

01/18/2024

BCC Agenda Date/Item: \_\_\_\_\_

Housing Authority Board of Commissioners  
Clackamas County

**Approval of an Intergovernmental Agreement with Metro for a 2040 Planning and Development Grant to support planning and predevelopment activities for the Clackamas Heights Redevelopment Project. Grant value is \$375,000 for 24 months. No County General Funds are involved.**

<b>Previous Board Action/Review</b>	08/10/2023 – Approval to apply for a 2040 Planning and Development Grant 01/16/2024 – Item presented at Issues		
<b>Performance Clackamas</b>	This funding aligns with the County’s strategic priority to ensure safe, healthy, and secure communities by increasing the inventory of affordable housing units in Clackamas County.		
<b>Counsel Review</b>	Yes	<b>Procurement Review</b>	No
<b>Contact Person</b>	Devin Ellin, Director of Housing Development, HACC	<b>Contact Phone</b>	971-227-0472

**EXECUTIVE SUMMARY:**

The Housing Authority of Clackamas County (HACC), a Division of the Health, Housing, and Human Services Department, requests approval of an intergovernmental agreement with Metro to accept a 2040 Planning & Development Grant award to be used to support concept planning for the redevelopment of Clackamas Heights. The grant value is \$375,000, to be expended over 24 months.

Metro’s 2040 Development Grants are multi-year grants that encourage the development of affordable communities that improve opportunities and quality of life for people in marginalized communities.

The redevelopment of Clackamas Heights aims to replace 100 units of near-obsolete public housing with 200+ units of newly constructed affordable housing in alignment with HACC’s public housing repositioning plan. These grant funds will support robust community engagement and other planning activities.

This IGA serves as the grant agreement to accept the award of \$375,000 to be used over 24 months.

**RECOMMENDATION:** Staff recommends that the Board approve IGA # with Metro to accept 2040 Grant funds to support the Clackamas Heights Redevelopment project.

Respectfully submitted,

*Rodney A. Cook*

Rodney A. Cook  
Director of Health Housing and Human Services

For Filing Use Only

**2040 PLANNING AND DEVELOPMENT GRANT  
INTERGOVERNMENTAL AGREEMENT  
Metro – Housing Authority of Clackamas County  
Clackamas Heights Redevelopment**

This 2040 Planning and Development Grant Intergovernmental Agreement (this “Agreement”) is entered into by and between Metro, a metropolitan service district organized under the laws of the state of Oregon and the Metro Charter, located at 600 Northeast Grand Avenue, Portland OR, 97232 (“Metro”), and the Housing Authority of Clackamas County, a public corporation organized under ORS Chapter 456, located at 13930 Gain Street, Oregon City, OR, 97045 (“HACC”). Metro and HACC may be jointly referred to herein as the “Parties” or each, individually as a “Party”.

**RECITALS**

WHEREAS, Metro has established a Construction Excise Tax (“CET”), Metro Code Chapter 7.04, which imposes an excise tax throughout the Metro regional jurisdiction to fund regional and local planning that is required to make land ready for development after inclusion in the Urban Growth Boundary; and

WHEREAS, the CET is collected by local jurisdictions when issuing building permits, and is remitted to Metro pursuant to Intergovernmental Agreements to Collect and Remit Tax entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, HACC has submitted a 2040 Planning and Development Grant Request application attached hereto as **Exhibit A** and incorporated herein (the “Grant Request”) for the Clackamas Heights Redevelopment Project (the “Project”); and

WHEREAS, Metro has agreed to provide 2040 Planning and Development Grant Funds to HACC for the Project in the amount of \$375,000 subject to the terms and conditions set forth herein (the “Grant Funds”), and the Parties wish to set forth the timing, procedures, and conditions for receiving the Grant Funds from existing CET funds for the Project.

**AGREEMENT**

NOW THEREFORE, the Parties hereto agree as follows:

1. Metro Grant Award. Metro shall provide the Grant Funds to HACC for the Project as approved by the Metro Council and as described in the Grant Request, subject to the terms and conditions specified in this Agreement.
2. Project Management and Coordination. The Parties have appointed the staff identified below to act as their respective project managers (each a “Project Manager” and collectively “Project Managers”) with the authority and responsibility described in this Agreement:

For HACC:	Devin Ellin, Director of Housing Development Housing Authority of Clackamas County 971-227-0472 dellin@clackamas.us
-----------	--

For Metro: Jon Williams, Principal Development Project Manager  
Metro  
971-409-2075  
Jonathan.Williams@oregonmetro.gov

Metro and HACC may each designate an additional or replacement Project Manager by providing written notice to the other party.

3. Mutual Obligations of both HACC and Metro. The Parties and their respective Project Managers will collaborate to oversee the successful implementation of the Project as follows:

- (a) Selection of Consultants. For consultants selected after execution of this contract, the Project Managers will work together to identify consultants best qualified to perform the Scope of Work, attached hereto as **Exhibit B**. The Project Managers and any additional reviewers selected by the Parties will jointly review proposals from consultants and select a mutually agreeable consultant team to perform the work required to successfully complete the Project.
- (b) Schedule of Milestones. The Parties have agreed to a preliminary schedule of milestones for completion of the Project, which is attached hereto as **Exhibit C** ("Schedule of Milestones"). The Parties agree that their respective Project Managers may prepare a revised schedule of Milestones that will provide more detailed performance timelines for the Project, including specific consultant and/or HACC deliverables for each Milestone, and establishing the amount of Grant Funds to be disbursed by Metro upon satisfactory completion of each Milestone. The Parties agree that once the Milestones are supplemented and revised by the Project Managers in accordance with this subsection, **Exhibit C** shall be automatically amended and the revised Milestones will become final and binding on the Parties unless and until later amended as allowed under paragraph 10 of this Agreement.
- (c) Project Committee(s). The Project Managers will jointly determine the role of the Project steering/technical/advisory committee(s), if any, and the composition of such committees or other bodies. Metro's Project Manager will participate as a member of any such committee.

4. HACC Responsibilities. HACC shall perform the work on the Project described in the Grant Request, and as specified in the Milestones, subject to the terms and conditions specified in this Agreement.

- (a) Use of Grant Funds. HACC shall use the Grant Funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the Milestones as set forth in this Agreement. In the event that unforeseen conditions require adjustments to the Project scope, approach, or schedule, HACC shall obtain Metro's prior written approval before implementing any revisions to the Project.
- (b) Consultant Contract(s). After the Project Managers have selected the consultant team and completed a revision of the Milestones as described above in section 3, the County shall enter into a contract(s) with the selected consultant team to complete the work as described in the Milestones as revised. The contract(s) entered into by the County shall reference this agreement and reflect the Scope of Work and the Milestones, as revised.



(c) Submittal of Grant Deliverables. Within 30 days after completing each of the Milestones, HACC shall submit to Metro all required deliverables for such Milestone, accompanied by an invoice describing in detail its expenditures as needed to satisfy fiscal requirements. Deliverables must be submitted to Metro as outlined in the Milestones, as revised; HACC shall not submit additional deliverables and invoices to Metro for later Milestones until Metro has reviewed and approved all prior deliverables under paragraph 5 of this Agreement.

5. Metro Responsibilities. Metro's funding commitment set forth in this Agreement shall be fulfilled solely through CET funds; no other funds or revenues of Metro shall be used to satisfy or pay any CET grant commitments. Metro shall facilitate successful implementation of the Project and administration of Grant Funds as follows:

(a) Advisory Role. The Metro Project Manager shall take an active role as part of the Project Advisory Team and at the request of HACC Project Manager will review and comment on draft project documents to communicate any concerns prior to the formal submission of the deliverables for each Milestone.

(b) Review and Approval of Grant Deliverables. Within 15 days after receiving HACC submittal of deliverables as set forth in the Milestones (as revised), Metro's Project Manager shall review the deliverables and either approve the submittal, or reply with comments and/or requests for further documentation or revisions that may be necessary. The Metro Project Manager shall determine whether the deliverables submitted are satisfactory in meeting the Scope of Work and the applicable Milestones.

(c) Payment Procedures. Subject to the terms and conditions in this Agreement, Metro shall reimburse HACC for its eligible expenditures for the applicable deliverable as set forth in Revised Exhibit C within 30 days following the Metro Project Manager's approval of deliverables, invoices and supporting documents.

6. Project Records. HACC shall maintain all records and documentation relating to the expenditure of Grant Funds disbursed by Metro under this Agreement, as well as records and documentation relating to the financial match being provided by HACC for the Project. Records and documents described in this section shall be retained by HACC for three years from the date of completion of the Project, expiration of the Agreement or as otherwise required under applicable law, whichever is later. HACC shall provide Metro with such information and documentation as Metro requires for implementation of the grant process. HACC shall establish and maintain books, records, documents, and other evidence in accordance with generally accepted accounting principles, in sufficient detail to permit Metro or its auditor to verify how the Grant Funds were expended, including records demonstrating how HACC matching funds were expended, if applicable.

7. Audits, Inspections and Retention of Records. Metro, together with its auditors and representatives, shall have reasonable access to and the right to examine all HACC records with respect to all matters covered by this Agreement during normal business hours upon three business days' prior written notice to HACC. The representatives shall be permitted to audit, examine, and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls and other matters covered by this Agreement. All documents, papers, time sheets, accounting records, and other materials pertaining to costs incurred in connection with the Project shall be retained by HACC and all of their contractors for three years from the date of completion of the Project, or expiration of the Agreement, whichever is later, to facilitate any audits or inspection.



8. Term. Unless otherwise terminated under paragraph 9, this Agreement shall be effective on the last date it is executed by the parties below, and shall be in effect until all Milestones and deliverables have been completed, all required documentation has been delivered, and all payments have been made as set forth in the Milestones, as revised.

9. Termination. Metro may terminate this Agreement and cancel any remaining Grant Fund payments upon a finding by the Metro Chief Operating Officer that HACC has abandoned its work on the Project or is otherwise not satisfying its obligations under this Agreement regarding the requirements of the grant.

10. Amendment. This Agreement may be amended only by mutual written agreement of the Parties.

11. Other Agreements. This Agreement does not affect or alter any other agreements between Metro and HACC.

12. Waiver. The Parties hereby waive and release one another for and from any and all claims, liabilities, or damages of any kind relating to this Agreement or the Grant Funds.

13. Authority. HACC and Metro each warrant and represent that each has the full power and authority to enter into and perform this Agreement in accordance with its terms; that all requisite action has been taken by HACC and Metro to authorize the execution of this Agreement; and that the persons signing this Agreement have full power and authority to sign for HACC and Metro, respectively.

14. Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed an original and together shall constitute a single document. Electronic signatures, as well as copies of signatures sent by facsimile or electronic transmission, shall be deemed original signatures for all purposes and shall be binding on the Parties.

*[Signature Page Follows]*

**METRO**

**HOUSING AUTHORITY OF CLACKAMAS COUNTY**

By: \_\_\_\_\_  
Marissa Madrigal  
Chief Operating Officer

By: \_\_\_\_\_  
Housing Authority Board Chair

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

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

Approved as to Form:

Approved as to Form:

By: \_\_\_\_\_  
Carrie MacLaren  
Metro Attorney

By: Andrew R Naylor  
Andrew R Naylor (Dec 18, 2023 11:37 PST)  
Andrew Naylor  
Assistant County Counsel

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

Date: 12/15/2023

Attachments:

- Exhibit A – Grant Request
- Exhibit B – Request for Proposals and Consultant Scope of Work
- Exhibit C – Schedule of Milestones

## 2040 Planning and Development Grant Application | Equitable Development

**Project:** Clackamas Heights Redevelopment 2023

**Funds requested:** \$375,000

### **Project purpose, regional impact and equity benefits**

1. Describe the proposed project and the specific goals to advance equitable development in your community. Who are the project partners and why is this work a priority? Explain how the project will facilitate or implement community development plans and/or projects that are aligned with the region's 2040 Growth Concept, meaningfully advance racial equity and deliver benefits to historically marginalized populations.

The Clackamas Heights Redevelopment will provide a comprehensive, equity-focused redevelopment strategy for a public housing community that is owned and operated by the Housing Authority of Clackamas County (HACC). Located in Oregon City, Clackamas Heights is home to 212 vulnerable low income residents who would face tremendous hardship finding housing in the private market.

Clackamas Heights includes 100 units of single story, single-family homes and duplexes. Built in 1942, Clackamas Heights is among the oldest public housing in Oregon. The units were originally built as temporary housing for the local workforce and constructed without foundations. Located in Oregon City's Park Place neighborhood and situated on nearly 17 acres, Clackamas Heights presents an incredible opportunity to replace aging infrastructure and increase housing density. HACC's goal is to replace the near-obsolete, low-density housing with new housing that is both durable and sustainable and built at a higher density that will meet the needs of a diverse mix of households and incomes.

Remarkably, 67% of Clackamas Heights residents have lived there for 5 years or more and 40% have lived there 10 or more years. Despite the dilapidated state of the existing housing, many people stay there because they have no other option. HACC understands that redevelopment of the site will be disruptive to the residents but it can no longer provide decent and safe rental housing under Section 9 (Public Housing). Repositioning and redevelopment of the site is the only feasible way for HACC to provide safe and sustainable housing to its residents.

While HACC can't prevent the disruption redevelopment will cause, it hopes to alleviate the worst of it through careful planning and by providing residents and the community the opportunity to shape the redevelopment. By providing opportunities for the community to influence decisions made during the planning process, HACC hopes to ensure that the perspectives of diverse communities—like those residing in and around Clackamas Heights—are more fully represented in planning decisions.

HACC and its partners are dedicated to understanding past and current outreach, participation barriers, and the challenges faced by historically excluded and underrepresented groups. The feedback received will be used to inform not only the design of the community, but future policies and practices that are implemented in order to make the community more successful.

HACC's goal for the project is to develop a viable and equity-centered redevelopment plan, vetted through an extensive community engagement process. In turn, this will create a revitalized and vibrant community that preserves and rebuilds existing affordable housing while creating expanded housing opportunities and options.

HACC will serve as the lead project manager, overseeing and coordinating with the consultant teams, communicating with government and community stakeholders, and convening and supporting



## 2040 Planning and Development Grant Application | Equitable Development

community meetings. HACC is working with its Resident Advisory Board (RAB) to create a Community Advisory Committee (CAC). The CAC will engage with HACC and the design team in special meetings to provide input, influence design decisions, and develop equity-focused programming that can be incorporated into the redevelopment of Clackamas Heights. These meetings and resulting conversations, voiced by people with lived experiences and diverse backgrounds, will endeavor to improve opportunities, outcomes, and the overall quality of life for historically marginalized households and people of color in the community.

Through a competitive procurement process, HACC selected Bora and PLACE (B+P) to conduct the initial concept planning for the site. An award of Metro 2040 Grant funds will allow HACC to enter into contract with B+P to create a more profound equitable redevelopment plan for the site, as well as to offer meaningful financial stipends in efforts to reduce barriers to those participating.

Together, B+P have completed over 25 housing development plans, including 5,000+ dwelling units ranging from new construction to complex renovations. B+P included the following team and consultants in their proposal: Bora (Architecture + Interiors), PLACE (Landscape Architecture), The Bookin Group (Land Use /Entitlements), Humber Design Group (Civil Engineering), Kittleston + Associates, Inc. (Traffic Engineering), Biohabitats, Inc. (Ecological Consulting, Green Infrastructure), and Cascadia Partners (Community Engagement).

Other community partners and stakeholders include members of the neighborhood and communities surrounding the site, Oregon City elected officials and Community Development staff, the Housing Authority Board of County Commissioners, OHCS, and Metro.

This equitable redevelopment project advances Metro's 2040 Growth Concept by exemplifying the Urban Design component of Neighborhoods. Under this component, Metro acknowledges that most existing neighborhoods will remain the same, though it does also express redevelopment can occur in a way to better utilize vacant land or under-used buildings to achieve a mix of uses and housing types. The project also aligns with several policies of the 2040 Growth Concept: safe and stable neighborhoods for families; compact development that uses land and money efficiently; and housing for people of all incomes in every community. The Clackamas Heights Redevelopment will lead to the redevelopment of an underutilized site and provide increased density, expanded housing options for a range of incomes levels, and enhanced amenities.

### Community demographics

2. Provide demographic information including race, ethnicity, age, and income of the neighborhood or community that will be affected by the project. Indicate the data source and describe how the project geography relates to the data provided.

Clackamas Heights (CH) is currently home to 212 residents with an average household size of two people. This is slightly lower than the census tract (CT) 223.01 it is in, which is 2.54 people. Clackamas Heights residents and the population of the larger census tract are similar in that approximately 86% of their populations identified as white.

There are notable distinctions between Clackamas Heights and its overall census tract. The most prominent being the distribution of households. 81% of Clackamas Heights residents have incomes below \$25,000, compared to just 17.2% of the households in the overall census tract. 82% of Clackamas Heights residents are considered extremely low income (0-30% of area median income), 9% very are low

## 2040 Planning and Development Grant Application | Equitable Development

income (31-50% AMI) and 6% are low income (51-80% AMI). Residents of Clackamas Heights have an average annual income of \$17,520, which is significantly lower than the overall median income of \$73,520. This is considerable, especially when 7% of CH residents identify as Black/African American (versus 1% in the 223.01 census tract), 36% are ages 0-17 (compared to 23% of those ages 0-19 in CT 223.01). Through redeveloping Clackamas Heights, these and other vulnerable populations will have greater access to meaningful amenities and resources, a step towards building economic and social capital for themselves and future generations.

