REQUEST FOR PROPOSALS #2019-62

FOR

Park Avenue Community Project
Development and Design Standards

BOARD OF COUNTY COMMISSIONERS
  JIM BERNARD, Chair
  SONYA FISCHER, Commissioner
  KEN HUMBERSTON, Commissioner
  PAUL SAVAS, Commissioner
  MARTHA SCHRADER, Commissioner

________________________
Gary Schmidt
County Administrator

George Marlton
Procurement Division Director

Ryan Rice and Kim Randall
Analysts

PROPOSAL CLOSING DATE, TIME AND LOCATION

DATE:     August 21, 2019
TIME:     2:00 PM, Pacific Time
PLACE:    Clackamas County Procurement Division
          Clackamas County Public Services Building
          2051 Kaen Road, Oregon City, OR 97045
SCHEDULE

Request for Proposals Issued.......................................................... July 17, 2019
Protest of Specifications Deadline................................................. July 24, 2019, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions...................................... August 14, 2019, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time............................... August 21, 2019, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award........................................... Seven (7) days from the Intent to Award
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SECTION 1
NOTICE OF REQUEST FOR PROPOSALS

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until 2:00 PM, August 20, 2019 (“Closing”), to provide Park Avenue Community Project Development and Design Standards. No Proposals will be received or considered after that time.

RFP Documents can be downloaded from ORPIN at the following address: http://orpin.oregon.gov/open.dll/welcome, Document No. C01010-2019-62-19. Prospective Proposers will need to sign in to download the information and that information will be accumulated for a Plan Holder's List. Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from ORPIN. Sealed Proposals are to be sent to Clackamas County Procurement Services – Attention George Marlton, Director at 2051 Kaen Road, Oregon City, Oregon, 97045 or may be emailed to procurement@clackamas.us.

Contact Information
Procurement Process and Technical Questions: Ryan Rice, 503-742-5446, rrice@clackamas.us, or Kim Randall, 503-742-5443, krandall@clackamas.us.

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages proposals from Minority, Women, and Emerging Small Businesses.
SECTION 2
INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

2.1 Modification or Withdrawal of Proposal: Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

2.2 Requests for Clarification and Requests for Change: Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

2.3 Protests of the RFP/Specifications: Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

2.4 Addenda: If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check ORPIN for any notices, published addenda, or response to clarifying questions.

2.5 Submission of Proposals: Proposals must be submitted in accordance with Section 5. All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Certification Form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

2.6 Post-Selection Review and Protest of Award: County will name the apparent successful Proposer in a Notice of Intent to Award published on ORPIN. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers shall be given seven (7) calendar days from the date on the Notice of Intent to Award to review
the file at the Procurement Division office and file a written protest of award, pursuant to LCRB C-047-0740. Any award protest must be in writing and must be delivered by hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
c. reject all Proposals and cancel the procurement.

2.7 Acceptance of Contractual Requirements: Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

2.8 Public Records: Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a TRADE SECRET under ORS 192.345(2), SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:

“This information constitutes a trade secret under ORS 192.345(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” (ORS 192.345). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

2.9 Investigation of References: County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

2.10 RFP Proposal Preparation Costs and Other Costs: Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.
2.11 Clarification and Clarity: County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

2.12 Right to Reject Proposals: County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

2.13 Cancellation: County reserves the right to cancel or postpone this RFP at any time or to award no contract.

2.14 Proposal Terms: All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

2.15 Oral Presentations: At County’s sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer’s original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. Note: Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, written Proposals should be complete.

2.16 Usage: It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

2.17 Review for Responsiveness: Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer’s contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

2.18 RFP Incorporated into Contract: This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

2.19 Communication Blackout Period: Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

2.20 Prohibition on Commissions and Subcontractors: County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing.
to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor’s qualifications to perform required Work.

2.21 **Ownership of Proposals:** All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

2.22 **Clerical Errors in Awards:** County reserves the right to correct inaccurate awards resulting from its clerical errors.

2.23 **Rejection of Qualified Proposals:** Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

2.24 **Collusion:** By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

2.25 **Evaluation Committee:** Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

2.26 **Commencement of Work:** The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

2.27 **Best and Final Offer:** County may request best and final offers from those Proposers determined by County to be reasonably viable for contract award. However, County reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer’s best terms from a price and technical standpoint. Following evaluation of the best and final offers, County may select for final contract negotiations/execution the offers that are most advantageous to County, considering cost and the evaluation criteria in this RFP.

2.28 **Nondiscrimination:** The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

2.29 **Intergovernmental Cooperative Procurement Statement:** Pursuant to ORS 279A and LCRB, other public agencies shall have the ability to purchase the awarded goods and services from the awarded contractor(s) under terms and conditions of the resultant contract. Any such purchases shall be between the contractor and the participating public agency and shall not impact the contactor’s obligation to the County. Any estimated purchase volumes listed herein do not include other public agencies and County makes no guarantee as to their participation. Any Proposer, by written notification included with their Proposal, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies. County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the contractor awarded the contract by the County.
SECTION 3
SCOPE OF WORK

3.1. INTRODUCTION

Clackamas County, Oregon, working with the area residential and business community, is looking for an innovative and diverse team of public engagement, real estate and land use specialists to create development and design standards for commercial and multi-family zones within one-half mile of the Park Avenue/McLoughlin Boulevard intersection in unincorporated Clackamas County that will support the community’s long-term vision for the Park Avenue Station area.

The project’s area of focus includes unincorporated Clackamas County within one-half mile of the Park Avenue light-rail station (Appendix A, maps). The new mixed-use and commercial development and design standards are expected to have broad community support and be adopted into the county code by the Board of County Commissioners. In conjunction with creation of the code, the team will also be expected to continue to address the neighborhood analysis prepared during Phase I of this project to determine potential impacts that could be incurred by development in the project area.

The team will be expected to conduct an extensive and inclusive public engagement process to support the creation of multi-faceted development and design standards that reflect community values and interests, as described in Sections 3.4 Project Approach and 3.5 Scope of Work. To accomplish this goal all voices of the community will be sought, from highly engaged residents to marginalized community members, and from businesses and landowners to the development community. The selected consultant team is expected to bring forth both innovative and proven public engagement tools to gather and incorporate meaningful input from the broadest range of community representation.

Phase II is the continuation of Phase I that was conducted from Sept. 20, 2018 to June 11, 2019. During Phase I the consultant team researched market and demographic information, reviewed McLoughlin Area Plan (MAP) policies, worked extensively with the community and stakeholders in the project area, conducted an online survey, held a public meeting, and researched past planning projects related to the area. Phase I consultants also conducted a neighborhood assessment and developed an extensive and inclusive public engagement process. During Phase II, this public engagement process will be implemented to help ensure multi-faceted development and design standards are created to reflect community values and interests. The outcomes of Phase I are included in the three memos that were the Phase I deliverables, which can be found on the project website at www.clackamas.us/planning/parkave.

