

# CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

## Policy Session Worksheet

**Presentation Date:** Sept. 4, 2018    **Approx. Start Time:** 11 am    **Approx. Length:** 45 min

**Presentation Title:** Intergovernmental Agreement (IGA) for Park Avenue Development & Design Standards Project, Metro 2040 Planning & Development Grant

**Department:** Department of Transportation & Development (DTD), Long-Range Planning Program

**Presenters:** Dan Johnson, Director, Transportation and Development; Karen Buehrig, Transportation Planning Supervisor; Terry Gibson, chair, McLoughlin Area Plan Implementation Team (MAP-IT),

**Other Invitees:** Jennifer Hughes, Planning Manager, Lisa Miles, Metro

### WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

Authorization to advance the IGA for the Park Avenue Development & Design Standards Project – Metro 2040 Planning and Development Grant as a consent item at the September 13, 2018 BCC Business Meeting.

### EXECUTIVE SUMMARY:

In 2017 Clackamas County, in response to a community request, applied for a Metro 2040 Planning Development Grant for the Park Avenue Development and Design Standards for unincorporated Clackamas County lands approximately ½ mile from the Park Avenue Light Rail Station. The project is intended to provide an inclusive and innovative public engagement process, an assessment of neighborhood livability and economic vitality, and ultimately to revise development and design standards on commercial land around the Park Ave Light Rail station to support a more walkable, transit-oriented environment.

On October 24, 2017, Clackamas County received notice that it was awarded an \$180,000 2040 Planning and Development Grant by Metro for the proposed project. The County will match the grant amount with \$45,000 of in-kind support. We expect the project will take a total of 18 months to complete, including final adoption of development and design standards.

The original request for funding was made in partnership with the McLoughlin Area Plan Implementation Team (MAP-IT) to support the 2017-18 Long-Range Planning Work Program item on working with the community to submit an application to fund a community outreach process to engage property owners about the development and design standards. Over the past eight months, we have been working with community members to prepare a Scope of Work for the project. A draft of this Scope is included in the IGA with Metro.

The plan is for this project to be undertaken in two phases.

- **Phase I** will focus on a community assessment including researching community demographics and organizations as well as existing policies, plans and development conditions. There will be an assessment of the public's understanding of the

McLoughlin Area Plan (MAP) vision and related policy considerations. In addition, an initial livability assessment, with a review of the potential impact of gentrification, will be conducted. Phase I will also provide the opportunity to develop an extensive, innovative and inclusive public engagement process for Phase II.

At the end of Phase I, there will be a presentation to the BCC about what was learned during the community assessment to provide the BCC with the opportunity to provide direction for the project's next steps and give authorization to proceed with Phase II of the project.

- **Phase II** will focus on the technical work and community engagement to present options to code refinements. An extensive and inclusive public engagement process, as recommended through Phase I, will be employed to ensure all segments of the residential and business community have ample opportunity to participate in the project. The anticipated outcome of this grant process is the development of Zoning Development Code and map amendments for commercially-zoned areas. In addition, there will be recommendations for implementation tools and community development strategies. Proposed amendment to the ZDO will be brought forward through the usual public hearing processes with the Planning Commission and Board, with final adoption by the Board of County Commissioners.

The IGA, including the draft Scope of Work for Phase I of the project, is attached. The IGA has been reviewed and approved by County Counsel.

#### **FINANCIAL IMPLICATIONS (current year and ongoing):**

Approving the IGA will allow the County to move forward with the contracting process to implement the grant award. This project is included within the 2018-19 Long Range Planning Work program

#### **STRATEGIC PLAN ALIGNMENT**

- How does this item align with your Department's Strategic Business Plan goals?

This project aligns with the purpose of the Long-Range Planning Program to provide information to County decision makers so they can plan and invest based on a coordinated set of goals and policies that guide future development.

- How does this item align with the County's Performance Clackamas goals?

This project is consistent with the County's Performance goals of

- Grow a Vibrant Economy
- Build Public Trust through Good Government

**LEGAL/POLICY REQUIREMENTS:** None

#### **PUBLIC/GOVERNMENTAL PARTICIPATION:**

The MAP-IT committee representative, local land owners and business representatives, and Metro and Clackamas County staff have diligently worked together to develop and agree upon the IGA and RFP materials.

**OPTIONS:**

Option 1: Place the Park Avenue Development and Design Standards IGA on an upcoming BCC Business Meeting agenda as a consent item.

Option 2: Request revisions to the IGA before it is moved forward to a BCC business meeting agenda as a consent item.

**RECOMMENDATION:**

Option 1: Place the Park Avenue Development and Design Standards IGA on an upcoming BCC Business Meeting agenda as a consent item.