According to the Oregon City Housing Needs Analysis (HNA)(December 2021), about 50% of Oregon City's renters are cost burdened. Oregon City is one of the least affordable cities for homeownership in the Portland region, meaning that households at middle and high incomes (between \$74,000 to \$110,000) are less able to afford housing in Oregon City. To accommodate the city's forecasted household growth, Oregon City needs to plan for 7,435 new dwelling units between 2021 and 2041. For context, a household must earn at least \$28.75 per hour to afford a two-bedroom unit in Clackamas County. Before taxes, a full-time job at \$28.75 per hour is an annual salary of \$59,800. A household would need to have income of about \$60,000 (about 65% of MFI) to afford the average asking rent for multifamily housing of nearly \$1,350, plus basic utilities like power, heat, and water.

### Team capacity and experience

3. Identify the roles that lead government staff and key project partners will play to implement the project and describe their qualifications and experience. Identify the roles and necessary expertise of any consultants to be hired with grant funds.

#### **Housing Authority of Clackamas County - Project Management**

Devin Ellin, *Lead Project Manager* & Bayley Boggess, *Project Manager*

**Roles and Experience:** Project Managers will coordinate and ensure all deliverables for the Concept Plan; select and coordinate project team meetings; oversee involvement by other Housing Authority departments, including Resident Services and Property Management; organize community engagement process; and serve as liaisons to the public. HACC development staff have over 20 year combined experience developing affordable housing. Devin and Bayley have overseen the development of several Housing Authority projects including Tukwila Spring and the Redevelopment of Hillside Park. HACC declined to utilize the 2040 grant awarded to the Clackamas Heights Redevelopment in 2018 because it did not have sufficient staff capacity at that time. In light of the passing of the Metro Affordable Housing Bond, which designated HACC as the sole implementation partner for Clackamas County, HACC was not comfortable moving forward with both Hillside Park and Clackamas Heights development efforts. With the Metro Housing Bond program well underway and Hillside Park moving into construction next year, HACC is well situated to undertake the Clackamas Heights redevelopment project.

#### **Brawner consulting - Finance and Development Consultants**

Jim Brawner, *President*; Zak deGorgue, *Senior Development Manager*; Matt Chantry, *Director of Development*

**Roles:** Brawner is a national real estate consulting firm with over 25 years of experience specializing in repositioning, acquisition, rehabilitation and development of affordable multifamily housing and HUD properties.

#### **City of Oregon City - Community Development Department**

Aquilla Hurd-Ravich, *Director of Community Development*; Jude Thaddaeus, *Assistant Planner*, Josh Wheeler, *Assistant City Engineer*

## 2040 Planning and Development Grant Application | Equitable Development

**Roles:** To assist with analysis and coordination of development plans and strategies to ensure compliance with City code and policy; ensure that development goals align with affordable housing production and economic development benchmarks for the City; and to participate in technical advisory meetings and assist with neighborhood and stakeholder outreach.

### **Bora + PLACE - Planning and Design Leads**

**Bora:** Architecture and Interiors - Amy Donohue, AIA, NOMA, LFA, *Principal in Charge*, Leslie Cliffe, AIA, LEED AP, *Project Manager*, Brian Squillace, AIA, LEED AP, *Project Designer* **PLACE:** Landscape Architects - Mauricio Villarreal, PLA, *Landscape Architect*, Paula Barreto, *Landscape Designer*

**Roles & Experience:** Bora + PLACE and their team of consultants will oversee Concept and Land Use Planning, Architecture and Engineering, Sustainability and Energy Efficiency Integration, Community Needs Assessment and Analysis, and Community Engagement.

**Relevant Project Experience:** Ellington Apartments Development Plan, Portland Housing Bureau, Portland, OR; Peaceful Villa Redevelopment, Home Forward, Portland, OR; Elmonica Station, REACH CDC, Beaverton, OR; Dartmouth Crossing Phases 1-3, REACH CDC, Portland, OR

### **Bora + PLACE – consultant team**

#### **The Bookin Group - Land Use and Entitlements**

Debbie Cleek, *Principal/Senior Planner*; Chris Hageman, PhD, AICP, *Principal/Senior Planner*

**Relevant Project Experience:** Tukwila Springs, Gladstone, OR; Hillside Park Master Plan, Milwaukie, OR; Marylhurst Commons, Lake Oswego, OR

#### **Humber Design Group - Civil Engineering**

David Humber, PE, LEED AP, *Principal in Charge*; Kristian McCombs, PE, *Project Manager*; Camille Morgan, El, Sr. *Project Designer* **Relevant Project Experience:** Hillside Park Master Plan, Milwaukie, OR

#### **Kittleson & Associates, Inc. - Traffic Engineering**

Julia Kuhn, PE, Sr. *Principal Engineer*

**Relevant Project Experience:** Kerr Housing, Albertina Kerr, Gresham, OR; Willow Creek Housing, DBG Properties, Hillsboro, OR; Providence Supportive Housing, Medford, OR

#### **Biohabitats, Inc. - Ecological Consulting and Green Infrastructure**

**Relevant Project Experience:** Rose Villa Senior Living, Portland, OR; Aegis Lake-Union Senior Housing Development, Water Infrastructure; Planning + Design, Seattle, WA; Barkley Village Mixed-use Neighborhood Development, Bellingham, WA; Quigley Farm – Green Neighborhood Planning / Wastewater Design, Hailey, ID

#### **Cascadia Partners – Community Engagement and Needs Analysis**

**Relevant Project Experience:** Dartmouth Crossing Feasibility Study, REACH CDC, Tigard, OR; Vance Properties Development Plan, Multnomah County, Gresham, OR; Walnut Park Feasibility Study, Multnomah County, Portland, OR; Fourth Plain Commons, Vancouver Housing Authority, Vancouver, WA

### **Achievable outcomes**

4. What is the extent of the project team’s authority to implement your proposed project, make policy, or commit investments? What governing bodies, organizations or private parties will have to act to ultimately deliver project results and anticipated community benefits? Describe how these influential entities or sponsors will be informed or involved over the course of the project to cultivate their support so that the project outcomes are achieved.



## 2040 Planning and Development Grant Application | Equitable Development

The main government agency stakeholder in the project is the Housing Authority itself, which holds site control and ownership of the Clackamas Heights property. The Housing Authority will be the lead in securing funding for development implementation. It also has the ability to make policy and commit funds.

In 2022, HACC became one of 126 Moving to Work (MTW) public housing authorities nationwide. With this designation, HACC is allowed greater flexibility to create policies that support residents and more flexibility to use and commit funds to increase housing choices for low-income families. In addition, HACC is Clackamas County's Local Implementation Partner for the Metro Affordable Housing Bond program. In its Local Implementation Strategy, HACC committed more than half of its housing bond resources to repositioning its public housing portfolio.

HACC has experience creating public housing redevelopment plans, rezoning public housing sites and receiving entitlements, and working with HUD through the repositioning process. HACC's Hillside Manor public housing development completed a RAD repositioning in 2021 and Hillside Park recently received Section 18 approval from HUD and is on track to break ground on its Phase 1 redevelopment work next year (2024). The success of large scale redevelopment projects like Clackamas Heights hinge on strong partnerships.

HACC's governing body, the Housing Authority Board of County Commissioners, has pledged their support for the project. The Housing Authority Board will have an opportunity to weigh in on the process and the proposed plan, and the Housing Authority will request a Board Resolution to accept the development plan and its recommended development objectives.

The U.S. Department of Housing and Urban Development (HUD) will be the approval body for any decisions that lead to the alteration, demolition or new construction of housing on the property.

The City of Oregon City will be the entity responsible for approval of any land use decisions. City staff from Oregon City's departments of Community Development, Planning, and Public Works will all be involved in the planning process to offer guidance on land use strategy and infrastructure coordination as the preferred design concept is developed.

One of the first priorities of HACC's community outreach plan will be engaging with the surrounding community and neighborhood associations. Other stakeholders involved in delivering the project and anticipated community benefits include HACC's Resident Advisory Board, the CAC, HACC's resident services team, other affiliated service providers, Bora + PLACE and related sub-consultants, HACC's financial and development advisors, the to be selected construction team, Metro, OHCS, and HUD.

HACC will keep these stakeholder and sponsors informed and involved over the course of the project through a variety of methods. These include, but are not limited to, regular progress reports, board updates, stakeholder listening sessions, neighborhood association presentations, a project website, a project listserv, and a dedicated inbox for asking questions related to the Clackamas Height's Redevelopment Project: [CHRedevInfo@clackamas.us](mailto:CHRedevInfo@clackamas.us).

### Scope of Work

5. Succinctly outline your approach to the project and the major project elements and deliverables you envision. Provide a bulleted list outline of the components or phases of work, the tasks and partners involved in each phase or element, the key work products and the general timeframe to complete the project.

## 2040 Planning and Development Grant Application | Equitable Development

The creation of a physically and financially viable strategy for the equitable redevelopment of Clackamas Heights will include two major phases with corresponding project deliverables to be completed by consultant teams over the course of a 14 month timeframe. The completed plan will reflect a shared-community vision for redevelopment of the site that incorporates an increased number of housing units and a design concept driven by best practices in community development, sustainability, and community engagement. The specific scope of work for each consultant team includes the following:

### **Phase #1: *Concept Planning and Financial Feasibility Analysis*** (Winter 2023)

The Development and Financial Feasibility Analysis will be conducted by Bora + PLACE and consultants and Brawner Consulting. Deliverables:

- Initial Concept Planning and Financial Analysis - In this initial phase, Bora + PLACE will study the site and meet with the Oregon City planning officials to determine what types of development and density are achievable at the site. Brawner will analyze the options from a financial feasibility perspective.
- Needs Assessment - The needs assessment will be completed by Cascadia Partners in conjunction with the development of the preferred site and design plan. This will be an iterative process involving input and preferences from the Housing Authority, project partners, residents, and the other consultant teams. The assessment will consider and weigh options for unit sizes, design and building types, unit count, site amenities, infrastructure upgrades, and phases of development.
- Preferred Concept Financial Analysis – Once a preferred design concept is identified, Brawner will create an initial cost analysis for the redevelopment. Likely sources of funding will be identified and a phasing schedule recommended.
- Development Sources and Uses – In the final phase of the analysis, Brawner will produce a detailed and viable development sources and uses proforma for the project that is tested against funding constraints and opportunities.

### **Phase #2: *Architecture and Engineering: Preferred Site Plan and Equitable Development Plan*** (Spring 2024– Spring 2025) The design team (Bora + PLACE will) create a Site Plan for redevelopment of the site Deliverables:

- Site Survey and Assessments - Determination of site boundaries and features, assessment of conditions including residential buildings and infrastructure; preliminary zoning and land use analysis; recommendations for alignment with City of Oregon City's zoning code and comprehensive plan.
- Program Investigation and Preliminary Project Goals - Launch community engagement to explore program goals and development options. Community engagement will include resident and community meetings, design workshops, and include an ongoing feedback loop with the Community Advisory Committee (CAC). Additional outreach and engagement strategies may include: informational fliers, focus groups, surveys, town hall meetings, one-on-one sessions, trained community advocates, and participatory design sessions.
- Design Workshop Conduct community workshops to refine design and development priorities. Success under these community engagement activities will be measured by the diversity and quantity of stakeholder input, the tangible translation of desires into program elements, design principles, spatial arrangements, and phasing plans, as well as the integration of community preferences into the final design concept.
- Develop Preferred Development Plan – Develop a preferred development plan for the site; final identification and recommendation of zoning changes and land use process.

## 2040 Planning and Development Grant Application | Equitable Development

### Proposed project budget

6. Use the budget template provided to show the estimated project costs by major phase or component. The budget table should align with the project scope of work and include major tasks or elements identified in question #5. Indicate estimated costs for consultant work as well as other direct project expenses. In the space below, describe the methodology used for estimating project costs, and identify any additional funds (if any) that have been pledged by project partners or other sources.

The estimated costs shown in the budget template are derived from cost estimates received from Bora + PLACE as a result of a competitive selection process. If HACC is awarded a 2040 planning grant from Metro, it will be able to move forward with contracting with Bora + PLACE for the redevelopment planning work. HACC has entered into a contract with Brawner to provide financial and development consulting to support the Housing Authority's repositioning and redevelopment work. Brawner's costs related to the Clackamas Heights Redevelopment are not included in the 2040 grant budget and will be paid for using Housing Authority funds.

While funds have not yet been formally awarded, HACC has approximately \$18 million in Metro Affordable Housing Bonds remaining that are pledged to fund eligible capital costs associated with the repositioning of Housing Authority public housing projects like Clackamas Heights. In addition, HACC staff are working with Clackamas County's Community Development department to secure HOME and CDBG funds to support capital costs for the project. An award of Metro 2040 Planning and Development Grant funds would provide HACC with a crucially important source that can fund planning and pre-development activities which are not eligible for other identified sources.



**2040 Planning and Development Grant Application  
Proposed project budget | All Application Types**

**Project Name:** Clackamas Heights Redevelopment

**Grant Funds Requested:** \$375,000

**Other funds Pledged:** Metro Affordable Housing Bonds (up to \$18 million available)

PROJECT COMPONENT  (Phase, element, deliverable, etc.)	CONSULTANT FEES	CBO PARTICIPATION AND/OR COMMUNITY LIAISON	OTHER DIRECT PROJECT COSTS	TOTAL
Technical planning and predevelopment consultant work	\$ 361,000			\$ 361,000
Community Advisory Committee participation stipends		\$ 12,500		\$ 12,500
Community Engagement - materials, printing & translation services			\$ 1,500	\$ 1,500
<b>TOTAL PROJECT BUDGET</b>				\$ 375,000

## **2040 Planning and Development Grant Application | Equitable Development *Local Government Letter of Commitment***

HACC staff spoke with Serah Breakstone on 8/8/23, regarding the concern that the local government commitment letter from Clackamas County would not be available before the submission deadline, though it would be executed the following week (of 8/14/23). To note, the letter was formally approved during the Board of Clackamas County's Business Meeting on 8/10/23.

Serah confirmed to HACC staff that HACC's 2040 Grants Cycle 11 application (for Clackamas Heights Redevelopment work) could still be submitted while waiting for the application to be formally executed, which will then be submitted promptly.

Following this page is the formal submission packet to the Board of Clackamas County for approval, which was also initially accepted by the Board of Clackamas County at Issues on 8/8/23.

08/10/2023

BCC Agenda Date/Item: \_\_\_\_\_

Housing Authority Board of Commissioners  
 Clackamas County

**Approval to apply for a 2040 Planning & Development Grant and provide a letter in support of the Clackamas Heights Redevelopment project and 2040 Grant application. Total value is \$375,000.00 to expend over 24 months. Funding is through Metro’s Construction Excise Tax. No County General Funds involved.**

<b>Previous Board Action/Review</b>	0316/203 – HACC Annual Plan 03/02/2023 – Development Update Memo 03/09/2022 - Policy Session: “Repositioning Public Housing”		
<b>Performance Clackamas</b>	This funding aligns with the County’s strategic priority to ensure safe, healthy, and secure communities by increasing the inventory of affordable housing units in Clackamas County.		
<b>Counsel Review</b>	No	<b>Procurement Review</b>	No
<b>Contact Person</b>	Devin Ellin, Director of Housing Development, HACC	<b>Contact Phone</b>	971-227-0472

**EXECUTIVE SUMMARY:**

The Housing Authority of Clackamas County (HACC) is requesting authorization to apply for the Metro 2040 Planning & Development Grant (Cycle 11) in support of the concept planning for the redevelopment of Clackamas Heights. This funding opportunity will be limited to grants and will not involve any County general funds.

Metro’s 2040 Growth Concept Planning & Development grants are significant, multi-year grants that encourage community and stakeholder involvement in the planning process for redevelopment projects like Clackamas Heights. If awarded, these grant funds would support the community engagement and the planning and pre-development phase of the redevelopment project.

The redevelopment of Clackamas Heights aligns with the Housing Authority and the County's Performance Clackamas goal of ensuring safe, healthy and secure communities by replacing 100 units of near-obsolete public housing with 200+ units of newly constructed affordable housing.

If awarded, additional documents will be required to accept the 2040 Planning & Development grant funds, including an intergovernmental grant agreement with Metro.

**RECOMMENDATION:** Staff recommends that the Board approve HACC’s request for approval to apply for a 2040 Planning & Development Grant and provide a letter in support of the Clackamas Heights Redevelopment project and 2040 Grant application.

For Filing Use Only



Respectfully submitted,

*Rodney A. Cook*

Rodney A. Cook  
Director of Health Housing and Human Services

August 8, 2023

Review Committee  
2040 Planning and Development Grants  
Metro Regional Government  
600 NE Grand Ave  
Portland, OR 97232

RE: Letter of Support for Clackamas County Proposal: Clackamas Heights Master Plan

Dear Metro 2040 Grants Review Committee,

On behalf of the Board of Commissioners of the Housing Authority of Clackamas County, I am writing in support of the grant proposal submitted by the Housing Authority of Clackamas County to support development planning for the redevelopment of the Clackamas Heights public housing complex in Oregon City.

The Housing Authority of Clackamas County, in partnership with its Resident Advisory Board, is seeking Metro 2040 grant funds to support the development and creation of a Concept Plan for its Clackamas Heights redevelopment project. This project represents an important community investment and planning effort that will help to leverage additional resources for affordable housing development within Clackamas County.

The 2040 grant funds requested will help HACC deliver equitable planning outcomes to ensure that this community investment project benefits historically marginalized communities with the greatest need and meaningfully engages them in the process.

This project represents significant community partnerships, opportunities for engagement in planning efforts, and the strong likelihood of development implementation. Given the merits of the proposal, the Board of Commissioners of the Housing Authority of Clackamas County is pleased to offer its full support for the Clackamas Heights Redevelopment application.

Tootie Smith, Chair Board of Commissioners  
of the Housing Authority of Clackamas County

*Healthy Families. Strong Communities.*



.....