- Memo 1: Community Overview and Development Trends (May 10, 2019)
- Memo 2: Summary of Engagement: Roundtables and Survey (March 25, 2019)
- Memo 3: Recommended Revised Phase II Scope of Work (June 11, 2019)

The final Phase I report was submitted to the Board of County Commissioners on June 11, 2019. At that time the Board accepted the report and gave direction for the project to move ahead into Phase II.

The work of Phase I shall be used as the foundation for Phase II. The ultimate success for Phase II will be measured by the extent and quality of community and stakeholder participation, and by community and stakeholder understanding and support of the proposed development and design standards. Building trust with the community will be a key factor in achieving the desired outcome.

This project is funded through Metro’s 2040 Planning and Development Grant program, which awards grants to cities and counties in the Portland region to help remove barriers to private investment in development, promote planning activity that makes land ready for development, and help to implement the Portland region’s long term plan for livability, as outlined in the 2040 Growth Concept.
3.2. PURPOSE STATEMENT
We are looking for a consultant team to work with us as:

1. A community planner, being part of a unique opportunity both in terms of outcomes and the process for arriving at those outcomes;
2. A community engagement leader who, with the use of the McLoughlin Area Plan (MAP) documents that define community values and goals, will follow the public engagement guidelines developed in Phase I of the project, and meet with residents, businesses, land owners, developers, and other interested parties to create commercial/mixed-use development standards that further define and support those values and goals;
3. An innovative team that will employ skills and techniques to help the community fully realize the area’s future development potential, and
4. Technical experts who can develop unique development and design standards that support community goals and needs, and that are economically feasible for the desired development types.

By engaging in an innovative and inclusive public process guided by the recommendations from Phase I and the principles in the MAP mission statement below, the community intends to support equitable prosperity and sustainable abundance for residents, businesses and visitors as a means to ensure a livable community for future generations.

In the future, our community fabric of thriving neighborhoods, shops, restaurants and services is green and sustainable; healthy and safe; woven together by walkable tree-lined streets, trails, natural area and open spaces; and strengthened by our diversified local economy, great educational opportunities and engaged citizens.

- Mission statement of the McLoughlin Area Plan, 2010

The purpose of the new development and design standards is to encourage and maintain employment, housing and economic diversity along the McLoughlin transit corridor at the Park Avenue station over the next 20 years or for as long as the strategies employed remain effective. Redevelopment often impacts existing affordable housing, half-way houses, weekly rental motels, manufactured home parks, small businesses and other existing commercial uses. With new design and development standards, we hope to be ahead of the cycle of gentrification and displacement, and to ensure that clearly identified targets are developed based on community values.

Ultimately, the project aspires to create design standards to enable commercial development that promotes community goals; reinforces community identity; and generates a competitive market for new and diverse employment, multi-family housing and mixed-use opportunities. The final outcomes, including the partnership formed by strong community and business participation, should be a model that could be applicable in the future for other areas along McLoughlin Blvd.

3.3. BACKGROUND
Location: The project will focus on development and design standards for commercial and multi-family lands in unincorporated Clackamas County next to McLoughlin Boulevard within one-half mile of the Park Avenue Light Rail Station at the corner of Park Avenue and McLoughlin Boulevard. The project will also consider nearby unincorporated communities that may influence or be impacted by new development in the study area. This area is in the northwest corner of unincorporated Clackamas County, adjacent to the city of Milwaukie, nine miles south of downtown Portland.
Transportation infrastructure that is accessible to the project area includes State Highway 99E that directly serves area, State Highway 224 located just over a mile north of the project area, Interstate 205 located approximately 5 miles east of the project area via Highway 224, and Interstate 5 approximately 14 miles away via Highway 224 and Interstate 205. Light rail was added in 2015, supported by local, state and federal funds, to better connect the greater Oak Grove and McLoughlin area to the nearby cities of Milwaukie and Portland, Oregon.

**History:** The communities of Milwaukie, Oak Grove and Jennings Lodge were first connected by the Portland Traction Streetcar that began running between Portland and Oregon City in 1893. Homes and neighborhoods were built facing the line, which was at the heart of the neighborhood. State Highway 99E, which was completed in 1937, now cuts through the area from north to south as McLoughlin Boulevard. Highway 99E was the main north-south highway on the U.S. West Coast running from Mexico to Canada until the completion of Interstate 5 in 1964 – and McLoughlin Boulevard makes up a substantial portion of that highway in Clackamas County.

After cars became the dominant means of commuting, the streetcar stopped carrying passengers in 1958, although it carried freight until 1968. Auto-oriented commercial and retail uses have dominated the landscape along Highway 99E and continue to be prevalent. The Trolley Trail, a modern pedestrian and cycling trail built along the old streetcar corridor, was opened in 2012. This multi-use path connects Milwaukie to Gladstone and has direct access to the Park Ave Light Rail station. In 2015, the Park Ave Light Rail Station was opened. This is the southern-most station of the MAX Orange Line that provides direct access to and from downtown Portland.

Today the Trolley Trail is a focal point of the project area community for those who live nearby and use it to commute to the MAX light rail line or between the neighborhoods on foot or by bicycle. These new community assets, including the Trolley Trail and light-rail station, have set a standard for abundant habitat and connected, natural open space. They are models of success for integrating ecosystem services, educational elements and artistic identity that reflect community values.

**Past Community Planning Projects:** Various community groups, jurisdictions and individuals have engaged in planning and policy efforts related to the McLoughlin area for more than 30 years. A list of relevant studies and reports is available in Appendix B.

A community-led planning effort -- the **McLoughlin Area Plan (MAP)** -- began in 2008 to look at the future of the McLoughlin area, and was endorsed and funded by Clackamas County. The overall goal was to enhance and revitalize the businesses, neighborhoods and communities in unincorporated Clackamas County between the cities of Milwaukie and Gladstone, and between the Willamette River and Interstate 205. MAP included six miles of unincorporated Clackamas County land east and west of the McLoughlin Boulevard corridor between the Park Avenue station and the city of Gladstone. The MAP process resulted in adopted community vision and values, and a community advisory group known as MAP-IT (the McLoughlin Area Plan Implementation Team), which is still active today and is the co-sponsor of this project. The community remains highly engaged and concerned with all planning efforts in their community.

MAP adopted a vision framework and core values in 2010, with extensive input from the community, and later identified specific policies, projects and programs to implement that vision. It is imperative that these MAP components are addressed concurrently to provide a solid yet malleable framework for future evolution of core development, design and planning standards. The community’s renewed energy and vigor are focused to ensure this project will provide democratic tools to ensure cooperative planning is employed in the creation of development and design standards that will bring their vision and values to reality.
In 2010-11, the county developed the **Park Avenue Neighborhood and Station Area Planning Project**, sponsored by a $250,000 grant from the State of Oregon’s Transportation and Growth Management Program. The intent of this project was to enhance the area for transit-oriented development to capitalize on opportunities available to the community based on the new Park Avenue light rail station. The project intent was to look at allowing transit-oriented development in the station area and develop an overall concept for transitioning both the McLoughlin Boulevard commercial corridor and the Park Avenue Station Area to a more pedestrian-friendly and connected commercial district. The plan also intended to create special zoning for all residential and commercial unincorporated Clackamas County land within a ½ mile of the Park Avenue light rail station. The plan addressed a variety of housing types, economic development and reinforced natural elements and developed new code language that would have allowed for mixed use development in the area. However, the project lacked a robust public involvement component and the plan was ultimately not adopted by the Board of County Commissioners in 2012 largely due to significant opposition voiced by some community members.

**Transitioning into the future:** In spring 2017, the McLoughlin Area Plan-Implementation Team (MAP-IT) proposed to include a project in the 2017-18 Clackamas County Long Range Planning work program through which County staff would work with the community to apply for a 2040 Planning and Development Grant from Metro to create development and design standards along McLoughlin Blvd in the Park Ave Station Area that implements the MAP 1 and Map 2 vision for a more walkable, transit-oriented community near the light rail station. The grant application was successful, and the Metro Council awarded funds to the project in late 2017. A consultant was hired to complete Phase I of the project in on September 20, 2018, and the final Phase I report was submitted to the Board of County Commissioners on June 11, 2019. The Board accepted the report and gave direction for the project to move ahead into Phase II.

Now, with the southern terminus of the MAX Orange Line and station located at Park Avenue and McLoughlin Boulevard, we have an exciting opportunity to develop and apply development and design standards to the McLoughlin Boulevard corridor to provide a competitive market for future vibrant and innovative employment, multi-family housing diversity, and mixed-use developments. The newly developed standards will also take into account the multiple types of users – pedestrians, bicyclists, motorists and transit-riders. Rather than viewing Park Avenue as the “end of the line,” it can be refashioned as the entrance into the Oak Grove community and used as a prototype for future development along McLoughlin Boulevard and other similar areas in unincorporated Clackamas County and the region.

The new development and design standards will be the guidance that allows this area to transition from the historic auto-dominated uses along McLoughlin to development that supports the walkable, transit-oriented uses that can emerge around the light rail station. It will be essential to acknowledge that the existing development along the boulevard – typified by low-density, auto-dominant uses – still has a strong demand in today’s market. At the same time, existing development patterns are shifting both on the local and regional levels, so proposals should address how future development trends are reflected in any proposed new standards. Engagement and representation of the property owners and business owners along the corridor, as well as people in adjacent neighborhoods, will be essential to the success of the project.

Our goal is for the new project area development and design standards to be crafted with the help and support of the community to implement and build upon MAP Community Values and Guiding Principles and *The Five Components of the McLoughlin Area Plan*, which were approved by the Clackamas County Board of Commissioners in 2015. The outcome sought by both the community and County is to have design and development standards that support a welcoming, thriving business and residential community.
and offer equitable and sustainable affordable housing, economic diversity and innovation, employment, and accessibility for people of all ages, socio-economic levels and abilities.

3.4 PROJECT APPROACH
Knowing that complex community dynamics exist and that the Park Ave Station Area Plan from 2010-11 was not successful, there was a need for a community assessment before starting the technical work. Therefore, the project was divided into two phases.

Phase I: Park Avenue Community Assessment (Completed June 11, 2019).
The primary objective of the community assessment phase was to conduct thorough outreach to better understand the demographics and cultural/economic diversity of the area, identify existing community-based organizations and stakeholder groups, assess overall community awareness, opinions and support of the McLoughlin Area Plan (MAP) vision, and assess broader aspects of future development trends and neighborhood change. Phase I provides a broad foundation for inclusive and extensive public engagement to be used during Phase II.

Phase II: Development and Design Standard Creation and Implementation. The primary objective of Phase II is to undertake the technical components of the project, coupled with continued community engagement based on the Community Engagement Strategy developed during Phase I.

The major deliverables for Phase II include:
- Technical work and community engagement to develop options and vet proposed code refinements
- Park Ave Guiding Principles
- A framework plan
- An anti-displacement strategy
- Zoning and Development Code amendments and maps
- An action plan to implement the code amendments

At the conclusion of Phase II, the Board of County Commissioners (“BCC”) will receive a report on Phase II deliverables. Adoption-ready materials will be prepared for the Planning Commission and the Board of Commissioners for their consideration.

3.5 SCOPE OF WORK
The following scope of work is proposed for Phase II of this project. Amending the development and design standards for the commercial and multi-family residential areas within ½ mile of the Park Ave light rail station is only one of many actions that need to be taken to realize the all of the programs and projects identified in MAP. Including Guiding Principles specific to the Park Ave area and a Framework Plan will allow the community to discuss if there are opportunities outside of the existing commercial and multi-family area that would be suited for near-term investment to create a more walkable community. The successful proposer must demonstrate extensive, innovative experience and ability in engaging and working with the public and stakeholders to develop land use regulations and development strategies that support the community’s vision and values.

The consultant team shall be responsible for providing technical design and development expertise that will reflect the community’s vision for development of the Park Avenue project area. The consultant team should provide substantial knowledge regarding the implementation of the following elements that reflect the preliminary key themes which emerged based on community feedback in Phase I:
- Focus the project on the area one-half mile from the light rail station
- Enhance pedestrian and bikeway connectivity
- Encourage employment along McLoughlin Blvd
• Increase workforce housing
• Focus on the side streets first within the commercial and multi-family area for development
• Natural areas are an asset, not a barrier

The project will be supported by the Grant Management Team (GMT), which consists of the consultant project manager, County staff, Metro staff, the MAP-IT Chair or alternate, and member of the Park Ave Community Advisory Committee from the project area. The project is grounded in the community vision and values as described in the following documents:

- McLoughlin Area Plan Phase I (MAP 1) -- McLoughlin Area Plan Vision Framework (http://www.clackamas.us/mapit/documents/map1visionframeworkfinal.pdf)
- McLoughlin Area Plan Phase II (MAP 2) -- MAP Phase II Report (http://www.clackamas.us/mapit/documents/map2reportfinal.pdf)
- The Five Components of the McLoughlin Area Plan (http://www.clackamas.us/mapit/documents/fivecomponents.pdf)

The consultant will be expected to work closely with the community to implement the public engagement plan and complete the following scope of work.

**Task 1: Project Management**

The consultant team will work with the GMT to ensure that project work is well aligned with Metro grant funding and objectives. The consultant team will designate a Consultant Project Manager to work with the team to ensure successful completion of all phases of the project. At the outset of Phase II, the Consultant Project Manager will work with the team to establish a mutually agreeable schedule for project management check-ins and broader community meetings. This will help to ensure a smoothly managed project that delivers clear and expected results within budget and timeframe, and that meets requirements for Metro grant funding.

The consultant team will produce and implement the following project management tools:

**Deliverable 1.1** – Finalized Phase II project milestones and meeting schedule including dates and objectives for all established project check-ins, milestones and meetings.

**Deliverable 1.2** – Participation and facilitation of calls/meetings with project team, partners or community.

**Deliverable 1.3** – Written summaries of calls/meetings including outcomes and assigned action items.

**Task 2: Equitable Public Engagement Strategy**

As outlined in Phase I-Memo 2: Summary of Engagement, there is an expanded contact list of interested Park Avenue project area community members. Phase I also established preliminary key themes of common interests and priorities among commercial and residential stakeholders. This information and outreach sets a strong foundation for additional engagement, including with under-represented groups and interests.