# 2040 Planning & Development Grants Application Handbook

.....

Cycle 11 | May 2023

## Grant timeline and key dates - 2023

<b>May24</b>	Application materials for Cycle 11 grants available.
<b>June 7</b>	Optional in-person open house for interested parties. 9:30 – 11:00 AM at Metro Regional Center.
<b>June 23</b>	Deadline to submit letters of interest.
<b>July 14</b>	Metro staff provides feedback to applicants who submitted a letter of interest.
<b>July 19</b>	Optional meetings with Metro staff to discuss feedback (in-person and virtual options available, must be requested by applicant).
<b>Aug11</b>	Deadline to submit final applications for Cycle 11 grants.
<b>Aug-Sept</b>	Metro staff and Screening Committee review and evaluate applications.
<b>Sept 8</b>	Metro staff will notify short-listed applications and invite them for interviews with the Screening Committee.
<b>Sept 19</b> <i>(tentative)</i>	Interviews with Metro staff and Screening Committee <b><i>(all applicants should hold this date for potential interviews)</i></b> .
<b>Sept 29</b>	Metro notifies selected applicants.
<b>Oct-Nov</b>	Metro staff works with selected applicants on project scoping and draft grant agreements, including requests for proposals for project consultants.
<b>November</b>	Metro Council action to award Cycle 11 grants.
<b>Nov – Dec</b>	Execution of inter-governmental agreements between Metro and grantees; initiate procurement/selection of project consultant teams.

**Note:** Concept Planning grants will be processed on an expedited timeline if needed to meet deadlines associated with the 2024 urban growth decision (<https://www.oregonmetro.gov/urban-growth-boundary>).



# Table of contents

<b>Metro staff contacts.....</b>	<b>4</b>
<b>Program Overview .....</b>	<b>4</b>
PROGRAM CONTEXT .....	4
FUNDING AVAILABILITY AND GRANT CATEGORIES .....	5
GRANT CATEGORIES: SPECIFIC REQUIREMENTS AND CRITERIA.....	6
ELIGIBLE GRANT EXPENSES.....	10
GRANT APPLICATION REVIEW PROCESS .....	10
<b>Letters of interest .....</b>	<b>12</b>
<b>How to submit your application .....</b>	<b>13</b>
ZOOMGRANTS APPLICATION SYSTEM .....	13
FINAL GRANT APPLICATION AND REQUIRED SUBMITTALS .....	13

# Metro staff contacts

## Applications and general information:

- **Laura Dawson Bodner**  
[2040@oregonmetro.gov](mailto:2040@oregonmetro.gov)

## 2040 Planning & Development Grants Manager:

- **Serah Breakstone**  
[Serah.Breakstone@oregonmetro.gov](mailto:Serah.Breakstone@oregonmetro.gov)  
971.438.7410



## Program Overview

### PROGRAM CONTEXT

Metro's 2040 Planning & Development Grants program supports a range of local planning projects and activities. The grants help remove barriers to housing development, support economic growth, promote planning that makes land ready for development, and implement Metro's long-term plan for livable and equitable communities, outlined in the [2040 Growth Concept](#). Since 2006, Metro has awarded over \$27 million to fund more than 120 projects across the region.

Grant funds are generated from a regional excise tax on construction permits issued within the Metro service district. The tax is assessed at 0.12 percent of the total value of the improvements for which a permit is sought. Permits valued below \$100,000 and those issued to 501(c)(3) nonprofits for affordable housing projects are exempt from the tax. Permits for construction valued at more than \$10 million are assessed a flat fee of \$12,000.

The construction excise tax is administered according to Metro Code Section 7.04, which can be found here: [Metro Code](#)

The administrative rules that govern the 2040 Planning & Development Grants program can be found here under Title VII: [2040 Grants Admin Rules](#)

## FUNDING AVAILABILITY AND GRANT CATEGORIES

For the 2023 grant cycle (Cycle 11), Metro intends to award approximately \$3.0 million in grant funds. Grants will be awarded in four different categories:

- **Concept planning.** Concept planning grants facilitate planning for new urban areas on land currently designated as Urban Reserves. Concept planning efforts must plan for complete communities that comply with Title 11 of the Urban Growth Management Functional Plan.

Approximate funding in Cycle 11: **\$500,000**

- **Equitable development.** Equitable development grant projects will spur implementation of the communities envisioned by the 2040 growth concept while advancing specific equity-focused projects, programs or strategies that improve opportunities and quality of life for people of color and historically marginalized communities.

Approximate funding in Cycle 11: **\$1,250,000**

- **Community engagement.** Community engagement grants are intended to help local governments expand access to opportunities, influence, and decision-making in public planning processes throughout the region.

Approximate funding in Cycle 11: **\$250,000**

- **Industrial land readiness.** These grants will fund work with city and county partners to advance industrial site readiness through site-specific, industry-specific, or obstacle-specific planning efforts.

Approximate funding in Cycle 11: **\$1,000,000**

**GRANT CATEGORIES: SPECIFIC REQUIREMENTS AND CRITERIA**

<b>CONCEPT PLANNING GRANTS</b>	
<b>CONCEPT PLANNING GRANTS</b>	<p><b>General requirements</b> Concept planning facilitates the future development of complete communities and supports work by cities and counties to comply with Title 11 of the Urban Growth Management Functional Plan. This type of grant is intended solely for concept planning in urban reserve areas. Proposals will specifically address how they will seek to comply with Title 11. Award of a concept planning grant does not indicate a commitment by Metro to add the urban reserve area to the UGB in the next growth management decision. Projects will include planning for a range of land uses, necessary infrastructure services and associated cost estimates, and proposed methods to finance the systems and services. Projects must also include a robust community engagement strategy demonstrating best practices for advancing racial equity and involving historically marginalized communities in the planning process.</p>
	<p><b>Eligible applicants</b> Cities and counties that have urban reserves within their planning area are allowed to submit one concept planning application per grant cycle.</p>
	<p><b>Commitments and contributions</b> Applications should reflect commitment by the applicant and key project partners to participate in the planning effort. All grant requests must include a resolution of support by the governing body that explicitly confirms the availability of adequate staff resources to successfully implement the proposed project. The resolution will also outline any additional financial contributions the applicant and project partners have committed to the project.</p>
	<p><b>Evaluation criteria</b> Proposed projects must demonstrate consistency with Metro Code Section 3.07.1110 while considering activities to achieve a range of housing types and employment opportunities, all served by a well-connected multi-modal transportation system with access to parks and recreation. Projects should help realize community plans and goals and may maximize existing community assets such as parks, natural features, or nearby employment areas. Projects will also be evaluated upon the extent to which they utilize best practices for public involvement, including strategies for meaningfully engaging neighbors, businesses, property owners, key stakeholders, and historically marginalized communities, including people with lower incomes and communities of color.</p>



EQUITABLE DEVELOPMENT GRANTS	
<b>EQUITABLE DEVELOPMENT GRANTS</b>	<p><b>General requirements</b></p> <p>Equitable development grants are significant, multi-year grants that will spur implementation of the communities envisioned by Metro’s 2040 Growth Concept* while advancing specific equity-focused projects, programs or strategies that improve opportunities and quality of life for people of color and historically marginalized communities. Projects may be sitespecific development or redevelopment planning projects located in a center, main street, corridor, station area, or employment area. Eligible projects may include area-specific community development plans, parking studies, climate strategies, creation of funding tools, or economic development strategies that help local cities and counties and their partners build more equitable communities and create pathways to prosperity.</p> <p>Please note that housing projects that will be seeking Metro Affordable Housing Bond funding are <b>not</b> eligible to receive 2040 Planning &amp; Development Grant funds for pre-development planning.</p> <p>*Link to the 2040 Growth Concept: <a href="#">2040 Growth Concept</a></p>
	<p><b>Eligible applicants</b></p> <p>Project teams must include at least one city or county partner and at least one community partner. Community partners may be non-profit or private organizations or individual property owners. Other local governments, as defined in ORS 174.116, may also apply for grants if they are partnered with a city or county government and at least one community partner. Most local governments may submit only one equitable development grant request per cycle. However, the City of Portland is allowed to submit up to three equitable development grant applications per cycle. The cities of Hillsboro, Gresham, and Beaverton, and Washington and Clackamas Counties will each be allowed to submit up to two equitable development grant applications per cycle.</p>
	<p><b>Commitments and contributions</b></p> <p>Applications should reflect commitment by the applicant and key project partners to participate in the planning effort. All grant requests must include a letter signed by the governing body (executed by both elected leaders and administrators) confirming support for the effort and their intent to fully fund staff resources for the project. Letters of commitment from community partners must also be included, confirming their pledge of any contributions and the nature of their involvement in the project.</p>
	<p><b>Evaluation criteria</b></p> <p>Applications will be evaluated on the extent to which the project partners present a compelling project concept with specific, achievable, and impactful outcomes. Projects must help to facilitate or implement community development plans and projects that are aligned with the region’s 2040 Growth Concept and that will meaningfully advance racial equity and deliver benefits to historically marginalized communities. Exemplary projects will deliver equitable planning and development outcomes using thoughtful, focused strategies to ensure that the benefits of community investments are delivered to populations with the greatest needs. Reviewers will also consider the extent to which the project partners have the capacity and authority to implement actions/investments as needed to successfully bring the project to fruition. Applications must demonstrate how historically marginalized communities and people of color will be meaningfully engaged in the work and how they will specifically benefit from implementation of the project.</p>

COMMUNITY ENGAGEMENT GRANTS	
<b>COMMUNITY ENGAGEMENT GRANTS</b>	<p><b>General requirements</b></p> <p>Community Engagement Grants are shorter-term grants intended to help city and county governments meaningfully involve diverse community members in planning and development decisions that help to implement the 2040 Growth Concept. The grants expand access to opportunities, influence, and decision-making in public planning processes and help to ensure that the perspective of these communities is more fully represented in planning decisions. Grants will support collaboration with community-based organizations (CBOs) around a particular process or issue and may include hiring a community member to serve as a liaison and provide input into the engagement plan, technical work, and public decision-making processes. Involvement of CBOs or liaisons in a consulting role to the city or county may be for community engagement, community organizing, project development, project implementation or advocacy related to the planning project.</p> <p>Relevant planning processes may include regional and town or neighborhood center plans; main street and corridor planning; employment area plans and strategies; plans and strategies for equitable housing; or code and policy work to align with the 2040 Growth Concept vision.</p>
	<p><b>Eligible applicants</b></p> <p>Local city or county governments may apply in partnership with a community-based organization (CBO) or they may wait to select a partner until a grant has been awarded. If a CBO(s) and local government apply in partnership, at least one CBO must have significant program experience and demonstrated success serving historically marginalized communities and people of color. Local governments may also apply without a designated community partner if they are seeking to hire a community liaison for a specific project. Community liaisons must be people of color or represent a historically marginalized community.</p> <p>Most local governments may submit only one community engagement grant request per grant cycle. The City of Portland is allowed to submit up to three community engagement grant applications per cycle. The cities of Hillsboro, Gresham, and Beaverton, and Washington and Clackamas Counties are allowed to submit up to two community engagement grant applications per cycle.</p>
	<p><b>Commitments and contributions</b></p> <p>Applications should reflect commitment by the applicant and key project partners to participate in the planning effort. All grant requests must include a letter signed by the governing body (executed by both elected leaders and administrators) confirming support for the effort and their intent to fully fund staff resources and technical/planning consultants for the project. If a CBO is designated as a partner in the application, a letter of commitment from the organization's executive must be included, confirming their intent to collaborate on the project.</p>
	<p><b>Evaluation criteria</b></p> <p>Grant applications will be evaluated based on how well the proposed activities, partnership(s), and/or community liaison will help the local government meaningfully engage historically marginalized communities including low-income individuals and communities of color. Factors to be considered include the extent to which the project approach will provide these communities true access and a voice in decision-making processes, and how public input will be incorporated to strengthen community planning and development outcomes.</p>

INDUSTRIAL LAND READINESS GRANTS	
INDUSTRIAL LAND READINESS GRANTS	<p><b>General requirements</b></p> <p>Industrial land readiness grants will fund work with city and county partners to advance industrial site readiness through site-specific, industry-specific, or obstacle-specific planning efforts. Industrial land readiness means the subject land has the regulatory structure, utilities, and transportation infrastructure planned or in place to facilitate development of industrial uses. Grant projects must produce land readiness strategies focused on a particular site or area, a particular industry in which the local jurisdiction has a competitive advantage, or a particular obstacle to development faced by multiple industrial sites in the jurisdiction, including the identification of related costs and any financial gaps for implementation.</p> <p>Grant projects should focus on land located in a designated Employment Area per the 2040 Growth Concept Map.</p> <p>Additionally, grant projects must engage with communities most impacted by the development of any site and incorporate community perspectives into plans and strategies.</p> <p><i>Note: Recipients of industrial land readiness grants will be asked to attend one or more coordination meetings to foster regional collaboration around industrial land planning. This will be reflected in the intergovernmental agreements that are drafted once grants are awarded.</i></p>
	<p><b>Eligible applicants</b></p> <p>Grant applicants must be a city or county within the Metro boundary. Applicant teams may also include community partners and other local governments (as defined in ORS 174.116). Community partners may be non-profit organizations or individual landowners.</p>
	<p><b>Commitments and contributions</b></p> <p>Applications should reflect commitment by the local government and any key project partners to participate in the planning effort. All grant requests must include a letter signed by the governing body (executed by both elected leaders and administrators) confirming support for the effort and their intent to fully fund staff resources for the planning project and anticipated implementation for industrial land readiness. Letters of support from any community partners must also be included, confirming their pledge of any contributions and the nature of their involvement in the project.</p>
	<p><b>Evaluation criteria</b></p> <p>Applications will be evaluated on the extent to which the project team presents a compelling project concept with specific, achievable, and impactful outcomes. Metro may choose to prioritize applications that most closely align with competitive industry clusters identified in the region's Comprehensive Economic Development Strategy*. Grantees are also encouraged to incorporate equity strategies into their planning effort and intended outcomes. Grant application reviewers will also consider the extent to which the project partners have the capacity and authority to implement actions/investments as needed to successfully bring the project to fruition.</p> <p>*Greater Portland Comprehensive Economic Development Strategy: <a href="#">CEDS</a></p>



## ELIGIBLE GRANT EXPENSES

Local governments are required to provide all staff time and overhead as may be needed to successfully implement the grant project and deliver the project outcomes.

Staff time for community-based organizations, individuals serving as community liaisons, or other non-profit partners consulting on grant projects may be reimbursed with grant funds. Individuals should be aware that receipt of grant funds in form of a stipend will be considered taxable income that will be reported to the IRS. Direct costs for community engagement such as materials, printing and translation services and meeting expenses are also eligible grant costs. Concept planning, equitable development, and industrial readiness grants may also cover costs associated with technical planning and/or pre-development work by consultants.

Funds from 2040 Planning & Development Grants cannot be used as support for general planning budgets, to cover certain costs of capital projects such as land acquisitions, development implementation or construction, or for the ongoing operation of organizations. Costs associated with planning or development activities which are contracted for or conducted prior to the execution of a grant agreement are not eligible for reimbursement with grant funds.

## GRANT APPLICATION REVIEW PROCESS

### CONCEPT PLANNING GRANTS

**Staff review.** Metro staff will review all final applications received by the deadline to ensure that applicants and projects meet all criteria for program eligibility. Applications not submitted and fully complete by the application deadline will not be evaluated. Applications for concept planning grants will be reviewed by Metro Planning, Development and Research Staff, who will assess the strengths and weaknesses of each application and will make a funding recommendation to the Metro Chief Operating Officer (COO).

**COO Recommendation.** The Metro COO will review the staff recommendation and will submit their final funding recommendation to the Metro Council.

**Council awards.** Following receipt of the Metro COO's recommendation, the Metro Council will review the recommendation and funding requests. The Metro Council will decide, in a public hearing, whether to approve funding of any grants, and the amount of each grant awarded.

***Note:** Concept Planning grants will be processed on an expedited timeline if needed to meet deadlines associated with the 2024 urban growth decision (<https://www.oregonmetro.gov/urban-growth-boundary>).*



## **ALL OTHER GRANTS**

**Staff review.** Staff will review full applications and forward all complete applications to the Grants Screening Committee, along with an assessment of each application's relative strengths and weaknesses. Applications not submitted and fully complete by the deadline will not be evaluated.

**Grants screening committee.** The 2040 Grants Screening Committee, appointed by the Metro COO, will review and score the applications after the initial screening by staff. Metro's administrative rules call for the Screening Committee membership to include seven to eleven private and public sector representatives with experience in a range of areas relating to urban planning, real estate, economic development, community engagement, environmental sustainability, community development, and social equity. The Screening Committee will select the strongest applicants to be short-listed and invited for an interview. Following the interviews, the Screening Committee will recommend finalists to the Metro COO.

**COO Recommendation and Council endorsement.** The Metro COO will review the Screening Committee recommendation for finalists and will forward their recommendation to the Metro Council. The Metro Council will endorse finalists in a Council work session.

**Project scoping and development.** Metro staff will closely collaborate with each of the finalists to refine the scope of work and budget for each project and develop draft grant agreements.

**Metro Council final approval.** The Metro Council will review the draft grant agreements, project scopes, and budgets and will make a final decision regarding grant awards in a public hearing.

## Letters of interest

Prospective applicants are encouraged to submit a letter of interest prior to submittal of a full application. The intent of the letters of interest is to provide Metro staff an opportunity to review proposed project ideas and give early feedback to applicants to ensure more complete applications. Metro staff will provide early feedback to applicants within 2 to 3 weeks of submittal of the letters.