Based on the research and recommendations in Phase I, the consultant shall prepare a final engagement strategy. Implementation of the strategy should include:

- Use of engaged community members to assist with outreach events and strategies to draw in a wider public;
- Various interactive engagement techniques, including hands-on exercises to engage and educate stakeholders about the relationship between walkability, density, public safety and parking,
about sustainable systems design practices, and report back to participants so the community can see how their comments have been reflected in the development and design standards;

- Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people, and people of all ages); and
- Specific practices to help ensure that participants feel their views and ideas have been heard, even if not adopted.

**Equitable Engagement**

Meaningful and necessary engagement should occur throughout the project. Defining how the Park Avenue project area develops should include as many various perspectives as possible. In order to effectively engage the diverse population identified in Memo 1 from Phase I, as well as the under-represented residential and business communities, significant collaboration with Oak Grove Elementary School will be needed to reach the desired population and address issues pertaining to their children. Furthermore, several members of the Park Avenue community have expressed a desire to lead more tactical outreach such as “door knocking” with project information and community events such as BBQs in the transit plaza. Such volunteers should be intentionally engaged in Phase II, with resources allocated to community events to enhance project understanding and enhance social connections throughout the project area. Finally, the organizations listed in Memo 1 should be engaged to assist with outreach to the broader community.

The consultant team will allocate time to working with local residents to implement the actions outlined above. Additionally, the community stakeholders within the one-half mile radius will be encouraged to work with Clackamas County staff to potentially secure grants to bring in national speakers regarding outcomes associated with the identified key themes.

**Deliverable 2.1** – Final Equitable Public Engagement Strategy – The final Equitable Engagement Strategy shall include outreach tools to incorporate the stakeholders identified during Phase I and activities that involve the community in a variety of ways, and to provide ways for the broader community to be engaged throughout the project. The strategy shall be reviewed and approved by the Park Avenue Community Advisory Committee.

**Governance Structure**

The Park Avenue Community Advisory Committee (PACAC) will have a direct relationship with the consultant. The consultant will be responsible for working with the GMT, Technical Advisory Committee (TAC) and the Park Avenue community to prepare the recommended deliverables throughout Phase II. The PACAC, in collaboration with the consultant, will develop the final recommendations for the Planning Commission, with technical support (staff reports, presentations, etc.) from the GMT. The proposed governance structure for Phase II and PACAC membership are outlined in Appendix C.

**Deliverable 2.2** - Meeting preparation, facilitation and meeting summaries for up to eight Park Ave Community Advisory Committee meetings.

**Deliverable 2.3** - Meeting preparation, facilitation and meeting summaries for up to three Park Ave Technical Advisory Committee meetings

**Task 3: Anti-Displacement Strategy**

New private development is sought after to provide necessary housing and desirable employment and amenities such as restaurants and neighborhood retail that serve the community. It is important to thoughtfully consider how this new investment will increase residential and business rents. There are organizations to engage and programs to implement that can proactively curtail displacement and allow existing residents and businesses to remain in the area if they choose to do so. Phase II must include
specific strategies related to organizations and programs needed to preclude displacement. This strategy should be prepared at the outset of the project to engage organizations as early as possible before private investment occurs.

The Anti-Displacement Strategy shall be completed in parallel with the work of the Framework Plan and Development and Design Standards. The PACAC shall be provided opportunities to discuss and develop recommendations for the strategy.

The strategy shall include tactics to preserve housing affordability, retain existing neighborhood businesses and help families achieve economic self-sufficiency, and shall be incorporated into the overall Implementation Action Plan. Examples of the types of tactics it could include are:

**Residential**
- Acquire and set aside land for affordable housing development
- Preserve apartment housing, discouraging housing demolition and requiring one-for-one replacement of affordable housing for any demolished low-income housing
- Provide information about tenant rights, foreclosure, home values and financial programs available to residents
- Provide direct assistance and information to reduce home utility and maintenance costs
- Provide affordable childcare to working parents
- Support the engagement of community-lead organizations

**Business**
- Provide technical assistance, counseling and education to small business owners
- Explore co-working centers
- Facilitate effective communication and collaboration with SBDC and Oregon Entrepreneurial partners
- Actively engage the local McLoughlin Area Business Alliance (MABA) in the process
- Develop a revolving loan fund with CBDG funds to assist businesses in the project area
- Mainstreet refresher training

Discussion of the Anti-Displacement Strategy shall be conducted with the PACAC through the project.

**Deliverable 3.1 – Anti-Displacement Strategy to implement during the project and after adoption of new or revised standards, to be incorporated in the Implementation-Action Plan**

**Task 4: Guiding Principles**
The creation of the Park Ave Guiding Principles (which will be aligned with the MAP Guiding Principles) shall be led in partnership with the McLoughlin Area Plan-Implementation Team (MAP-Team) and the Park Ave Community Advisory Committee.

Phase I largely prioritized existing MAP projects and programs established in 2012 as outlined below under Guiding Principles. However, these established principles do not fully consider two major topics:

1. Neighborhood Livability urban design trends and metrics (identified in Phase I Memo 1) that are needed to achieve desired outcomes such as walkability; and
2. Modern planning issues such as disaster resilience, shared mobility, the circular economy, etc., including sustainable energy, water, waste, food systems, etc. as well as new designs for the street of the future, new housing types and new forms of mobility.

Updated Park Avenue Guiding Principles are necessary to document the values that the community views as most important. They should be informed by the Key Themes presented and discussed with
stakeholders at the April 9, 2019 community meeting (reported in Phase I Memo 3). These Guiding Principles will provide clarity for Phase II regarding issues in which there is broad consensus or, conversely, issues that require more education and discussion. The overall intent is to efficiently and effectively utilize the stakeholder input provided to date. Phase II should build off the work in Phase I, not repeat it. Furthermore, Park Avenue Guiding Principles will align with currently adopted MAP Guidelines to ensure consistency in policy direction.

Before embarking on physical design and development standards, the community should be engaged to verify priorities and understand the potential trade-offs that would be required to achieve them. The Park Ave Community Advisory Committee (PACAC) and community members should provide community education events and other forms of equitable engagement for a variety of stakeholders to learn about and discuss urban design trends needed to achieve desired outcomes.

For example, many stakeholders have expressed support for such items as a walkable district or nighttime safety on the Trolley Trail without recognizing what is needed to achieve these things: mostly residential density. Residential density provides the rooftops to support development of services. Connectivity helps people get to and from these services, and safety comes from “eyes on the street” forms of development. Some education on how all these things are interconnected and mutually supportive will help people understand trade-offs and desired outcomes.