Metro staff will also hold optional meetings with applicants to discuss proposed projects if requested by the applicant. To request a meeting during that time, please email Laura Dawson-Bodner at [2040@oregonmetro.gov](mailto:2040@oregonmetro.gov). Meetings will be scheduled for **July 19**; additional dates will be added if needed.

Letters of interest should not exceed two pages and should include the following information.

- ✓ The grant category and a general overview of the project
- ✓ The applicant team, including local government and community partners and their roles and responsibilities (see specific grant categories above for requirements)
  - Official letters of support from project partners are not required at this time, but please indicate that partnerships have been established and involved partners are committed to the work.
  - Please briefly describe capacity and capabilities of project partners to complete the project.
- ✓ Description of the proposed project approach and how it will generally meet evaluation criteria (see specific grant categories above for criteria)
- ✓ Estimated timeline for the work
- ✓ Initial estimate of grant amount (dollars requested)

Letters of interest are strongly encouraged but not required.

**Letters of interest should be created on the template provided and uploaded to ZoomGrants in PDF format. Templates are available on the [2040 grants webpage](#) and in ZoomGrants. See below for additional instructions regarding ZoomGrants.**

**LETTERS OF INTEREST ARE DUE JUNE 23, 2023.**

# How to submit application materials

## ZOOMGRANTS APPLICATION SYSTEM

Metro accepts grant applications via the online system ZoomGrants. Applicants may access ZoomGrants and register with the system directly at [ZG 2040 Grants Cycle 11](#). If you are new to ZoomGrants, you must create an account to get started.

If you have questions about ZoomGrants, you may use the help button at the top of each ZoomGrants page. For more information, visit [ZoomGrants University](#) or contact the ZoomGrants help desk at [Questions@ZoomGrants.com](mailto:Questions@ZoomGrants.com). To ensure you receive emails from Metro regarding your grant application, please add the email address [Notices@ZoomGrants.com](mailto:Notices@ZoomGrants.com) to your "safe senders list." A confirmation email will be sent by ZoomGrants once a letter of interest or full application has been submitted. If you do not receive a confirmation, please contact please contact Laura Dawson-Bodner by email at [2040@oregonmetro.gov](mailto:2040@oregonmetro.gov).

## FINAL GRANT APPLICATION AND REQUIRED SUBMITTALS

Final grant applications must include the materials listed below. Incomplete applications will not be evaluated.

- A. Project information.** General project information must be entered directly into ZoomGrants.
- B. ZoomGrants short questions.** There are five questions that applicants are required to complete by directly entering their response into ZoomGrants under the "Short Questions" tab.
- C. Application PDF upload.** The following materials must be combined into a **single PDF document, ordered in the sequence listed below, and uploaded** under the "Required Uploads" tab. *Please note: ZoomGrants allows document uploads to be up to 4mb in size. If your completed combined application PDF exceeds 4mb and it is not possible to reduce the file size, the combined application PDF may be split into two documents, with the location maps and optional images in the second document.*
  - 1. Project narrative.** The narrative templates (fillable Word document) for each grant category are available for download from ZoomGrants (see section titled "Templates") or from the [2040 Grants](#) web page. The template allows applicants to format responses (with headings, bullets, tables etc. as desired). Responses to the questions should demonstrate that the application meets the intent of the grant program and has the necessary commitments and partnerships in place to achieve the expected outcome within the budget and schedule proposed. Applicants should address each component of every question and respond as thoughtfully and succinctly as possible. However, it is not necessary to use the full space allotted for each answer.
  - 2. Budget table.** Applicants should prepare the project budget table Excel workbook available for download from ZoomGrants (see the "Required Uploads" tab) or from the [2040 Grants](#) web page. The project budget should be clear, cost-effective, and consistent with the approach and scope

of work outlined in the project narrative. The budget table should reflect project costs as accurately as estimates allow, but please round the total grant request up to the nearest \$100.

3. **Local government letter of commitment.** Refer to instructions above regarding requirements specific to each grant category.
4. **Community partner letter(s) of commitment.** Refer to instructions above regarding requirements specific to each grant category.
5. **Resolution of support (concept planning grants only).** All concept planning grant applications must include a resolution of support by the governing body that explicitly confirms the availability of adequate staff resources to successfully implement the proposed project.
6. **Location map.** Provide vicinity map(s), site maps, or aerial photos as applicable to show the location of the project and project boundaries. Include up to 3 pages of maps as needed.
7. **Project images.** If desired, applicants may include an additional PDF of up to 4 pages containing site photos, project plans, design images or other supplemental graphic material.

**FULL AND COMPLETE GRANT APPLICATIONS ARE DUE AUGUST 11, 2023.**

**Late or incomplete applications will not be evaluated.**



08/11/2023

Metro 2040 P&D Grants Committee  
600 NE Grand Avenue  
Portland, OR 97232-2736

Dear Metro 2040 Grant Committee,

The Resident Advisory Board (RAB) would like to express its commitment to collaborating with the Housing Authority of Clackamas County (HACC) as it moves forward with the planning and engagement process for the redevelopment of Clackamas Heights. The RAB supports the Housing Authority of Clackamas County's 2040 Equitable Development grant application and its plan to utilize an award of funds to expand access to opportunities to influence decision-making during the planning process. This will help ensure that the perspectives of diverse communities like Clackamas Heights are more fully represented in planning decisions.

The RAB has a long history of providing HACC staff with important and insightful feedback on its Five-Year and Annual Plans. These plans outline the goals, policies, rules, and requirements of the Housing Authority's operations, programs, and services. They inform HUD, families served by HACC, and members of the public of HACC's mission, goals, and objectives for serving the needs of low-income families. RAB members provide input and make recommendations on significant amendments or modifications to HACC's Annual and Five-Year Plans. HACC is committed to encouraging resident participation by providing a safe forum for RAB members to participate and make their comments and perspectives heard.

As HACC's community engagement partner, the RAB will play a key role in shaping the community, ensuring the redevelopment of Clackamas Heights creates a safe and inclusive community where residents can thrive and embrace opportunities for growth and prosperity.

The RAB representative will work with HACC's Director of Housing Development to recruit additional RAB members, current residents, and neighborhood stakeholders to participate in a Community Advisory Committee (CAC). The CAC will engage with HACC and the design team in special meetings to provide input, influence design decisions, and develop equity-focused programming that can be incorporated into the redevelopment of the 16 acre Clackamas Heights community in Oregon City. These meetings and resulting conversations, voiced by people with lived experiences and diverse backgrounds, will endeavor to improve opportunities, outcomes, and the overall quality of life for historically marginalized households and people of color in the community.

*Healthy Families. Strong Communities.*

HACC will support the CAC by administering financial stipends to participants, providing physical meeting spaces and virtual forums to convene, providing translation services and accessible materials, making staff and design team members available to provide technical information, answer questions, and talk through ideas, and offering other resources, as necessary, to ensure the CAC is informed about the process and comfortably able to share their insights and inspirations for the redevelopment.

Throughout this critical predevelopment planning and community engagement phase, the RAB and HACC's Housing Development staff commit their involvement and accept the responsibility of participating in the redevelopment planning efforts.

The RAB representative and group strongly urges Metro to support HACC as they work to protect, retain, and restore one of the metro area's most vulnerable communities and their homes.

Sincerely,



Devin Ellin (Aug 9, 2023 15:04 EDT)

**Devin Ellin**

Director of Housing Development, HACC  
[dellin@clackamas.us](mailto:dellin@clackamas.us)



Ann B Leenstra (Aug 9, 2023 11:58 PDT)

**Ann Leenstra**

Clackamas County Housing Commissioner,  
HACC Resident Advisory Board (RAB) Member,  
and Section 8 Recipient  
[pdxgrammaann@gmail.com](mailto:pdxgrammaann@gmail.com)  
[ALeenstra@clackamas.us](mailto:ALeenstra@clackamas.us)











# SIG - RAB support letter\_2023.08.11

Final Audit Report

2023-08-09

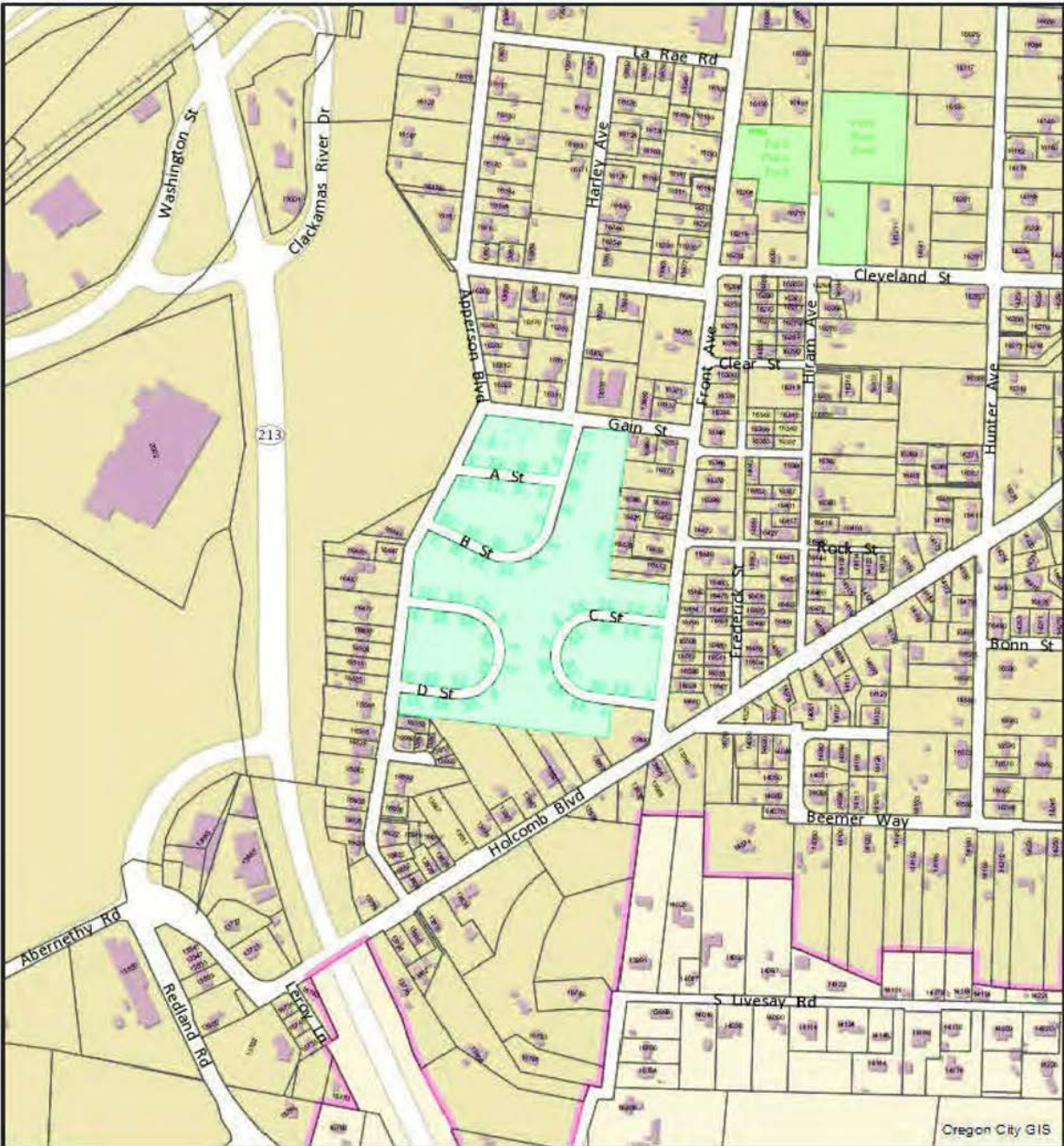
Created:	2023-08-09
By:	Bayley Boggess (BBoggess@clackamas.us)
Status:	Signed
Transaction ID:	CBJCHBCAABAAW5qRx5OczpEWqmIrd66-sQl4Ugip

## "SIG - RAB support letter\_2023.08.11" History

-  Document created by Bayley Boggess (BBoggess@clackamas.us)  
2023-08-09 - 5:38:07 PM GMT - IP address: 76.115.38.40
-  Document emailed to pdxgrammaann@gmail.com for signature  
2023-08-09 - 5:38:58 PM GMT
-  Email viewed by pdxgrammaann@gmail.com  
2023-08-09 - 6:45:13 PM GMT - IP address: 66.249.84.66
-  Signer pdxgrammaann@gmail.com entered name at signing as Ann B Leenstra  
2023-08-09 - 6:58:33 PM GMT - IP address: 73.96.32.28
-  Document e-signed by Ann B Leenstra (pdxgrammaann@gmail.com)  
Signature Date: 2023-08-09 - 6:58:35 PM GMT - Time Source: server - IP address: 73.96.32.28
-  Document emailed to dellin@clackamas.us for signature  
2023-08-09 - 6:58:37 PM GMT
-  Email viewed by dellin@clackamas.us  
2023-08-09 - 7:03:42 PM GMT - IP address: 172.224.237.32
-  Signer dellin@clackamas.us entered name at signing as Devin Ellin  
2023-08-09 - 7:04:23 PM GMT - IP address: 174.193.65.137
-  Document e-signed by Devin Ellin (dellin@clackamas.us)  
Signature Date: 2023-08-09 - 7:04:25 PM GMT - Time Source: server - IP address: 174.193.65.137
-  Agreement completed.  
2023-08-09 - 7:04:25 PM GMT



2040 Planning and Development Grant Application | Equitable Development  
Location Maps



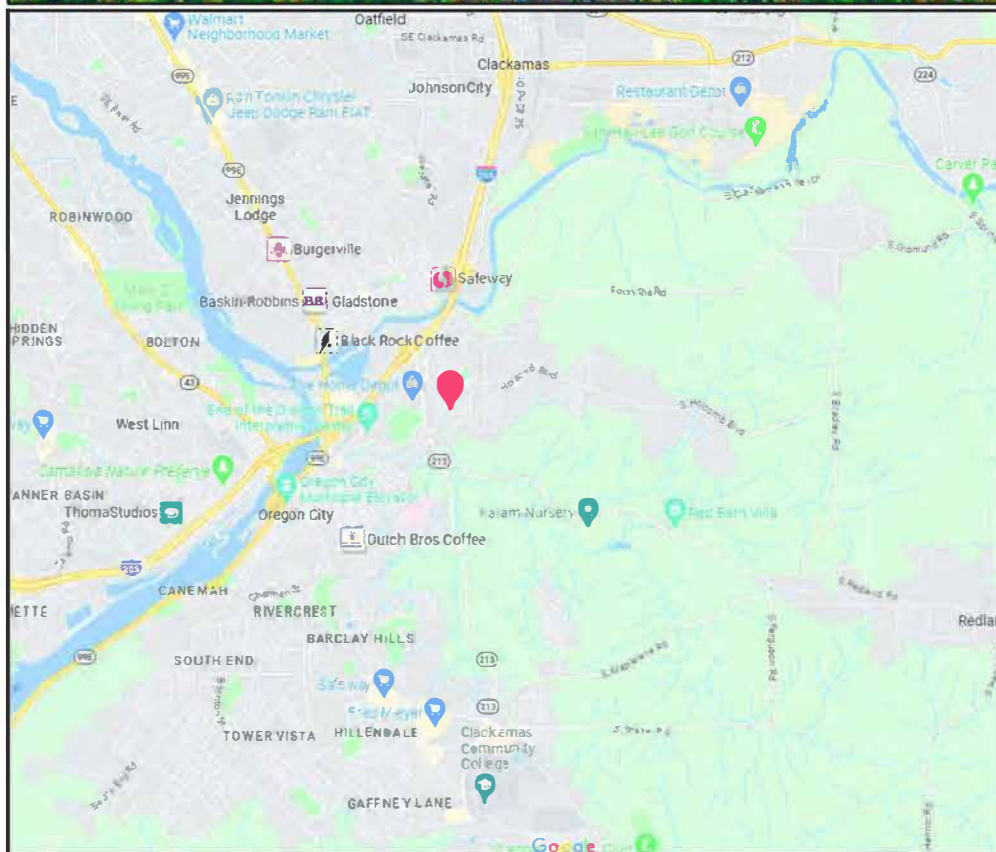


2040 Planning and Development Grant Application | Equitable Development  
*Location Maps*





# 2040 Planning and Development Grant Application | Equitable Development Location Maps





## 2040 Planning and Development Grant Application | Equitable Development Supplemental Graphic Material and Project Images

**Clackamas Heights Site Map**



**Census Tract 223.01**



<b>Clackamas Heights - Distribution by Head of Household's Race (98 households)<sup>1</sup></b>																	
White Only		Black/African American Only		American Indian or Alaska Native Only		Asian Only		Native Hawaiian/ Other Pacific Islander Only		White, American Indian/ Alaska Native		White, Black/ African American		White, Asian		All Other Combinations	
Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
	<b>86%</b>		<b>7%</b>		<b>1%</b>		<b>0%</b>		<b>1%</b>		<b>3%</b>		<b>1%</b>		<b>0%</b>		<b>1%</b>

<b>Census Tract 223.01 - Race<sup>2</sup></b>																	
White Only		Black/African American Only		American Indian or Alaska Native Only		Asian Only		Native Hawaiian/ Other Pacific Islander Only		Some other race altogether		Two or more races		Three or more races		Total	
Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	4,953	
<b>4,204</b>	<b>85%</b>	<b>51</b>	<b>1%</b>	<b>39</b>	<b>1%</b>	<b>39</b>	<b>1%</b>	<b>18</b>	<b>0%</b>	<b>134</b>	<b>3%</b>	<b>416</b>	<b>8%</b>	<b>37</b>	<b>1%</b>		