In addition, this phase of the project should include identifying actions needed to support increased residential development in the appropriate locations along the McLoughlin Corridor. The initial development of the Park Ave Guiding Principles shall be led by the Park Ave Community Advisory Committee with the support of the Grant Management Team. While the consultant selection and the contract is being finalized, the Park Ave Community Advisory Committee shall meet to discuss the background to the Park Ave Guiding Principles, including MAP Guiding Principles and the key themes identified during Phase I. After the consultant work begins, at least two education workshops or comparable activities shall be conducted and the Park Ave Guiding Principles finalized by the Park Ave Community Advisory Committee. The consultant shall prepare the final document of the Park Ave Guiding Principles, and these shall be used as the foundation for the Framework Plan.

**Deliverable 4.1** – Compilation of information about Neighborhood Livability and modern planning issues to be used during the two or more educational workshops or comparable activities:

- Neighborhood Livability urban design trends and metrics (identified in Memo 1 from Phase I) that are needed to achieve desired outcomes such as walkability; and
- Modern planning issues such as disaster resilience, shared mobility, the circular economy, etc. This means issues of sustainable energy, water, waste, food systems, etc. will all come to the forefront as will new designs for the street of the future, new housing types, and new forms of mobility that should be considered.

**Deliverable 4.2** – At least two education workshops or comparable activities to discuss best practices for land use regulations and development in mixed-use zones, with projects, tools and strategies to maximize:

- Transit-supportive development
- Long-term affordability and affordable housing
- Sustainability
- Local economic benefit
- Living-wage work
- Community health
- Natural environment
- Collaboration
Deliverable 4.3 - Documented Park Avenue Guiding Principles (aligned with MAP) that are unique to the Park Avenue project area and set the foundation for Phase Task 5: Framework Plan.

Task 5: Framework Plan
Once the Park Avenue Guiding Principles are established, it is important to create a graphic Framework Plan that provides clear guidance to the current property owners, business owners and residents, as well as potential new developers, regarding the vision for the Park Ave area. The framework plan will clearly delineate elements on a map such as future pedestrian and bike connections, locations for new housing or employment uses, and how side streets can develop all within the context of the approved Park Avenue Guiding Principles. The framework plan will only be finalized with the support of the PACAC and community members.

To garner support of area landowners and the development community, the framework plan should include development opportunity areas that illustrate site-specific design interventions with supporting development proformas to ensure that the plan is economically practical, contributes to the creation of a sense of place and makes market sense. This will not only keep the framework plan grounded in market reality, but also serve as an important tool for property owners to understand how the value of the property will increase with more development opportunities allowed through new design and development standards.

It will also be important to distinguish between the high specificity of a master plan versus the conceptual systems-level detail of a framework plan. The framework plan must be organized for flexibility and to encourage organic, catalytic growth and change. The framework plan should focus on development strategy, urban design principles, potential options for development, design precedents, circulation and parking strategies, and site development vignettes.

Deliverable 5.1 – Framework plan graphic showing development opportunity areas, potential connections, public open space opportunities, and types of development and densities. The Framework Plan will
- Delineate elements on a map such as future pedestrian and bike connections;
- Locations for new housing or employment uses; and
- How side streets can develop all within the context of the approved Park Avenue Guiding Principles.

Deliverable 5.2 – Framework Plan incorporating Park Avenue Guiding Principles and information on plan implementation.
- Focus on development strategy;
- Include urban design principles;
- Identify potential options for development; and
- Include design precedents, circulation and parking strategies, and site development vignettes.

Task 6: Development and Design Standards
Development and design standards for the Park Avenue project area shall be created that achieve the desired graphic vision of the Framework Plan and support the guiding principles. It will be important to include adequate parking and design standards to minimize impacts on residential areas. Furthermore, creating agreements with the Oregon Department of Transportation (ODOT) pertaining to McLoughlin Boulevard will be important to proactively involve ODOT in achieving shared objectives for pedestrian safety that are aligned with automobile and truck mobility.

It is strongly recommended that the new standards are as flexible as possible to allow new uses to enter the area aligned with market conditions. For example, rather than recommending that retail be mandated
on the ground floor of all new mixed-use development, it may be more appropriate to mandate “active uses” on the ground floor. These could include retail but could also include community space, day-care, art galleries, small-scale makers’ spaces and a variety of other pedestrian-friendly activities. Regulations should mandate pedestrian activity and walkability through good design that includes lighting, signage, landscape, and building transparency as well as active uses. The regulations should also support the development of residential uses along the corridor.

The expected outcome of Task 6 is to have proposed amendments to the Zoning and Development Ordinance that:

- Are enforceable, realistic and, as appropriate, incremental;
- Provide a clear path to achieving community goals;
- Are outcome-based;
- Reflect the input from and are widely supported by developers, property owners and the public;
- Incorporate lessons learned from tests on actual or hypothetical sites;
- Are consistent with best practices, opinions and findings discovered in Phase 1 and throughout the Phase II process, including the findings of the Phase 1 Neighborhood Livability assessment, and the McLoughlin Area Plan (MAP) community values and vision, and
- Facilitate incremental shifts toward the intended development goals for the area.

**Deliverable 6.1 – Draft Development and Design Standards for the commercial and multi-family residential areas, as identified in the Framework Plan.** These standards shall:

- Achieve the desired graphic vision of the Framework Plan and support the guiding principles;
- Include adequate parking and design standards to minimize impacts on residential areas; and
- Involve ODOT in achieving shared objectives for pedestrian safety that are aligned with automobile and truck mobility.

**Deliverable 6.2 - Summary of application of the draft standards tested on actual and/or hypothetical sites/opportunity areas in the Framework Plan, with an assessment of how well the standards meet the following objectives:**

- Illustrate the outcomes and reflect MAP values and community input;
- Are effective in meeting the Park Avenue Guiding Principles developed in Deliverable 4.3;
- Respond to real estate market / developer needs while maintaining the integrity of the community vision and values for new development; and
- Are economically feasible for the preferred development types (including a feasibility analysis of actual or hypothetical sites to test the economic viability of proposed standards).

**Deliverable 6.3 – Proposed development and design standards report including proposed zoning codes, map amendments and outline of process necessary for adoption.**

**Task 7: Implementation Action Plan**

The expected outcomes for the Implementation Action Plan are clear communication and understandable materials to facilitate implementation of the Framework Plan and new design and development standards. In addition, the Action Plan is expected to provide guidance on any other recommended activities the County and community can take to support desired development in the area, taking into account findings from the Phase I livability assessment for nearby residential areas. The consultant team will produce the following deliverables:

**Deliverable 7.1 – Action plan of specific projects or programs necessary to implement the Framework Plan.** Action plan will identify a specific organization and roles responsible for leading project completion, timeframe and metric. The Action Plan shall incorporate the recommendations included in
the Anti-Displacement Strategy. The types of projects or program that could be included in an Action Plan, but not limited to, are listed below:

- Establish a “Champion” to help oversee the project area consistent with the project goals and vision;
- Develop a toolkit to identify various financial and technical assistance available to residents and business owners/renters;
- Establish a Park Avenue Business District in concert with MABA;
- Develop measuring matrices to monitor neighborhood change; and
- Develop an incentives toolkit (private and public partnerships)

Deliverable 7.2 – Presentation to the Board of County Commissioners. The materials presented to the BCC shall include the following reports:

- **Anti-Displacement Strategy**
- **Public Engagement Report** – A comprehensive public engagement report that documents the engagement process undertaken and reports on performance measures to describe the success of the public engagement plan. Report should include all visual communications, graphic materials and meeting summaries.
- **Park Avenue Guiding Principles and Framework Plan**
- **Summary of Proposed Development and Design Standards** - Adoption-ready maps and code text amendments for the Planning Commission and County Commission, including County Zoning & Development Ordinance amendments to implement the proposed development and design standards, and recommended zoning and other policy changes to support future development and livability.
- **Implementation Action Plan**

3.3.3. **Term of Contract and Budget:**
The term of the contract shall be from the effective date through **June 30, 2020**, and the budget range for this project is between $130,000 and $155,000.