<b>Clackamas Heights - Distribution by Income<sup>1</sup></b>							
Extremely Low Income, 0%- 30% of Median		Very Low Income, 31% - 50% of Median		Low Income, 51% - 80% of Median		Above Low Income 81% + of Median	
Count	%	Count	%	Count	%	Count	%
<b>80</b>	<b>82</b>	<b>9</b>	<b>9</b>	<b>6</b>	<b>6</b>	<b>3</b>	<b>3</b>

<b>Clackamas Heights - Distribution of Income (98 households)<sup>1</sup></b>							<b>Average Annual Income</b>
\$0	\$1 - \$5,000	\$5,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000	Above \$25,000	<b>\$17,520</b>
<b>13</b>	<b>10</b>	<b>10</b>	<b>26</b>	<b>13</b>	<b>8</b>	<b>19</b>	
<b>Census Tract 223.01 - Distribution of Income (1,732 households)<sup>2</sup></b>							<b>Median Income</b>
	\$1 - \$24,999	\$25,000 - \$34,999	\$35,000 - \$49,999	\$50,000 - \$74,999	\$75,000 - \$99,999	Above \$100,000	<b>\$73,250</b>
	<b>298</b>	<b>62</b>	<b>260</b>	<b>251</b>	<b>178</b>	<b>681</b>	
	<b>17.2%</b>	<b>3.6%</b>	<b>15.0%</b>	<b>14.5%</b>	<b>10.3%</b>	<b>39.3%</b>	

## 2040 Planning and Development Grant Application | Equitable Development Supplemental Graphic Material and Project Images

<b>Distribution by Household Member's Age as a % of Total Household Members<sup>1</sup></b>											
0 - 5		6 - 17		18 - 50		51 - 61		62 - 82		83+	
Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
<b>13</b>	<b>6%</b>	<b>63</b>	<b>30%</b>	<b>75</b>	<b>35%</b>	<b>25</b>	<b>12%</b>	<b>36</b>	<b>17%</b>	<b>0</b>	<b>0%</b>

<b>Census Tract 223.01 - Distribution by Household Member's Age as a % of Total Household Members (4,414)<sup>2</sup></b>											
0 - 4		5 - 19		20 - 49		50 - 59		60 - 84		85+	
Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
<b>304</b>	<b>7%</b>	<b>700</b>	<b>16%</b>	<b>1,714</b>	<b>39%</b>	<b>724</b>	<b>16%</b>	<b>895</b>	<b>20%</b>	<b>77</b>	<b>2%</b>

<b>Distribution by Length of Stay as a %<sup>1</sup></b>											
Less than 1 year		1+ to 2 years		2+ to 5 years		5+ to 10 years		10+ to 20 years		Over 20 years	
Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
<b>3</b>	<b>3</b>	<b>5</b>	<b>5</b>	<b>23</b>	<b>23</b>	<b>27</b>	<b>28</b>	<b>22</b>	<b>22</b>	<b>18</b>	<b>18</b>

<b>Clackamas Heights - Distribution by Household Size as a %<sup>1</sup></b>							<b>Total Household Members and Average Size<sup>1</sup></b>		
1 Person	2 Persons	3 Persons	4 Persons	5 Persons	6 Persons	7 Persons	Total Number of Household Members	Average Household Size	Number of Households
<b>39</b>	<b>30</b>	<b>16</b>	<b>11</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>212</b>	<b>2</b>	<b>98</b>

<b>Distribution by Household Size as a %<sup>2</sup></b>							<b>Total Household Members and Average Size<sup>2</sup></b>		
1 Person	2 Persons	3 Persons	4 Persons	5 Persons	6 Persons	7 Persons	Total Number of Household Members	Average Household Size	Number of Households
<b>39</b>	<b>30</b>	<b>16</b>	<b>11</b>	<b>1</b>	<b>2</b>	<b>1</b>		<b>2.54</b>	<b>1,732</b>

<b>Clackamas Heights - Distribution of Family Type<sup>1</sup></b>									
Elderly, No Children, Non-Disabled		Elderly, with Children, Non-Disabled		Non-Elderly, No Children, Non-Disabled		Non-Elderly, with Children, Non-Disabled		Elderly, No Children, Disabled	
Count	%	Count	%	Count	%	Count	%	Count	%
<b>10</b>	<b>10%</b>	<b>1</b>	<b>1%</b>	<b>16</b>	<b>16%</b>	<b>29</b>	<b>30%</b>	<b>17</b>	<b>17%</b>

<b>Clackamas Heights - Distribution of Family Type (cont'd)</b>							
Elderly, with Children, Disabled		Non-Elderly, No Children, Disabled		Non-Elderly, with Children, Disabled		Female Head of Household, with Children	
Count	%	Count	%	Count	%	Count	%
<b>1</b>	<b>1%</b>	<b>18</b>	<b>18%</b>	<b>7</b>	<b>7%</b>	<b>34</b>	<b>35%</b>

<sup>1</sup> HACC YARDI Data for Clackamas Heights 08/2022 – 08/2023

<sup>2</sup> 2021 ACS 5-Year Estimates (U.S. Census Bureau)



2040 Planning and Development Grant Application | Equitable Development  
Supplemental Graphic Material and Project Images



Typical apartment unit exterior wall finishes.



Typical bathroom finishes.



Typical roof drain gutters.



Typical apartment unit side elevation.



Typical apartment unit range.

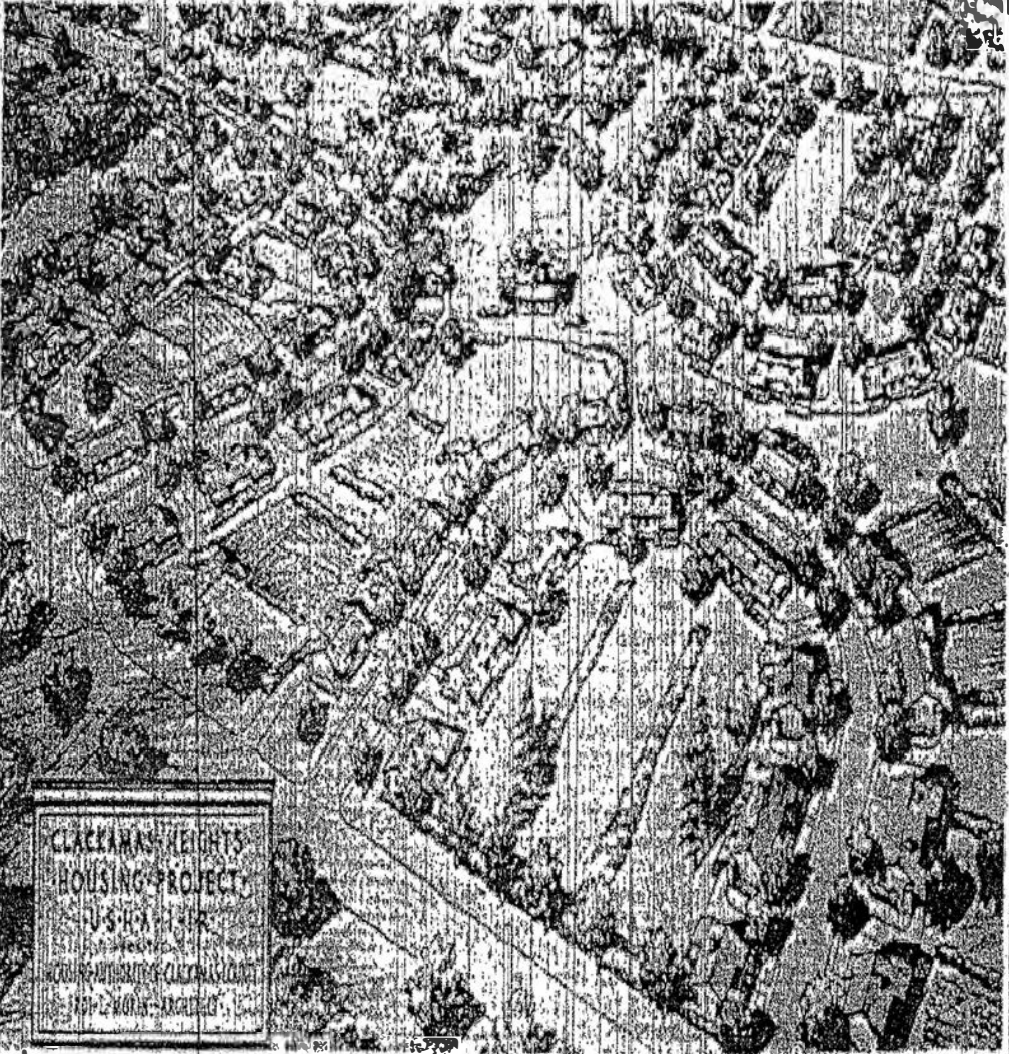


Typical walkway.



THE SUNDAY OREGONIAN, PORTLAND, DECEMBER 7, 1942

### Bids on \$265,000 Clackamas Heights Housing Project Billed



CLACKAMAS HEIGHTS HOUSING PROJECT  
U.S. HOUSING ADMINISTRATION  
CLACKAMAS COUNTY  
1821 L. WOLFE ARCHITECTS

Bids will be opened at Oregon City December 19 on the proposed new \$265,000 Clackamas heights housing project, near Oregon City. Pictured here is an artist's drawing of the project, which will provide 400 living units in 83 buildings. The project will be the second launched by the Clackamas county housing authority, the first now being built at Milwaukie by Ross B. Hammond company, Portland. Plans were drawn for both by Ros L. Hammond, Portland architect.

THE SUNDAY OREGONIAN, PORTLAND, DECEMBER 7, 1942





**REQUEST FOR PROPOSALS #2023-45  
Qualifications Based Selection**

**HOUSING AUTHORITY OF CLACKAMAS COUNTY  
for  
Planning and Design Services for the Redevelopment of Clackamas Heights  
Oregon City, OR 97045**



**ISSUED: May 1, 2023  
PROPOSAL CLOSING DATE, TIME, AND LOCATION**

**DATE:** June 23, 2023; 5:00PM PST

**TIME:** 2:00 PM, Pacific Time

**PLACE:** [CHRedevInfo@clackamas.us](mailto:CHRedevInfo@clackamas.us)

## **SCHEDULE**

Request for Proposals Issued.....	May 1, 2023
Protest of Specifications Deadline.....	May 8, 2023, 5:00 PM, Pacific Time
Optional Site Visit.....	May 16, 2023, 1:00PM Pacific Time
Deadline to Submit Clarifying Questions.....	June 7, 2023, 5:00 PM, Pacific Time
Issue of Final Addendum (if necessary).....	June 14, 2023
Request for Proposals Closing Date and Time.....	June 23, 2023, 5:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award

## **TABLE OF CONTENTS**

Section 1 – Notice of Request for Proposals
Section 2 – Instructions to Proposers
Section 3 – Scope of Work
Section 4 – Evaluation and Selection Criteria
Section 5 – Proposal Content (Including Proposal Certification)

**SECTION 1  
NOTICE OF REQUEST FOR PROPOSALS**

Notice is hereby given that the Housing Authority of Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **5:00 PM, June 23, 2023** (“Closing”), to provide Planning and Design Services for the Redevelopment of Clackamas Heights Oregon City, OR 97045. No Proposals will be received or considered after that time.

**Optional Site Visit:** Tuesday, May 16<sup>th</sup>, 2023 at 1:00pm PST.  
Meeting place: 19300 S Gain Street; Oregon City, OR 97045

**Location of RFP documents: OregonBuys**

RFP Documents can be downloaded from the state of Oregon procurement website (“OregonBuys”) at the following address <https://oregonbuys.gov/bso/vicw/login/login.xhtml>, Document No. S-C01010-00006697.

Prospective Proposers are responsible for obtaining any Addenda, clarifying questions, and Notices of Award from the Authority website: <http://www.clackamasus/housingauthority/bids.html>.

**Submitting Proposals**

Proposals will only be accepted electronically, inclusive of all exhibits, via email to [CHRedcvInfo@clackamas.us](mailto:CHRedcvInfo@clackamas.us)

**Contact Information**

Procurement Process and Technical Questions: [CHRedcvInfo@clackamas.us](mailto:CHRedcvInfo@clackamas.us)

The Housing Authority 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 Housing Authority 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 who’s Proposal shall be best for the public good.

Clackamas County encourages proposals from Minority, Women, Veteran and Emerging Small Businesses.

## SECTION 2 INSTRUCTIONS TO PROPOSERS

The Housing Authority of Clackamas County (“HACC”) 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 HACC.

**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 HACC to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. HACC will consider all requested changes and, if appropriate, amend the RFP. No oral or written instructions or information concerning this RFP from HACC managers, employees or agents to prospective Proposers shall bind HACC 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:** It shall be Proposers responsibility to regularly check <http://www.clackamas.us/housingauthority/bids.html> 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 HACC 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:** HACC will name the apparent successful Proposer in a Notice of Intent to Award published on <http://www.clackamas.us/housingauthority/bids.html>. 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 email, 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.

HACC 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, HACC 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 HACC.

**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:** HACC 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. HACC 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 HACC), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by HACC.

**2.11 Clarification and Clarity:** HACC 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:** HACC 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 HACC.

**2.13 Cancellation:** HACC 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. HACC 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 HACC's sole option, Proposers may be required to give an oral presentation of their Proposals to HACC, 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 HACC. **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 HACC 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. HACC 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 HACC 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 HACC 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:** HACC 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 HACC. 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 HACC, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

**2.22 Clerical Errors in Awards:** HACC 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 HACC has a pecuniary interest in this Proposal.

**2.25 Evaluation Committee:** Proposals will be evaluated by a committee consisting of representatives from HACC and potentially external representatives. HACC 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 HACC.

**2.27 Best and Final Offer:** HACC may request best and final offers from those Proposers determined by HACC to be reasonably viable for contract award. However, HACC 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, HACC may select for final contract negotiations/execution the offers that are most advantageous to HACC, 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.

## SECTION 3 SCOPE OF WORK

### 3.1. INTRODUCTION

The Housing Authority of Clackamas County (HACC) requests qualifications from qualified and experienced professionals that can perform the Scope of Work as described below.

As a result of this solicitation, HACC intends to award a single contract to the most qualified team (“Design Team”) to provide planning and design services for the Clackamas Heights Redevelopment in Oregon City, Oregon.

**Please direct all Technical/Specifications or Procurement Process Questions to the indicated contact referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.**

### 3.2 BACKGROUND

Clackamas County is both a rural and suburban county located on the southeastern edge of Portland, Oregon. Clackamas County, in north central Oregon, is one of the four counties that make up the Portland, Oregon, metropolitan area. Its boundaries extend from the City of Portland to the Mt. Hood National Forest. It is bounded by Multnomah County to the north, Wasco County to the east, Marion County, home of the State capitol, to the south, and Yamhill and Washington counties to the west. Clackamas County is Oregon's third-most populous county with a population of approximately 423,000 people. The County spans nearly 1900 square miles and is roughly equivalent to the size of the state of Delaware.

The eastern half of the County is primarily rural with its main industries in the forest products, agricultural, and tourism sectors. By comparison, the western side of the County is within the regional urban growth boundary (UGB) and is largely suburban with industrial and light commercial transit and commerce corridors.

HACC is a division of the Clackamas County Department of Health, Housing and Human Services and is governed by a Board of Commissioners made up of the Clackamas County Board of Commissioners plus one Housing Authority Resident Commissioner. HACC's mission is to expand the supply of affordable housing to break the cycle of poverty while improving the quality of life for the entire community. HACC's portfolio consists of 1224 units including 445 units of public housing.

#### Project Description

HACC is seeking a Design Team to envision a concept and identify the steps necessary to transform the underutilized 16.5-acre public housing site into a vibrant community that provides stable, affordable housing options within the Oregon City community.

The goal of this Clackamas Heights planning effort is to design a roadmap for redevelopment of the site. HACC would like to replace the existing housing development of 100 units with up to 250 units. The plan will be a comprehensive assessment of the opportunities, constraints, community and resident needs, and design objectives. The success of the planning effort will hinge on a comprehensive and diverse public engagement process designed to solicit feedback from current residents, the surrounding neighborhood, local business, city officials and other stakeholders.

The need for affordable housing in Clackamas County is great. The number of applicants far outpaces the number of available units at any given time. Current residents of the Clackamas Heights community represent historically disenfranchised communities, including low-income Black, Indigenous and People of Color (BIPOC) communities, individuals with disabilities, and seniors. The intention for this project is



to lay the foundation for community revitalization, increased housing density, improved site amenities, and to incorporate meaningful input from public housing residents and other stakeholders.

The city has completed a [Housing Needs Analysis](#) which should be reviewed as part of the planning process.

### **Property Description**

Clackamas Heights is a 16.5-acre campus close to central Oregon City. The property is bounded by the Park Place neighborhood, with Front Avenue to the east, Gain Street to the north, Apperson Boulevard to the west and Holcomb Boulevard to the southeast.

Built in the early 1940's as temporary housing, Clackamas Heights is one of the oldest public housing communities in Oregon. It is composed of 100 single-level, duplex homes, a community building, play area and the offices of the Housing Authority of Clackamas County. Clackamas Heights presents an incredible opportunity for increased housing density in a property situated near the intersection of two major highways (I-205 and 99E), the McLoughlin transportation and employment corridor, and downtown Oregon City.

### **Financing**

HACC intends to use the resulting redevelopment plan to leverage federal, state and local funding, which may include HUD funding, Low Income Housing Tax Credits, state and local funding, and other funding opportunities.