3.3.4 **Sample Contract:** Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample [Professional Services Contract](https://www.clackamas.us/finance/terms.html) for this RFP can be found at https://www.clackamas.us/finance/terms.html.

Professional Services Contract (unless checked, item does **not** apply)
The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision
The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than $1,000,000 per occurrence, with an annual aggregate limit of $2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than $1,000,000 per occurrence, with an annual aggregate limit of $2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than $500,000 per occurrence for Bodily Injury and Property Damage.
SECTION 4
EVALUATION PROCEDURE

4.1 An evaluation committee will review all Proposals that are initially deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative(s).

4.2 Evaluation Criteria

<table>
<thead>
<tr>
<th>Category</th>
<th>Points available:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposer’s General Background and Qualifications</td>
<td>0-15</td>
</tr>
<tr>
<td>Approach to Innovative Community Engagement</td>
<td>0-35</td>
</tr>
<tr>
<td>Approach to Creative Design &amp; Development Standards</td>
<td>0-25</td>
</tr>
<tr>
<td>Approach to Equity</td>
<td>0-15</td>
</tr>
<tr>
<td>Fees</td>
<td>0-10</td>
</tr>
</tbody>
</table>

Available points: 0-100

4.3 Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.
SECTION 5
PROPOSAL CONTENTS

5.1. Vendors must observe submission instructions and be advised as follows:

5.1.1. Complete Proposals may be mailed to the below address or emailed to Procurement@clackamas.us. The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the Proposal. If the Proposal is mailed, an original copy and an electronic copy (on compact disk or jump drive) must be included. The Proposal (hardcopy or email) must be received by the Closing Date and time indicated in Section 1 of the RFP.

5.1.2. Mailing address including Hand Delivery, UPS and FEDEX:

Clackamas County Procurement Division – Attention George Marlton, Director
Clackamas County Public Services Building
2051 Kaen Road
Oregon City, OR 97045

5.1.3. County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

5.1.4. Proposal may not exceed a total of 20 pages (single-sided), inclusive of all exhibits, attachments or other information.

Provide the following information in the order in which it appears below:

5.2. Proposer’s General Background and Qualifications:
• Describe your firm/consultant team including your firm’s experience (with an emphasis on projects similar to this one) and what distinguishes you from other firms doing similar work.
• Describe the ability, skills and experience needed to meet the requirements in Section 3, Scope of Work, including how you would successfully accomplish the work on time and within budget:
• Provide credentials/experience of the individuals who would be assigned to this project, including resumes for each member of the consultant team.

5.3. Approach to Equitable Public Engagement Strategy:
• How would you identify and use contributions from community groups and other local resources to support success of the project. How have you used community-driven outreach ideas with community participation?
  o Guiding Principles
  o Anti-Displacement Strategy
• The project involves community members, business owners, landowners, partners, stakeholders, various age (youth, middle, and senior ages) and economic levels, and other participants with a wide variety of viewpoints and interests. Describe how -- with such a diverse audience -- you would design a process and identify tools to ensure an informed public engagement, project transparency, participation and consensus toward common benefit is achieved.
• Provide your past examples of effective public engagement outcomes, how they were measured and the success and lessons learned on unsuccessful events.
5.4. Approach to Development and Design Standards:
- Provide an example of using a values-driven, evidence-based approach to the creation of a Framework Plan, and design and development standards.
- Describe your experience with crafting clear, effective and adaptable code-based development and design standards. Include examples of standards you have created. If the standards were not implemented, please explain why.
- Describe what methods you would use to build support for the proposed Framework Plan, and development and design standards among the diverse audiences described above.
- Provide outcomes after development and design standards have been in place for a period of time. What does the project area look like today?

5.5 Approach to Equity:
- Describe how you would apply equity principles throughout all aspects of the project, including ensuring representation from under-represented communities.
- The use of COBID-certified minority-owned businesses, woman-owned businesses, businesses that service disabled veterans, owned and emerging small businesses is encouraged to the maximum extent practical. Indicate if your firm is a COBID-certified business, describe the diversity of demographics of the proposal team including subcontractors (if applicable), and identify any proposed methods or approaches to include under-represented communities. [COBID -- Oregon Certification Office for Business and Diversity]
- Explain how well your proposal will advance racial equity and diversity through:
  - The inclusion of COBID-certified businesses,
  - Overall diversity of the lead firm,
  - Inclusion and engagement of other partners or methods.

5.6 Fees:
Fees should:
- Be on a time and materials with a not-to-exceed fee basis,
- Be sufficiently descriptive to facilitate acceptance of a proposal, and
- Have an outline of all estimated expenses, hourly rates for all assigned individuals, anticipated travel and other reimbursable expenses.
PROPOSAL CERTIFICATION
RFP #2019-62 Park Avenue Community Project
Development and Design Standards

Submitted by: _____________________________________________
(Must be entity’s full legal name, and State of Formation)

The undersigned, through the formal submittal of this Proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to provide the services as specified in accordance with the RFP, for the price set forth in the Proposal documents.

Proposer, by signature below, hereby represents as follows:

(a) That no County elected official, officer, agent or employee of the County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its elected officials, officers, agents, or employees had induced it to enter into this contract and the papers made a part hereof by its terms;

(b) The Proposer, and each person signing on behalf of any Proposer certifies, in the case of a joint Proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:

1. The prices in the Proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other Proposer or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in the Proposal have not been knowingly disclosed by the Proposer prior to the Proposal deadline, either directly or indirectly, to any other Proposer or competitor;
3. No attempt has been made nor will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restraining trade;

(c) The Proposer fully understands and submits its Proposal with the specific knowledge that:
1. The selected Proposal must be approved by the Board of Commissioners.
2. This offer to provide services will remain in effect at the prices proposed for a period of not less than ninety (90) calendar days from the date that Proposals are due, and that this offer may not be withdrawn or modified during that time.

(d) That this Proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.

(e) That the Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.

(f) That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal, and any modifications, will be made part of the contract documents. It is understood that all Proposals will become part of the public file on this matter. The County reserves the right to reject any or all Proposals.

(g) That the Proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.
(h) That the Proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation and in addition that the Proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.

(i) That the Proposer is legally qualified to contract with the County.

(j) That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

(k) The Proposer agrees to accept as full payment for the services specified herein, the amount as shown in the Proposal.

☐ Resident Bidder, as defined in ORS 279A.120
☐ Non-Resident Proposer, Resident State

Oregon Business Registry Number ________________________________

Contractor’s Authorized Representative:

Signature: ___________________________ Date: ___________________________

Name: ___________________________ Title: ___________________________

Firm: ________________________________________

Address: ______________________________________

City/State/Zip: ___________________________ Phone: (____) ________

e-mail: ___________________________ Fax: ___________________________

Contract Manager:

Name ___________________________ Title: ___________________________

Phone number: ___________________________

Email Address: ___________________________
APPENDIX A – MAPS

MAP 1: McLoughlin Corridor with Project Area Circled
MAP 2: Project Area Detail

[Map Image]
APPENDIX B

Past Plans and Studies Related to the McLoughlin Boulevard Corridor, and McLoughlin / Park Avenue Intersection and Light-Rail Station

The McLoughlin Corridor – McLoughlin Boulevard from the Gladstone city border to the south to the Milwaukie city border to the north – and the surrounding area has been the focus of a variety of studies and task forces over the years. Some key studies and recommendations are briefly summarized here.

**Park Avenue Community Project – Phase I**
*Purpose:* To conduct outreach to better understand the demographics and cultural/economic diversity of the area, identify community-based organizations and stakeholder groups, assess overall community awareness, opinions and support for the McLoughlin Area Plan vision, and assess broader aspects of development trends and neighborhood change.

*Lead:* Clackamas County Planning & Zoning

*Result:* The consultant researched the project area, conducted education and outreach, and proposed recommendations for Phase II. The deliverables included three memos that reviewed the demographics and economic trends, and provided a neighborhood assessment of the project area. The memos addressed findings from meetings with project area stakeholders, survey results and a Scope of Work with recommendations for extensive public engagement strategies to implement in Phase II.

**Park Avenue Station Area Planning Project / Neighborhood Plan, 2010-12**
*Purpose:* Adopt a Park Avenue Station Area Plan and supporting zoning ordinances to provide for diverse and thriving housing, commercial and economic opportunities in the area within one-half mile around the new light-rail station planned for the intersection of Park Avenue and McLoughlin Boulevard in unincorporated Oak Grove, just south of Milwaukie.

*Lead:* Clackamas County Planning & Zoning Division

*Result:* Recommendations for land use and transportation were developed on three topics:
- Circulation plan
- Open space / street environment
- Urban design elements and frontages, and regulating plan / desired land use

The recommendations were submitted to the Clackamas County Planning Commission in late 2011 and the Board of Commissioners in early 2012. There was strong community opposition and the plan was not adopted.

**Tourism Development Task Force, 2008-09**
*Purpose:* Study issues related to tourism and make recommendations to the Board of County Commissioners to help ensure continued tourism development.

*Lead:* Clackamas County Tourism Department

*Result:* The task force made the following recommendations related to the McLoughlin area:
- Create a tour route along McLoughlin Boulevard, but do not preclude future light rail
- Develop enhanced street connections between McLoughlin Boulevard and the Willamette River with public access areas/sites on the riverfront
- Explore possible acquisition of more public access to the river
- Establish a major visual icon at the entrance traveling south into Clackamas County on McLoughlin Boulevard to establish a sense of arrival.
**Trolley Trail Master Plan, 2002-04**

*Purpose:* Analyze and recommend a trail alignment, environmentally-sensitive trail design features, trail amenities, and safety and security measures for the six-mile trail corridor to guide the future development and safe use and operation of the Trolley Trail as a non-motorized recreational and commuter trail.

*Lead:* Clackamas County North Clackamas Parks & Recreation District

*Result:* Recommendations included the following:

- Develop five potential trailheads and 25 pedestrian access points from neighborhood roads
- Connect to community facilities including parks, schools, retirement communities and public transit
- Develop intersection improvements and safety and security features, including strategically-placed lighting and good definition between the trail and adjacent neighbors

Construction of the six-mile Trolley Trail from Gladstone to Milwaukie on the east side of the Willamette River was completed 2012.

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**Portland-Milwaukie Light Rail Project: Locally Preferred Alternative Report, 2007-08**

*Purpose:* Analyze proposed station areas along the Southeast Portland, Milwaukie and North Clackamas County portions of the proposed Portland-Milwaukie light rail alignment.

*Lead:* TriMet (Tri-County Metropolitan Transit District of Oregon)

*Result:* The report included the following recommendations for transit improvements in the Portland-Milwaukie corridor:

- Develop a light rail station within the study area at Park Avenue
- Develop a park-and-ride station at Park Avenue with 1,000 parking spaces
- Redevelop and rehabilitate existing buildings, as streetscapes and pedestrian connections

The Portland-Milwaukie light rail line, known as the MAX Orange Line, opened in September 2015, with its southern terminus at the corner of Park Avenue and McLoughlin Boulevard in unincorporated Clackamas County. There is a park-and-ride across the street from the station, with a parking garage that holds approximately 40 cars and 100 bicycles.

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**McLoughlin Corridor Land Use and Transportation Study, 1998-99**

*Purpose:* Provide community-preferred design alternatives for the McLoughlin Corridor, including recommended cross-sections and other street design and transportation improvements, and recommendations related to zoning and land use.

*Lead:* Clackamas County

*Result:* Key recommendations from the final, approved plan include the following:

- Develop continuous bike lanes, sidewalks, lighting, landscape buffers and elimination of on-street parking
- Improve transit facilities and bus rapid transit
- Evaluate suitability of an Urban Business Area Overlay as a means of addressing access management
- Implement transit-oriented development standards while retaining existing zoning
- Enforce the sign ordinance and encourage connections between parking lots
Oak Grove Transportation Growth Management Plan Draft, 1994-95

Purpose: Provide direction for new growth and development for Oak Grove over the next 50 years with a mixture of services, employment and housing in a single, concentrated, walkable area.

Lead: Clackamas County Department of Transportation & Development

Result: The plan included recommendations related to walkways and transportation, land use and redevelopment, and downtown design and revitalization, such as:

- Develop a trail on Portland Traction Company trolley line
- Provide sidewalks and transit stops on essential streets
- Revise local residential street standards, and new street and pedestrian / bike accessways
- Create more compatible zoning in Oak Grove.

The plan did not receive community consensus and was never finally approved.
APPENDIX C

Community Engagement Strategy

Park Avenue Community Project
Phase II: Design and Development Standards

This document describes the Community Engagement Strategy for Phase II of the Park Ave Development and Design Standards project, also known as the Park Avenue Community Project. It outlines important elements to be included in the charter for the Park Avenue Community Advisory Committee (PACAC). In addition, it defines the organizational structure and decision-making process for the project, including the Grant Management Team, the Technical Advisory Committee, and PACAC membership and responsibilities.