### **Project Stakeholders**

In addition to the Design Team proposed in this RFQ, the Project Stakeholders will be an important part of the Development Team. It is expected that various Project Stakeholders will be brought into the design efforts as appropriate through focus groups, a monthly Planning Committee meeting and regular Stakeholder and Development Team meetings. Project Stakeholders include:

- HACC staff – leading the redevelopment effort as the Project Owner
- Current residents of Clackamas Heights and the surrounding neighborhood
- Oregon City's Planning and Community Development Department
- Neighbors in the surrounding Park Place neighborhood
- HACC's Development and Financial Consultant – providing consultation on development and financial feasibility

## **3.3. SCOPE OF WORK**

### **3.3.1. Scope:**

#### **Overview**

The most qualified Design Team will be selected to lead planning and engagement efforts and provide design expertise based on the specific scope of services outlined in *Section II Part C – Work Scope*.

The Design Team must exhibit strong qualifications, experience, expertise and the ability to provide the professional services required to meet the project's scope. This redevelopment project will be a multi-year project that will include several phases of work. The first two phases are outlined below. Subsequent phases will be defined as the project progresses.

#### **Phase 1**

- Conduct a community engagement process to identify need and inform design
- Recommend a redevelopment concept that best meets HACC and community needs
- Identify necessary changes to infrastructure and roads
- Outline land use requirements and approval process

Based on the community engagement and design recommendations identified in Phase I, HACC may engage the selected Design Team to complete Phase 2. The scope of work for Phase 2 will largely depend on decisions made in Phase I but may include, but is not limited to, the following;

### **Phase 2**

- Redevelopment plan and/or master plan for the site
- Land use approvals and entitlements process
- Community engagement
- Infrastructure planning- including stormwater, roads, and utilities
- Traffic impact analysis
- Sustainability planning

### **Design Team**

The successful Design Team, either through in-house or sub-consultants, shall provide HACC with professional services that may include, but is not limited to, the following areas:

- Land Use
- Architecture
- Civil Engineering
- Landscape Design
- Traffic Impact
- Public Engagement
- Sustainability

### **Work Scope**

HACC is looking for qualified and experienced professionals to prepare a redevelopment concept for Clackamas Heights. This includes but is not limited to the following:

#### **I. Public Engagement**

Public engagement may involve resident and community focus groups, design workshops, coordination with planning and stakeholder committees, as well as regular Development Team meetings. Additional outreach and engagement strategies may be utilized including online or in person surveys and interviews with key stakeholders. Success for these activities will be measured by the frequency and variety of engagement opportunities, the diversity and quantity of stakeholder input and the integration of community preferences into the final design.

- a. Assist HACC with the design and outreach for the public engagement efforts.
- b. Conduct public outreach efforts to identify the community's needs and solicit specific pieces of feedback. Obtain input from Project Stakeholders as well as the public-at-large to identify program goals and development opportunities.
- c. Reach out to existing residents and potential future user groups to identify preferences for housing, type, design features, meaningful sustainability efforts, amenities that promote healthy living and site planning options that enhance community connectivity.
- d. Evaluate feedback, test feasibility, and incorporate input as appropriate into design.

#### **II. Design Concept**

The proposed redevelopment concept should be a reflection of community needs that improves sustainability and livability on the existing Clackamas Heights site. The public input process will inform the resulting final design concept whose design should be inspirational as well as viable.



- a. Conduct site evaluation studies of existing property, including infrastructure, existing buildings, and site amenities. Review nearby existing uses and opportunities.
- b. Conduct a zoning analysis and make recommendations, including the opportunities and constraints of pursuing a master planning process in order to develop multi-family housing or pursuing a cottage cluster model.
- c. Consider and evaluate options for building uses, unit sizes and counts, building types, site amenities, infrastructure upgrades and phases of development. Make recommendations based on current needs and anticipated future trends.
- d. Develop a project goal statement and development program based on community engagement efforts, HACC goals, and coordination with Oregon City’s planning staff.
- e. Prepare concept design options illustrating project goals and development program. Identify potential opportunities and constraints for each option for public review.
- f. Coordinate and conduct community design workshops to refine design and development priorities.
- g. Refine preferred concept design into a site plan with targeted development goals. Identify zone changes and infrastructure improvements necessary to successfully implement the redevelopment plan.
- h. Prepare a Transportation Impact Study to inform the City of Oregon City’s future planning efforts.
- i. Throughout the process, refine and update the design concept based on input received from HACC’s financial consultant.
- j. Identify project phases, highlighting infrastructure, site amenities and building improvements, estimated milestones, and project schedule and anticipated timeline.
- k. Develop and evaluate sustainability goals for the property. Explore feasibility of expanding existing community gardens, developing renewable energy sources, installing creative storm water elements, incorporating creative transportation opportunities as well as other sustainability efforts as a part of the design. Evaluate options for sustainable communities and make recommendation on most appropriate strategy.

**Minimum Requirements**

To be qualified to respond, firms must possess at least five (5) years of recent and relevant experience. Respondents must not be debarred, suspended, or otherwise ineligible to contract with HACC, and must not be included on the General Services Administration’s “List of Parties Excluded From Federal Procurement and Non- Procurement Programs” or the Department of Housing and Urban Development’s “Limited Denial of Participation” list. In addition, respondents must have current and active registration in the State of Oregon Business Registry. Firms must be licensed (if required by law) based on professional discipline.

**Minority Business (MBE) Goals**

The firm submitting a proposal shall be aware of the HACC goals of consistency with Presidential Executive Orders 11625, 12138 and 12432 and Section 3 of the HUD Act of 1968.

The HACC goal is to make efforts to ensure that small and minority-owned business, women’s business enterprises, labor surplus area business, and individuals or firms located in or owned in substantial part by persons residing in the area of a HACC project are used when possible.

**3.3.3. Term of Contract:**

The term of the contract shall be from the effective date through **June 30, 2028**.

**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 **Personal Services Contract** for this RFP can be found at <https://www.clackamas.us/finance/terms.html>.

Personal Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 5 – Travel and Other Expense is Authorized
- Article II, Paragraph 28 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Article II, Paragraph 31 – Cooperative Contracting
- Article II, Paragraph 32 – Federal Contracting Requirements
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- 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.
- 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.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$1,000,000 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 HACC decision maker based on the highest scoring Proposal. The HACC 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.

### 4.2 Evaluation Criteria

Category Points available:

Submission Requirement (Section III.D)	Points
1. Cover Letter	5
2. Firm Strength & Experience of Team Assigned	15
3. Relevant Project Experience	15
4. Design Concept, Project Understanding, Pricing	40
5. MBE/WBE/DBE Firm and Commitment to Racial Equity	15
6. Clarity and Conciseness of Proposal	10
<b>Total</b>	<b>100</b>

- 4.3 Once a selection has been made, the HACC will enter into contract negotiations. During negotiation, the HACC 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 HACC 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 HACC 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:

5.1.2. Completed proposal documents must arrive electronically via Email to [CHReDevInfo@clackamas.us](mailto:CHReDevInfo@clackamas.us)

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

5.1.4. Proposal may not exceed a total of **30 pages** (single-sided, 11 point font), inclusive of all exhibits, attachments, title pages, pages separations, table of contents, or other information. Proposal Certification Page will NOT count towards the final page count.

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

#### 5.2. Cover Letter:

Limit letter to a maximum of two (2) pages. Introduce your firm and describe your general philosophy and relevant experience for the contemplated work. The letter must be signed by and include contact information for a person with ownership interest in the company.

#### 5.3. Design Team Description:

- a. Discuss the Lead Firm's history, size and organizational structure. Include names of all persons with ownership interest in the company and their titles/roles. Describe the in-house services Lead Firm will provide for project.
- b. Provide resumes of key personnel for the Lead Firm. Include title and relevant project experience. Identify the Project Manager for the Design Team.
- c. Describe the Consultant Team members by discipline including role on the Design Team and experience with the Lead Firm. Identify staff who will be working on this project and their relevant project experience.

#### 5.3. Relevant Project Experience:

Describe the Lead Firm's recent and relevant project experience on a minimum of three projects that describe the Lead Firm's experience with the following aspects:

- a. Describe previous projects that are similar in scope to the project described. Projects should illustrate your firm's experience on community master planning efforts, especially those that include affordable housing projects.
- b. Identify Consultant Team members who participated in each project.
- c. Provide project examples describing Consultant Team member's relevant experience to complete their assigned role.

#### 5.4. Project Concept and Understanding:

Describe the Lead Firm's understanding of the project and its unique needs. Please identify your firm's (or as appropriate, the Consultant Firm's) approach towards the project components and describe any projects that may involve the following scope:

- a. Public engagement and community design efforts
- b. Projects similar to this RFQ's scope of work
- c. Projected schedule and design budget estimates
- d. Affordable housing, including HUD-funded projects
- e. Public Housing repositioning and redevelopment
- f. Master-planned communities and cottage clusters
- g. Sustainable Building and Community Design

### **5.5. Diversity in Employment and Contracting**

The firm submitting a proposal shall be aware of the HACC goals of consistency with Presidential Executive Orders 11625, 12138 and 12432 and Section 3 of the HUD Act of 1968. The HACC goal is to make efforts to ensure that small and minority-owned business, women's business enterprises, labor surplus area business, and individuals or firms located in or owned in substantial part by persons residing in the area of a HACC project are used when possible.

HACC encourages the use of minority-owned businesses, woman-owned businesses, businesses that service disabled veterans own and emerging small businesses, as defined under State law in ORS Chapter 200 and as certified by the Certification Office of Business Inclusion and Diversity (referred to here as COBID Certified Businesses) to the maximum extent practical.

Indicate whether your proposal includes subcontractors. If your proposal does not include subcontractors, complete Section 1 only. If your proposal does include subcontractors, complete both Section 1 and Section 2. If you are proposing an alternative approach to equity contracting in the scope of the project, please complete Section 3.

#### **Section 1: *To be completed by all proposers***

- Certification: Is your firm a COBID Certified Business? If yes, indicate all certification types and your firm's certification number.
- Demographics: Describe the diversity in demographics of the proposal team (yourself, your firm and/or any proposed subcontractors). Include race, gender, veteran status and disability. You may also include other measures of diversity, as defined in Section 5 above. Identify the diverse nature of the people that will perform work in substantive roles and percentage of work on this project.
- Support: Describe specific examples of how you and/or your firm support workforce diversity within your firm and/or your local community.

#### **Section 2: *To be completed by proposers utilizing subcontractors***

- Subcontractor Information: Provide the following information for each subcontractor included in this project team:
  - Firm's name
  - Is the subcontractor a COBID Certified Business? If yes, indicate the state of certification, all certification types and subcontractor's certification number.
  - Method of choosing identified subcontractor
  - Specific scope of work tasks
  - Percentage of project dollars

#### **Section 3: *To be completed by proposers with an alternative approach to Equity Contracting***

- Description of alternative approach to equity contracting: Please describe the approach your firm will take to ensure that the Diversity and Equity in employment and contracting goals are achieved within the scope of the project.

### **5.6. References**

Provide (3) references, previous and/or current. References shall include the following information:

- a. Name, title, mailing address and current phone number and email address of contact.

b. Description of services provided and date the project was completed.

**5.7. Lobbying Certificate (see the below form)**

**5.8. Debarment Certificate (see the below form)**

**5.9. Form HUD 5369-B: Instructions to Offerors Non-Construction (see the below form)**

**5.10. Form HUD 5369-A: Representations, Certifications, and Other Statement of Bidders (see the below form)**

**5.11. Form HUD 5370-C: General Conditions for Non-Construction Contracts**

**5.12. Completed Proposal Certification (see the below form)**



**Debarment Certificate**  
Regarding Ineligible Contractors

**CERTIFICATION OF LOWER-TIER PARTICIPANTS REGARDING DEBARMENT, SUSPENSION, AND OTHER INELIGIBILITY AND VOLUNTARY EXCLUSION**

The Lower Tier Participant (potential sub-grantee or sub-recipient under a HUD project, potential third party contractor, or potential subcontractor under a major third party contract) certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

(If the Lower Tier Participant (potential sub-grantee or sub-recipient under a HUD project, potential third party contractor, or potential subcontractor under a major third party contract) is unable to certify to any of the statements in this certification, such participant shall attach an explanation to this proposal.)

THE LOWER TIER PARTICIPANT (POTENTIAL SUB-GRANTEE OR SUB-RECIPIENT UNDER A HUD PROJECT, POTENTIAL THIRD PARTY CONTRACTOR, OR POTENTIAL SUBCONTRACTOR UNDER A MAJOR THIRD PARTY CONTRACT) CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

\_\_\_\_\_  
Signature and Title of Authorized Official

**CHECK APPROPRIATE BOX:**

The undersigned chief legal counsel for \_\_\_\_\_ hereby certifies that \_\_\_\_\_ has authority under State and local law to comply with the subject assurances and that the certification above has been legally made.

\_\_\_\_\_  
Signature of Participant's Attorney

\_\_\_\_\_  
Date

Bidder or offeror does not have a chief legal counsel

# CLACKAMAS HEIGHTS



NORTH

THOMAS GUIDE #  
687-E6



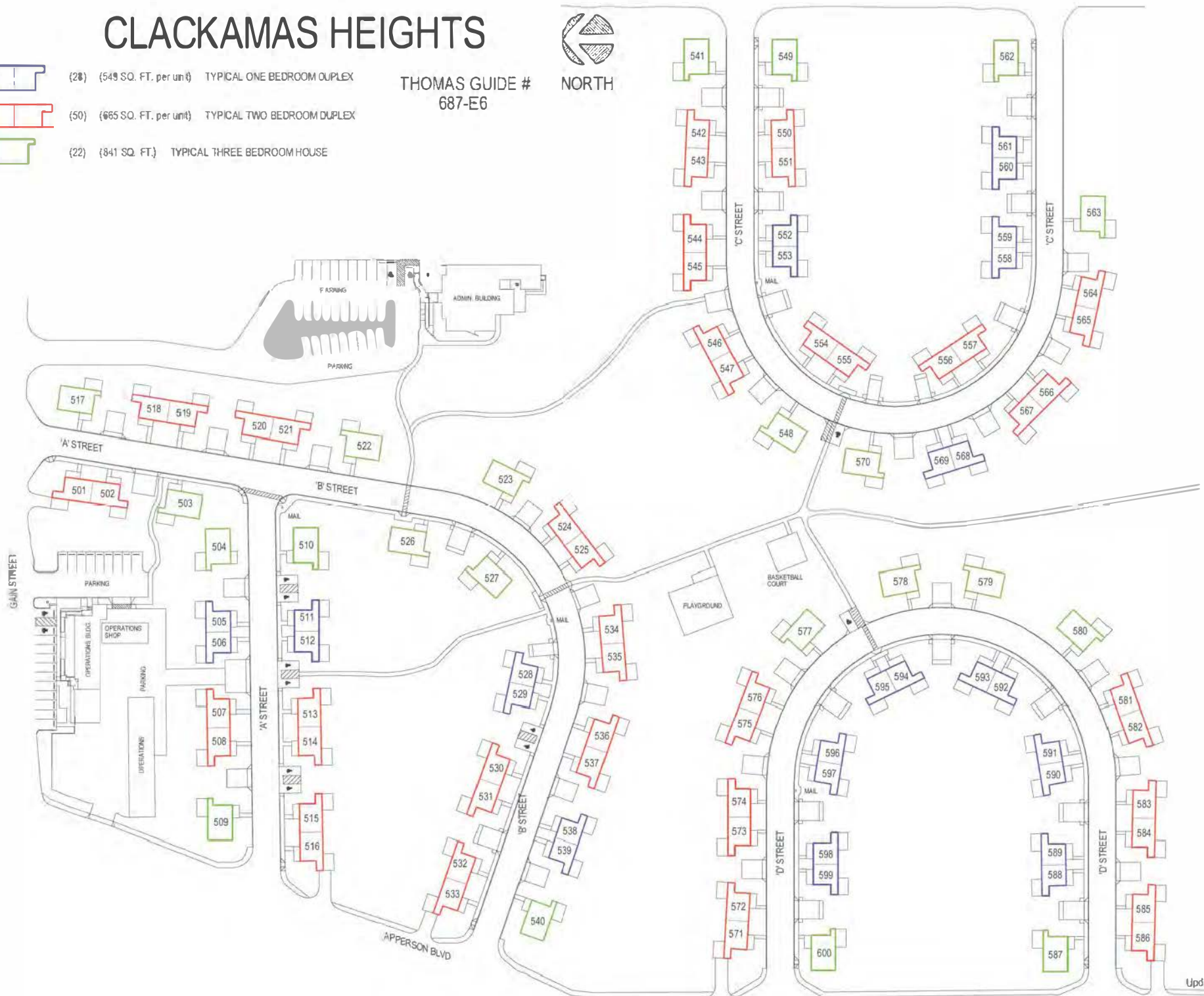
(28) {549 SQ. FT. per unit} TYPICAL ONE BEDROOM DUPLEX



(50) {665 SQ. FT. per unit} TYPICAL TWO BEDROOM DUPLEX



(22) {841 SQ. FT.} TYPICAL THREE BEDROOM HOUSE



**LEGEND**

CONCEPT DEVELOPMENT  
PLAN BOUNDARY

CONIFEROUS TREE - EXISTING TO REMAIN

DECIDUOUS TREE - EXISTING TO REMAIN

COVERED PARKING, CARRIAGE UNIT ABOVE

**PROPOSED PROGRAM**

**R-3.5 LOT 700**

- RESIDENTIAL UNITS: 250-263 (INCLUDES SINGLE FAMILY ATTACHED, DETACHED, ROWHOUSES AND MULTI-FAMILY)
- COMMUNITY CENTER: INCLUDES ACCESSORY OFFICE (8,000 SF)
- MULTI-FAMILY: INCLUDES ACCESSORY OFFICE (200 SF)

**MUC-1 LOTS 400-500**

- EARLY CHILDHOOD EDUCATION AND FAMILY WELLNESS CENTER: 14,000 SF
- RETAIL: 2,000 SF (NEIGHBORHOOD SERVING)

**NOTES:**

1. SEE SEPARATE EXHIBIT FOR PROPOSED DEVELOPMENT PHASES AND FUTURE PHASES AND SUBDIVISIONS. THESE WILL BE FINALIZED IN DETAIL FOR DEVELOPMENT PLAN.