The strategy outlined below specifically addresses:

- Use of engaged community members to assist with outreach events and strategies to draw in a wider public;
- Various interactive techniques to engage the broader community, including reporting back to participants so that the community can see how their comments have been reflected in the development and design standards;
- Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people and people of all ages);
- How the plan will work to ensure that participants believe their views and ideas have been heard, even if not adopted, and
- The appropriate roles and responsibilities for deliberation and decision-making for code adoption, including the role, composition and authority of any advisory committees (or other groups/committees that should be used during the project), project staff, consultant team members, the Planning Commission, Board of Commissioners and any other parties that need to have a role in developing, vetting and approving policy for the county.

In addition, throughout the Phase I process, community members conveyed that they want to be actively engaged with the outreach to existing residents who may be under-represented. Community volunteers would like to implement specific outreach efforts such as door-knocking or hosting community events (such as a BBQ) to build connections with fellow residents and meaningfully engage community members. These efforts are important to foster collaboration and trust throughout the Park Avenue community and sustain ongoing efforts to build the desired community. It is recommended in Phase II that the selected consultant include in the scope of work the appropriate time and budget to manage the volunteers and constructively incorporate their volunteer efforts into the public engagement strategy.

Project Purpose

The purpose of implementing Phase II is to encourage and increase employment, housing and economic diversity along the McLoughlin transit corridor at the Park Avenue station in accordance with community aspirations. Redevelopment often impacts existing affordable housing, half-way houses, weekly rental motels, manufactured home parks, small businesses and other existing commercial uses. Programs to preclude the cycle of gentrification and displacement will be implemented early in the project process.
Ultimately, the project aspires to create design standards to enable commercial development that promotes community goals; reinforces community identity; and generates a competitive market for new and diverse employment, multi-family housing and mixed-use opportunities.

The Park Avenue Community project area consists of the one-half mile radius in unincorporated Clackamas County surrounding the Park Avenue station. The final boundary may shift slightly to align with adjacent roadways such as Courtney Road and property lines in order to make recommended design and development standards that align with tangible boundaries.

### Project Organizational Structure and Decision Making

The project will be supported by a Grant Management Team (GMT), provided technical input from a Technical Advisory Committee (TAC) and have a Park Ave Community Advisory Committee (PACAC) that is responsible for providing leadership and guidance regarding the community perspective on elements brought forward during the project. Together these groups will be responsible for receiving community input, evaluating technical information and making recommendations. Ultimately, the package of recommendations that have been moved forward by the PACAC will be presented to the Clackamas County Planning Commission. The Planning Commission will consider the proposal and develop a recommendation to the Board of County Commissioners. The Board will hear the recommendation from the PACAC and the Planning Commission, and will hold a public hearing before making its final decision on elements to be adopted or amended into the Clackamas County Comprehensive Plan and the Zoning and Development Ordinance.

#### Park Avenue Community Advisory Committee (PACAC)

The PACAC will serve in an advisory capacity and its input will inform the development of the recommendations (or options) submitted to the Planning Commission. The PACAC is responsible for providing feedback regarding proposed design and development standards that implement the vision of future development for the Park Avenue Community project area. The PACAC should strive to help the consultants craft and recommend approaches and solutions that are workable for a wide range of needs and interests. The group should engage in open, respectful and constructive dialogue to ensure that potential solutions and recommendations are well tested and that diverging opinions are aired, discussed and documented. The thoughtful expression of differing perspectives will help inform balanced solutions and, as much as possible, lead to consensus.

PACAC members should acknowledge that their role is to provide advice and help develop recommendations. Members will serve for 12-18 months. Upon project completion, the PACAC will cease to be a formal body serving the Park Avenue community.

#### Park Avenue Community Members (Community)

In order for the final project deliverables of Phase II to be adopted and supported, there must be substantial community input. Broad engagement of residents, business owners and property owners within the ½-mile radius is critical to establish the Park Avenue Guiding Principles and subsequent deliverables. Community member engagement will be managed and summarized by the consultant team to shape recommendations submitted to the PACAC. Assistance with some of the engagement implementation (e.g. door-knocking) will be provided by community stakeholders.

#### Grant Management Team (GMT)

The Grant Management Team will be made up of Clackamas County planning, economic development and community engagement staff, a representative of MAP-IT, a PACAC member who lives, works or owns property in the project area, a representative of Metro and the consultant lead. The GMT will be responsible for managing the project and overseeing development of draft design and development standards to be reviewed by
the Park Avenue Community Advisory Committee (PACAC) and the Technical Advisory Committee (TAC). The Consultant Project Manager will oversee the consultant team that will include experts in the implementation of design and development, equitable public engagement, and public-private real estate development and equitable/sustainable community design.

**Technical Advisory Committee (TAC)**

The TAC is responsible for providing feedback on technical code standards and requirements that regulate design and development standards. The TAC will note if any proposed design and development standards recommended by the GMT conflict with existing regulations, and comment on appropriate action needed to determine feasibility of proposed standards. The TAC will make recommendations to the PACAC on the proposed standards and other project elements.

The following diagram depicts the roles and responsibilities for project deliberation and decision-making:

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**Park Avenue Community Advisory Committee (PACAC) Membership**

The PACAC will be made up of project area residents, commercial property and business owners within the half-mile radius of the Park Avenue station, as well as representatives of broader interests that are impacted by the project.

The membership will provide a balanced representation of geographic and special interest stakeholders, including residents, businesses, and commercial property owners within the project area, and diverse representation including a balance of races/ethnicities, gender, age, sexual orientation, ability, family structure, etc. At least two of the representatives will be from marginalized communities that are often under-represented.
in the decision-making process, including people of color and those with lower incomes. As much as possible, the membership will be made up of people who live, work and/or own property or a business in the project area.

The members will be recommended by Clackamas County with review by Metro and final appointment by the Board of County Commissioners. Members will be nominated as follows:

Clackamas County will nominate up to 10 representatives from within the project area as follows:
- 1 resident that is a home owner
- 1 resident that is a mobile home owner or renter
- 1 resident that is a renter in a multi-family residence
- 1 resident that is a renter in a single-family residence
- 1 MAP-IT residential representative
- 2 business owners
- 2 commercial property owners (not residential)
- 1 owner or manager of a multi-family residential property or mobile home park

Clackamas County will nominate eight community representatives with expertise in the following areas of special interest:
- 1 representative of senior interest groups
- 2 representatives of youth interest groups
- 1 representative of Oak Grove Elementary School
- 1 representative of multi-modal transportation interests
- 1 representative of natural habitat protection and enhancement interests
- 1 representative of affordable housing advocacy
- 1 representative of social justice advocacy

**Technical Advisory Committee (TAC) Membership**

The TAC will be made up of staff members from Clackamas County, Metro and the Oregon Department of Transportation (ODOT) with expertise in planning, bike/pedestrian transportation, engineering, community engagement, affordable housing, parks and open space design. Additional members may be added if other expertise in needed.

- 1 representative of Metro
- 1 representative of ODOT
- 1 representative of TriMet
- 1 representative of affordable housing developers
- 1 representative of commercial development or leasing (not with interests in the area)
- 1 representative of Clackamas County Housing Authority
- 1 representative of Clackamas County Economic Development
- 1 representative of Clackamas County Transportation & Development
- 1 representative of North Clackamas Parks & Recreation District