2. THE HOUSING MIX WILL BE FINALIZED IN THE DETAILED DEVELOPMENT PLAN. SEE APPLICATION NARRATIVE FOR DESCRIPTION, TABLE 2.

3. BUILDING FOOTPRINTS ARE DIAGRAMMATIC AS SHOWN AND INDICATE THE OVERALL CONCEPT ACTUAL FOOTPRINTS FOR EACH BUILDING GROUPING WILL BE FINALIZED IN DETAILED DEVELOPMENT PLAN AND MAY VARY FROM THE CONCEPT PLAN.



**BLOCK DIAGRAM**

SCALE: 1" = 150'-0"



**NOT FOR CONSTRUCTION**



# BORA

---

12/5/2023

Devin Ellin  
Housing Authority of Clackamas County  
13930 Gain St.  
Oregon City, OR 97045

RE: Clackamas Heights Development Study  
Fee Proposal

Dear Devin:

Thank you for the opportunity to partner with you on the Clackamas Height Development Study in Oregon City. This proposal outlines our project understanding, the scope of architectural and consultant services, the project schedule, and the compensation for the Clackamas Heights Study. This proposal will be executed via owner's standard work agreement.

## PROJECT UNDERSTANDING

### Project Site

Located in Oregon City, the development site is 16.5 acres located at Gain St. between Apperson Blvd and Front Ave. The site currently includes 100 affordable housing units and HACC offices with associated storage buildings. Site survey has been provided by the owner.

### Project Scope

Design team to assess replacing the existing 100 units with up to 250 new affordable housing units. The HACC offices and storage building functions will be relocated off site.

The existing 'A' Street, 'B' Street, 'C' Street and 'D' Street ROW will all be vacated, and utilities capped. New streets will be developed as part of the planning process per Oregon City requirements. Humber Civil engineers will be assisting in the street design process.

Phase 1 - Study will begin with a layout that complies with cottage cluster requirements which are allowable under current zoning. A community room, playground and community gardens should all be considered in the new development plan. Re-zoning and hybrid options will be reviewed as needed.

Phase 2 - Phase 1 schemes will be the basis of the outreach process which will be pursued in Phase 2. The outreach will be led by the design team and will be integral to the development of the final scheme. Phase 2 scope of work includes a full redevelopment plan including land use approvals and entitlements, infrastructure planning (stormwater, roads and utilities), traffic impact analysis and sustainability planning.



# BORA

## Sustainability

Climate science tells us that we have about a decade to turn around our carbon economy if we hope to avoid irreversible, devastating, and inequitable effects from climate change. Bora recognizes the important role that buildings play in this calculation and is committed to becoming a carbon neutral practice by 2030. As we address development plans, the focus of the planning is creating resiliency for the community, equity in the design and establishing sustainability goals for the future buildings.

Bora has a long-standing commitment to healthy interior environments, including daylighting, natural ventilation, non-toxic materials, designing for movement, and biophilic design. Many of these aspects can be included with little to no budget impact.

## Equity and Outreach

See attached proposal from Cascadia Partners and Metro Scope of Work.

## COMPENSATION AND PAYMENT SCHEDULE

The total amount of compensation requested for the services described in this proposal, exclusive of Reimbursable Expenses, shall be a fixed price billed on a percentage complete basis. Proposed schedule is attached.

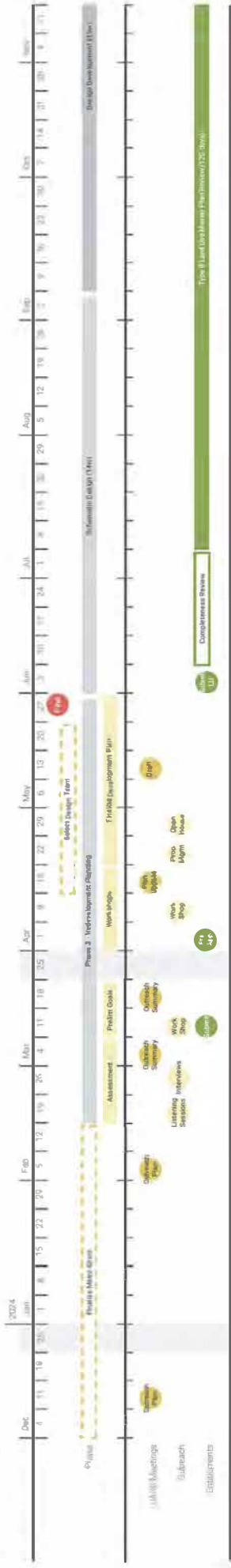
PHASE:		Phase 1	Needs	Goals	Workshops	Plan	TOTAL	MWESB
<b>Architect</b>								
Bora	Architect	\$27,585	\$20,415	\$14,000	\$14,000	\$68,000	\$144,000	
<b>Consultants</b>								
PLACE	Landscape	\$16,000	\$19,000	\$8,000	\$8,000	\$44,000	\$95,000	23.76%
Humber	Civil	\$2,375	\$9,000	\$0	\$0	\$31,335	\$42,710	
Cascadia	Outreach	\$0	\$9,845	\$39,500	\$18,435	\$14,870	\$82,650	20.67%
Kittelson	Traffic	\$0	\$0	\$10,000	\$0	\$10,000	\$20,000	
Biohabitats	Sustainability	\$0	\$0	\$0	\$8,000	\$0	\$8,000	
Bookin Group	Land Use	\$0	\$0			\$0	\$0	TBD
<b>Consultant Subtotal:</b>		\$18,375	\$37,845	\$57,500	\$34,435	\$100,205	\$248,360	
Mark-Up:	3%	\$551	\$1,135	\$1,725	\$1,033	\$3,006	\$7,451	
<b>Subtotal:</b>		\$46,511	\$59,395	\$73,225	\$49,468	\$171,211	\$399,811	44.43%
<b>Reimbursable Expense:</b>		\$1,300	\$10,000	\$2,000	\$2,000	\$7,700	\$23,000	Includes CAC payments, giftcards and translation
<b>GRAND TOTAL</b>		\$47,811	\$69,395	\$75,225	\$51,468	\$178,911	\$422,811	

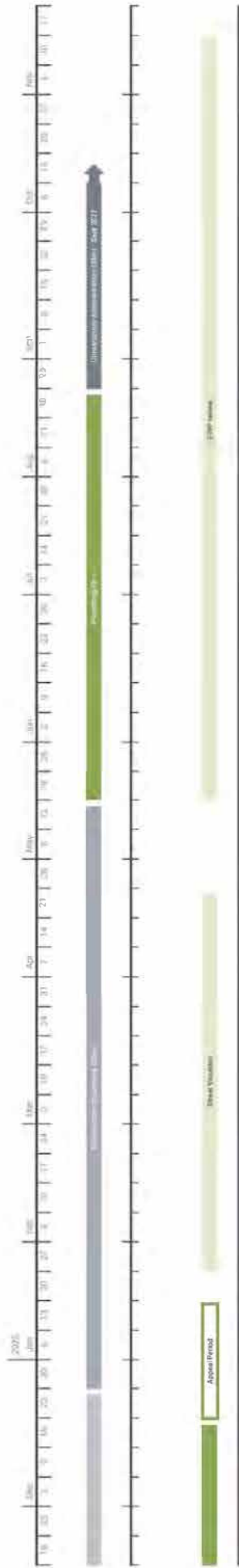
Reimbursable expenses shall be billed at cost with a 5% markup and shall not exceed the limit proposed without written approval from the RACC. Expenses include items such as printings, mileage, and Oregon CAT. Professional renderings are not anticipated in this allowance.

Thank you for the opportunity to submit this proposal letter for your consideration.

Sincerely,

Leslie Cliffe, Associate Principal  
Bora Architects Inc.







# Clackamas Heights Redevelopment Plan

## Proposed Engagement Scope

### Task 1: Project Management and Team Meetings

#### Task 1.1: Project Management

Cascadia Partners will attend project management meetings with HACC and the consultant team to plan and coordinate on key project milestones and deliverables. This also includes an initial meeting with the relocation consultant to coordinate on engagement and communications effort. We will rely on HACC to be a conduit for the relocation consultant to ensure our outreach approach and messaging is aligned with relocation efforts.

#### *Deliverables:*

- Attend project management meetings (up to 18)

### Task 2: Research and Stakeholder Identification

#### Task 2.1: Past Engagement Review

In preparation for engagement, Cascadia Partners recommends gathering engagement outcomes and feedback from past and recent HACC projects and reviewing key findings. This will help the team build the engagement approach off of past community feedback and avoid duplication and engagement fatigue. Cascadia Partners will draft a summary presentation of key findings from past engagement.

#### Task 2.2: Stakeholder Identification & Database Management

The engagement process will prioritize engagement with existing residents at the property and another HACC property near the site. We will also work with HACC and the CAC on building a stakeholder database that identifies other key stakeholders who should be engaged in the process and their anticipated level of involvement including resident services, service providers, neighborhood associations, adjacent neighborhood residents and business owners, and any other priority populations that may have an interest or potential influence.

#### *Deliverables:*

- Summary notes of key findings from past engagement
- Stakeholder database

### Task 3: Needs Assessment Engagement (Phase 1)

#### Task 3.1: In-person Listening session

Cascadia Partners proposes conducting up to one (1) listening session with current residents of Clackamas Heights and the other HACC property nearby to understand resident needs and desires for future





redevelopment to inform options for unit sizes, design and building types, unit count, site amenities, infrastructure upgrades, and phases of development. This listening session will also provide an opportunity to recruit members for the CAC. We will develop up to one (1) informational sheet to use for outreach to residents and garner interest. Cascadia Partners will develop a draft and final annotated agenda for the listening session that will act as a run-of-show and outline talking points, staff roles, activities, communications, and material needs.

### **Task 3.2: Online Listening session**

Cascadia Partners proposes conducting up to one (1) online listening session with community partners, neighbors, and the neighborhood association to understand community needs and desires for future redevelopment to inform options for unit sizes, design and building types, unit count, site amenities, infrastructure upgrades, and phases of development. This listening session will also provide an opportunity to recruit members for the CAC. Cascadia Partners will develop a draft and final annotated agenda for the listening session that will act as a run-of-show and outline talking points, staff roles, activities, communications, and material needs.

### **Task 3.3: One-on-one interviews with resident services coordinators/service providers**

We also propose conducting 1-hr interviews with HACC resident services coordinators or service providers (up to 3) to gather feedback and insights about resident needs, challenges, and priorities for a future redevelopment. We will develop an interview plan that will include an agenda, interview questions, and materials.

### **Task 3.4 : Engagement Summary Presentation**

Cascadia Partners will synthesize the feedback results from the listening session and interviews into summary presentation. The presentation will include a summary of the engagement approach and key takeaways from the workshop.

#### ***Deliverables:***

- Attend and facilitate listening session with current residents of Clackamas Heights (up to 1)
- Attend and facilitate online listening session with community partners, neighbors, and the neighborhood association (up to 1)
- Draft and final annotated agenda for listening sessions (up to 2)
- Project information sheet (up to 1)
- 1-hr Interviews with resident services coordinators or service providers (up to 3)
- Draft and final interview plan and materials (up to 1)
- Summary presentation of listening sessions and interviews

### **Task 4: Program Investigation and Preliminary Project Goals Engagement (Phase 2)**

We understand that the engagement objective of this Phase 2 deliverable is to gather feedback on initial program goals and development options based on the Preferred Concept Financial Analysis in Phase 1.



This will help set the parameters for what is on and off the table for future redevelopment with community stakeholders so they can provide informed feedback on desired programs and development.

#### **Task 4.1: CAC Meeting 1 - Vision Workshop**

We propose a kickoff meeting for the CAC to learn more about the redevelopment project and cottage cluster model, clarify their roles as a CAC member, set expectations about what is and is not possible on the site, and provide an opportunity for the CAC to weigh in on a vision for redevelopment. We will vet our approach for the Community Vision Workshop and refine the workshop approach as needed. We will rely on the design team to provide workshop materials.

Cascadia Partners will prepare a draft and final agenda, facilitate a 2-hour workshop with the CAC. Cascadia Partners will provide meeting notes and feedback summaries after the CAC meeting for HACC and design team review. We will rely on HACC to secure meeting spaces, lead member recruitment of 10-15 members, act as the primary point of contact for CAC members, and support with coordinating compensation for CAC members. Cascadia Partners will provide recommendations for potential candidates to recruit for the CAC.

#### **Task 4.2: In-person Community Vision Workshop**

We propose one in-person community workshop preferably located at Clackamas Heights inviting current residents, resident service coordinators, the CAC and other identified stakeholders to learn more about the redevelopment project and cottage cluster model, set expectations about what is and is not possible on the site and provide an opportunity for stakeholder to weigh in on a vision for redevelopment. Workshop activities could include, but not limited to, interactive mapping exercises, visual preference surveys, live polling, and walking tours. Cascadia Partners will develop a draft and final annotated agenda (or run-of-show), provide facilitation services, and coordinate meeting logistics and accessibility needs (language translation/interpretation, food/beverages, and childcare). We will rely on the design team to provide workshop materials including drawings, illustrations, graphics, and concept narratives.

#### **Task 4.3: Community Survey**

We propose creating a community survey to allow HACC residents who are unable to attend the workshop to weigh in. The surveys can also be shared with residents at other HACC developments if appropriate. We will collect demographic information from participants to understand who we are reaching and tabulate responses by different priority populations. Cascadia Partners will provide a summary presentation of outcomes from the community workshop and survey.

#### **Task 4.4: Outreach and Communications Materials**

We will develop up to two (2) outreach materials to promote the event and survey such as an event flyer, poster, or postcard. We will coordinate translation of outreach materials with a vendor for up to one language. We will provide materials that are visually compelling, accessible, and easy-to-understand.

#### **Task 4.5: Engagement Summary Presentation**



Cascadia Partners will synthesize the feedback results from the workshop and survey into summary presentation. The presentation will include a summary of the engagement approach, activities, results, and key takeaways from the workshop.

**Deliverables:**

- Attend and facilitate CAC Workshop (up to 1)
- CAC draft and final agendas and meeting summaries (up to 1)
- Attend and facilitate Community Workshop (up to 1)
- Draft and final annotated agenda for Community Workshop (up to 1)
- Up to two (2) draft and one final community survey
- Draft and final outreach materials (up to 2)
- Summary presentation of listening session and interviews

**Task 5: Design Workshop (Phase 2)**

We understand that the engagement objective of the Design Workshop in Phase 2 is to refine a preferred set of design and development priorities based on feedback from Task 4. This will be an opportunity to report back to residents about what we heard, how it was integrated into a draft preferred development plan, and continue to shape into a final development plan.

**Task 5.1: CAC Meeting 2 - Design Workshop**

Similar to Task 4, we propose a design meeting for the CAC to confirm what we heard at the first community workshop, learn how community feedback was translated into program elements, design principles, spatial arrangements, and phasing plans, and other community preferences, and further shape and refine a draft development concept. We will vet our approach for the Community Design Workshop and refine the workshop approach as needed. We will rely on the design team to provide workshop materials.

Cascadia Partners will prepare a draft and final agenda, facilitate a 2-hour workshop with the CAC. Cascadia Partners will provide meeting notes and feedback summaries after the CAC meeting for HACC and design team review. We will rely on HACC to secure meeting spaces, coordinate scheduling, act as the primary point of contact for CAC members, and support with coordinating compensation for CAC members.

**Task 5.2: In-person Community Design Workshop**

Similar to Task 4, we propose one in-person community workshop preferably located at Clackamas Heights inviting current residents, resident service coordinators, the CAC and other identified stakeholders to confirm what we heard at the first community workshop, learn how their feedback was translated into program elements, design principles, spatial arrangements, and phasing plans, and other community preferences, and further shape and refine a draft development concept. Workshop activities could include, but not limited to, interactive mapping exercises, visual preference surveys, and live polling.



Cascadia Partners will develop a draft and final annotated agenda (or run-of-show), provide facilitation services, and coordinate meeting logistics and accessibility needs (language translation/interpretation, food/beverages, and childcare). We will rely on the design team to provide workshop materials including drawings, illustrations, graphics, and concept narratives.

### **Task 5.3: Community Survey**

We propose creating a community survey to allow community members who are unable to attend the workshop to weigh in. The surveys can also be shared with residents at other HACC developments if appropriate. We will collect demographic information from participants to understand who we are reaching and tabulate responses by different priority populations. Cascadia Partners will provide a summary presentation of outcomes from the community workshop and survey.

### **Task 5.4: Outreach and Communications Materials**

We will develop up to two (2) outreach materials to promote the event and survey such as an event flyer, poster, or postcard. We will coordinate translation of outreach materials with a vendor for up to one language. We will provide materials that are visually compelling, accessible, and easy-to-understand.

### **Task 5.5: Engagement Summary Presentation**

Cascadia Partners will synthesize the feedback results from the workshop and survey into summary presentation. The presentation will include a summary of the engagement approach, activities, results, and key takeaways from the workshop.

#### ***Deliverables:***

- Attend and facilitate Community Workshop (up to 1)
- Draft and final annotated agenda for Community Workshop (up to 1)
- Up to two (2) draft and one final community survey
- Draft and final outreach materials (up to 2)
- Summary presentation of listening session and interviews

### **Task 6: Preferred Development Plan (Phase 2)**

We understand that the engagement objective of the preferred development plan in Phase 2 is to present to the community a final preferred development plan to move forward in the next phase of development. This will be an opportunity to learn how feedback from Task 5 was integrated into a final preferred plan, gather general feedback, and learn more about next steps for redevelopment.

#### **Task 6.1: CAC Meeting 3 - Preferred Development Plan**

We propose a pre-Open House meeting with the CAC to reveal the preferred development plan, share how community feedback is reflected in the design concepts and plan, and discuss site programming. We will vet our approach for the Open House and refine the workshop approach as needed. We will rely on the design team to provide meeting materials.





Cascadia Partners will prepare a draft and final agenda, facilitate a meeting with the CAC (up to 2 hours). Cascadia Partners will provide meeting notes and feedback summaries after the CAC meeting for HACC and design team review. We will rely on HACC to secure meeting spaces, coordinate scheduling, act as the primary point of contact for CAC members, and support with coordinating compensation for CAC members.

#### **Task 6.2: In-person Open House**

We propose facilitating an in-person community open house for community members and the Neighborhood Association to reveal the preferred development plan and share how community feedback is reflected in the design concepts and plan. This event can be held on site with scheduled walking tours as well. Cascadia Partners will develop a draft and final annotated agenda (or run-of-show), provide facilitation services, coordinate meeting logistics and accessibility needs (language translation/interpretation, food/beverages, and childcare). We will rely on the design team to provide Open House materials including drawings, illustrations, graphics, and concept narratives.

#### **Task 6.3: Online Open House (StoryMap)**

To supplement the in-person open house, we propose developing an online open house using ArcGIS StoryMap. This is an online storytelling tool to share information in a dynamic and interactive way and solicit general feedback about the preferred concept. This provides an opportunity to inform and close the loop with current residents and neighboring residents on the project and learn about future plans and next steps for the site.

#### **Task 6.4: Outreach Materials**

We will develop up to one (1) outreach materials to promote the event and survey such as an event flyer, poster, or postcard. We will coordinate translation of outreach materials with a vendor for up to one language. We will provide materials that are visually compelling, accessible, and easy-to-understand.

#### ***Deliverables:***

- Attend and facilitate in-person open house (up to 1)
- Draft and final annotated agenda for open house (up to 1)
- Up to two (2) draft and one final online open house
- Draft and final outreach materials (up to 1)



## Proposed Budget

Clackamas Heights Redevelopment RFP	Cascadia Partners			Total Hours	Cost
	Principal	Senior Associate	Associate		
<i>Hourly Rate</i>	220	175	155		
<b>Task 1: Project Management</b>	18	18	0	36	\$7,110
Task 1.1: Attend Project Team Meetings	18	18		36	\$7,110
<b>Task 2: Research and Stakeholder Identification</b>	3	3	10	16	\$2,735
Task 2.1: Past Engagement Review	1	1	5	7	\$1,170
Task 2.2: Stakeholder Identification / Database Mgmt	2	2	5	9	\$1,565
<b>Task 3: Needs Assessment Engagement (Phase 1)</b>	23	42	49	114	\$20,005
Task 3.1: In-person Listening session (up to 1)	10	16	20	46	\$8,100
Task 3.2: Online Listening session (up to 1)	8	12	15	35	\$6,185
Task 3.2: One-on-one interviews with resident services coordinators/service providers (up to 3)	3	10	6	19	\$3,340
Task 3.3: Engagement Summary Presentation	2	4	8	14	\$2,380
<b>Task 4: Program Investigation and Preliminary Project Goals Engagement (Phase 2)</b>	20	34	59	113	\$19,495
Task 4.1: CAC Meeting 1 - Vision Workshop	6	10		16	\$3,070
Task 4.2: In-person Community Vision Workshop	4	10	10	24	\$4,180
Task 4.3: Community Survey	4	10	25	39	\$6,505
Task 4.4: Outreach and Communications Materials (up to 2)	4		16	20	\$3,360
Task 4.5: Engagement Summary Presentation	2	4	8	14	\$2,380
<b>Task 5: Design Workshop (Phase 2)</b>	18	34	55	107	\$18,435
Tasks 5.1: CAC Meeting 2 - Design Workshop	6	10		16	\$3,070
Tasks 5.2: In-person Community Design Workshop	4	10	10	24	\$4,180
Task 5.3: Community Survey	4	10	25	39	\$6,505
Task 5.4: Outreach and Communications Materials (up to 2)	2		12	14	\$2,300
Task 5.5: Engagement Summary Presentation	2	4	8	14	\$2,380
<b>Task 6: Preferred Development Plan (Phase 2)</b>	18	34	32	84	\$14,870
Task 6.1: CAC Meeting 3 - Preferred Development Plan	6	10		16	\$3,070
Task 6.2: In-person Open House	4	8	4	16	\$2,900
Task 6.3: Online Open House (StoryMap)	6	12	20	38	\$6,520
Task 6.4: Outreach and Communications Materials (up to 1)	2	4	8	14	\$2,380
<b>Total</b>	<b>97</b>	<b>162</b>	<b>195</b>	<b>454</b>	<b>\$82,650</b>
<b>Expenses Total</b>					<b>\$10,800</b>
CAC Compensation (\$100/member/per meeting; up to 15 members)					\$4,500
Stakeholder Compensation (three \$50 gift cards for each event x 4)					\$600
Translation/Interpretation (Up to 1 language for 2 Workshops, Open House, Outreach materials, Surveys)					\$5,000
Childcare					\$200
Food/Beverage					\$500
<b>Grand Total</b>					<b>\$93,450</b>

## METRO CONTRACT - EXHIBIT C

### Clackamas Heights Redevelopment Plan | Housing Authority of Clackamas County

#### Project Milestones, Deliverables, and Disbursement of Grant Funds

PROJECT MILESTONE AND SPECIFIED GRANT DELIVERABLES		DATE DUE	PROGRESS PAYMENT
1	<b>Execution of grant agreement</b> a) Complete project documents b) Signed and executed IGA	Feb. 29, 2024	
2	<b>Needs Assessment Engagement</b> a) In-person listening session b) Online listening session c) Service provider interviews d) Documentation and summary of engagement findings and themes	Mar. 8, 2024	\$63,500
3	<b>Program Investigation &amp; Project Goals</b> a) Community Advisory Committee (CAC) roster b) CAC Meeting #1: In-person community vision workshop c) Community survey d) Documentation of engagement and summary presentation	Mar. 22, 2024	\$75,500
4	<b>Design Workshop</b> a) Preliminary site diagrams and design concept alternatives b) CAC Meeting #2: In-person community design workshop c) Community survey d) Documentation of engagement and summary presentation	Apr. 19, 2023	\$56,600
5	<b>Final Development Plan</b> a) Identify preferred development plan option b) CAC Meeting #3: In-person reveal of preferred development plan c) Public in-person open house d) Online open house (StoryMap) e) Final Development Plan (including land use approvals and entitlements, infrastructure plan, traffic impact analysis, and sustainability plan)	Jun. 26, 2024	\$169,400

**METRO CONTRACT - EXHIBIT C**  
**Clackamas Heights Redevelopment Plan | Housing Authority of Clackamas County**

Continued

6	<b>Commission Action for Project Closeout</b> a) Public meeting or hearing of the County Board of Commissioners to consider accepting and endorsing the Clackamas Heights Redevelopment Plan		\$5,000
7	<b>Grant Completion Documentation</b> a) Final financial report submitted and backup documentation retained on file as appropriate b) Final reporting on grant performance measures submitted and approved by Metro		\$5,000

**APPROVED GRANT PROJECT EXPENSE DISTRIBUTION**

Changes to the approved expense distribution shown at right must be approved by Metro through an amendment of this Exhibit C.	Consultant Fees	\$353,300
	Direct Expenses	\$21,700
	Contingency reserves	\$ 0
	<b>TOTAL METRO GRANT FUNDS</b>	<b>\$375,000</b>
	TOTAL CLACKAMAS COUNTY FUNDS	\$



# Financial Assistance Application Lifecycle Form

Use this form to track your potential award from conception to submission.

Sections of this form are designed to be completed in collaboration between department program and fiscal staff.

**If renewal, complete sections 1, 2 & 4 only. If direct appropriation, complete page 1 and Dept/Finance signatures only.**

**If Disaster or Emergency Relief Funding, EOC will need to approve prior to being sent to the BCC**

**\*\*CONCEPTION\*\***

## Section I: Funding Opportunity Information - To Be Completed by Requester

Award type:  Direct Appropriation (no application)  Subrecipient Award  Direct Award

Award Renewal?  Yes  No

<b>Lead Fund # and Department:</b>	40 - H3S - Housing Authority
<b>Name of Funding Opportunity:</b>	Metro 2040 Equitable Development Grant

Funding Source:  Federal – Direct  Federal – Pass through  State  Local

Requestor Information: (Name of staff initiating form)	Devin Ellin - HACC Director of Development
Requestor Contact Information:	dellin@clackamas.us; - 971.227.0472
Department Fiscal Representative:	Darren Chilton
Program Name & Prior Project #: (please specify)	Hillside Park Redevelopment - Clackamas County Housing Authority/Development

### Brief Description of Project:

This grant will be used toward pre-development activities for the Clackamas Heights Redevelopment project. HACC is working to create an informed concept plan and identify the steps necessary to redevelop the underutilized 16.5-acre Clackamas Heights public housing site in Oregon City. The overarching goal of the redevelopment project is to transform the aging Clackamas Heights Public Housing complex into a vibrant community that provides safe and sustainable housing options affordable to current and future residents of the community. HACC aims to replace the existing housing--consisting of 100 units of near obsolete public housing--with up to 250 new units. The plan will be a comprehensive assessment of the opportunities, constraints, community and resident needs, and design objectives. The success of the planning effort will hinge on a comprehensive and diverse public engagement process designed to solicit feedback from current residents, the surrounding neighborhood, local businesses, city and county officials, and other stakeholders.

Name of Funding Agency: Metro

Notification of Funding Opportunity Web Address: <https://www.oregonmetro.gov/tools-partners/grants-and-resources/2040-planning-and-development-grants>

### OR

Application Packet Attached:  Yes  No

Completed By: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\* NOW READY FOR SUBMISSION TO DEPARTMENT FISCAL REPRESENTATIVE \*\***

## Section II: Funding Opportunity Information - To Be Completed by Department Fiscal Rep

Competitive Application  Non-Competing Application  Other

Assistance Listing Number (ALN), if applicable:	n/a	Funding Agency Award Notification Date:	September 29, 2023
Announcement Date:	May 24, 2023	Announcement/Opportunity #:	2040 Planning and Development Grants - Cycle 11
Grant Category/Title	2040 Planning and Development Grants	Funding Amount Requested:	\$375,000
Allows Indirect/Rate:	No	Match Requirement:	No
Application Deadline:	August 11, 2023	Total Project Cost:	TBD
Award Start Date:	Fall 2023	Other Deadlines and Description:	n/a
Award End Date	Fall 2025		
Completed By:	Fall 2025	Program Income Requirements:	n/a
Pre-Application Meeting Schedule:	Open house: 6/7/2023; LOI 1:1 Call: 7/19/2023		

Additional funding sources available to fund this program? Please describe:  
Affordable Housing Bond Funds, HUD disposition and RAD funds, State and Local funding sources, Grants

How much General Fund will be used to cover costs in this program, including indirect expenses?  
No county general funds are involved.

How much Fund Balance will be used to cover costs in this program, including indirect expenses?  
n/a

## In the next section, limit answers to space available.

### Section III: Funding Opportunity Information - To Be Completed at Pre-Application Meeting by Dept Program and Fiscal Staff

#### Mission/Purpose:

1. How does the grant/funding opportunity support the Department and/or Division's Mission/Purpose/Goals?

The redevelopment of Clackamas Heights aligns with the Housing Authority and the County's Performance Clackamas goal of ensuring safe, healthy and secure communities by replacing 100 units of near-obsolete public housing with up to 200+ units of newly constructed affordable housing.

2. Who, if any, are the community partners who might be better suited to perform this work?

N/A

3. What are the objectives of this funding opportunity? How will we meet these objectives?

Equitable development grants are multi-year grants that aim to spur economic growth and development within communities while advancing specific equity-focused projects, programs or strategies that improve opportunities and quality of life for people of color and historically marginalized communities.

Redevelopment planning will include stakeholder outreach and community engagement initiatives that will help inform the site design and envision the concept plan with the goal of delivering equitable planning and development outcomes. Outreach and engagement efforts will be designed to ensure people of color and historically excluded groups can lend a strong and meaningful voice that will inform decisions and planning outcomes.

4. Does the grant/financial assistance fund an existing program? If yes, which program? If no, what is the purpose of the program?

Yes, this grant will support HACC's public housing repositioning and development program.

#### Organizational Capacity:

1. Does the organization have adequate and qualified staff? If no, can staff be hired within the grant/financial assistance funding opportunity timeframe?

Yes, HACC's Development Team has the capacity oversee this project. Currently, HACC is working through the final stages of a competitive procurement process to select the design team to lead the redevelopment planning work.

2. Are there partnership efforts required? If yes, who are we partnering with and what are their roles and responsibilities?

Yes; partnership efforts are required. HACC Resident Advisory Board and current Clackamas Heights residents will serve as community partners throughout the planning process.

3. If this is a pilot project, what is the plan for sun setting the project and/or staff if it does not continue (e.g. making staff positions temporary or limited duration, etc.)?

n/a

4. If funded, would this grant/financial assistance create a new program, does the department intend for the program to continue after initial funding is exhausted? If yes, how will the department ensure funding (e.g. request new funding during the budget process, supplanted by a different program, etc.)?

No; this will add to other funding sources to further the redevelopment of Clackamas Heights.

**Collaboration**

1. List County departments that will collaborate on this award, if any.  
H3S - Housing Authority of Clackamas County & Housing and Community Development

**Reporting Requirements**

1. What are the program reporting requirements for this grant/funding opportunity?  
TBD

2. How will performance be evaluated? Are we using existing data sources? If yes, what are they and where are they housed? If not, is it feasible to develop a data source within the grant timeframe?  
TBD

3. What are the fiscal reporting requirements for this funding?  
TBD

**Fiscal**

1. Are there other revenue sources required, available, or will be used to fund the program? Have they already been secured? Please list all funding sources and amounts.  
Affordable Housing Bonds and other funding sources as identified throughout the project.

2. For applications with a match requirement, how much is required (in dollars) and what type of funding will be used to meet it (CGF, In-kind, local grant, etc.)?  
n/a

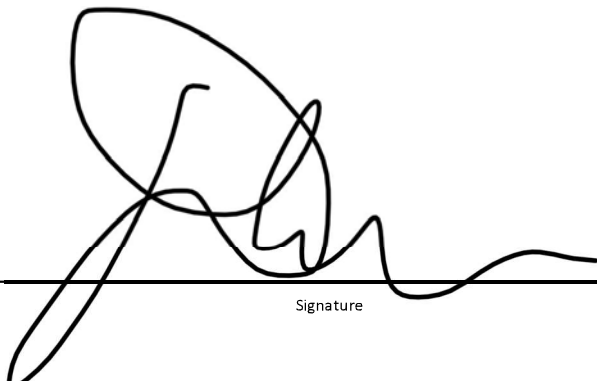
3. Does this grant/financial assistance cover indirect costs? If yes, is there a rate cap? If no, can additional funds be obtained to support indirect expenses and what are those sources?  
This grant does not cover indirect costs. HACC has identified other funds including project developer fees, Affordable Housing Bond admin funds, and other local and state grants that can cover indirect costs.

Other information necessary to understand this award, if any.  
n/a

Program Approval:

Devin Ellin

7/26/2023



Name (Typed/Printed)

Date

Signature

**\*\* NOW READY FOR PROGRAM MANAGER SUBMISSION TO DIVISION DIRECTOR \*\***

**\*\*ATTACH ANY CERTIFICATIONS REQUIRED BY THE FUNDING AGENCY. COUNTY FINANCE OR ADMIN WILL SIGN\*\***

Section IV: Approvals

DIVISION DIRECTOR (or designee, if applicable)

Toni Karter

7/26/2023

*Toni Karter*

Name (Typed/Printed)

Date

Signature

DEPARTMENT DIRECTOR (or designee, if applicable)

Adam Brown

7/26/2023

Adam Brown

Digitally signed by Adam Brown  
Date: 2023.07.31 08:05:27 -07'00'

Name (Typed/Printed)

Date

Signature

FINANCE ADMINISTRATION

Elizabeth Comfort

7/26/2023

*Elizabeth Comfort*

Name (Typed/Printed)

Date

Signature

EOC COMMAND APPROVAL **WHEN NEEDED FOR DISASTER OR EMERGENCY RELIEF APPLICATIONS ONLY**

Name (Typed/Printed)

Date

Signature

Section V: Board of County Commissioners/County Administration

(Required for all grant applications. If your grant is awarded, all grant **awards** must be approved by the Board on their weekly consent agenda regardless of amount per local budget law 294.338.)

**For applications less than \$150,000:**

COUNTY ADMINISTRATOR	Approved: <input type="checkbox"/>	Denied: <input type="checkbox"/>
Name (Typed/Printed)	Date	Signature

**For applications up to and including \$150,000 email form to Tracy Moreland at [TracyMor@clackamas.us](mailto:TracyMor@clackamas.us) for Gary Schmidt's approval.**

**For applications \$150,000 and above, email form with Staff Report to the Clerk to the Board at [ClerktotheBoard@clackamas.us](mailto:ClerktotheBoard@clackamas.us) to be brought to the consent agenda.**

BCC Agenda item #:

Date:

OR

Policy Session Date:

*Gary Schmidt*

County Administration Attestation

County Administration: re-route to department at

and

Grants Manager at [financegrants@clackamas.us](mailto:financegrants@clackamas.us)

when fully approved.

Department: keep original with your grant file.