**ATTACHMENT: Draft Park Avenue Development & Design Standards IGA & RFP packet**

**SUBMITTED BY:**

Division Director/Head Approval \_\_\_\_\_

Department Director/Head Approval \_\_\_\_\_

County Administrator Approval \_\_\_\_\_

For information on this issue or copies of attachments, please contact Karen Buehrig @ 503-742-4683
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**2040 PLANNING AND DEVELOPMENT GRANT  
INTERGOVERNMENTAL AGREEMENT  
Metro – Clackamas County  
Park Avenue Development and Design Standards**

This 2040 Planning and Development Grant Intergovernmental Agreement (“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 Clackamas County (“County”), through its Department of Transportation and Development, a municipal corporation, located at 150 Beaver Creek Road, Oregon City, OR 97045, collectively referred to as “Parties.”

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, the County has submitted a 2040 Planning and Development Grant Request (“Grant Request”) for the Park Avenue Development and Design Standards Project (“Project”); and

WHEREAS, Metro has agreed to provide 2040 Planning and Development Grant Funds (“Grant Funds”) to the County for the Project in the amount of \$180,000 subject to the terms and conditions set forth herein, and the parties wish to set forth the funding amounts, timing, procedures and conditions for receiving grant funding from existing CET funds for the Project.

NOW THEREFORE, the Parties hereto agree as follows:

1. Metro Grant Award. Metro shall provide Grant Funds to the County for the Project as described in the Grant Request, attached hereto as Exhibit A and incorporated herein subject to the terms and conditions specified in this Agreement and subject to any specific funding conditions recommended by the Metro Chief Operating Officer and adopted by the Metro Council in Resolution No. 17-4846.
2. Project Management and Coordination. The Parties have appointed the staff identified below to act as their respective Project Managers with the authority and responsibility described in this Agreement:

For the County:           Karen Buehrig  
                                  Transportation Planning Supervisor  
                                  Clackamas County Department of Transportation and Development  
                                  150 Beaver Creek Road  
                                  Oregon City, OR 97405  
                                  KarenB@co.clackamas.or.us  
                                  503-742-4683

For Metro:                Lisa Miles  
                                  Principal Project Manager  
                                  2040 Planning and Development Grants  
                                  Metro  
                                  600 NE Grand Avenue  
                                  Portland, OR 97232  
                                  Lisa.Miles@oregonmetro.gov  
                                  503-797-1877

In the event the County needs to assign a new Project Manager other than the individual named in the original grant application, the County will present in writing to Metro the qualifications and experience of the proposed new Project Manager. Metro shall have the opportunity to review the qualifications and may reject a proposed Project Manager who Metro deems unqualified.

3. Mutual Obligations of both the County 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, Phase I: The Project Managers will work together to identify consultants best qualified to perform the scope of work for Phase I: Park Avenue Station Area Community Assessment, attached hereto as Exhibit B. One deliverable for Phase I will be proposed revisions, as deemed appropriate, to a consultant scope of work and proposed RFP for Phase II. The proposed RFP will be approved by the Board of County Commissioners prior to the commencement of Phase II.

(b) Selection of Consultants, Phase II: Once approved by the Board of County Commissioners, the RFP for Phase II consulting services will be released. The Project Managers and any additional reviewers selected by the Parties and approved by the Board of County Commissioners will jointly review proposals from consultants and select a mutually agreeable consultant team to perform the work required to successfully complete the Project.

(c) Preliminary Schedule of Milestones. The Parties have agreed to a preliminary schedule of milestones for completion of Phase I of the Project, which are attached hereto as Exhibit C. This preliminary schedule of milestones will be incorporated into the contract between the County and the consultants hired for Phase I of the Project.

(d) Revised Schedule of Milestones. After Phase I has been completed and the Project Managers have selected a consultant team as described in subsection 3(b), the Parties to this Agreement expressly delegate authority to the Project Managers to prepare a revised schedule of milestones that will provide more detailed performance timelines for Phase II of the Project, including specific consultant and/or County deliverables for each milestone, and establish the amount of grant funds to be disbursed by Metro upon satisfactory completion of each milestone. The Parties agree that the revised schedule of milestones agreed upon by the Project Managers will replace the preliminary schedule attached hereto, and will become the final and binding Exhibit C to this Agreement (“Revised Exhibit C”), unless and until it is later amended as allowed under paragraph 9 of this Agreement. The revised schedule of milestones will be incorporated into the contract between the County and the consultants hired for Phase II of the Project.

(e) Project Committee(s). The consultant team hired for Phase I of the project will develop a recommendation for the governance structure and any advisory committees to be formed in Phase II of the project. Working with the consultant team, the Project Managers will help to define the recommended 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(s). The Board of County Commissioners shall review and approve the proposed committee structure, membership, and scope of authority, which will then be integrated into the Scope of Work and RFP for Phase II.

4. County Responsibilities. The County shall perform the Project described in the Grant Request, attached as Exhibit A, and as specified in the milestones set forth in Revised Exhibit C, subject to the terms and conditions specified in this Agreement and subject to any funding conditions recommended by the Metro Chief Operating Officer and adopted by the Metro Council in Resolution No. 17-4846. The County shall obtain all applicable permits and licenses from local, state or federal agencies or governing bodies related to the Project.

(a) Use of Grant Funds. The County shall use the Grant Funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the deliverables and/or milestones as set forth in this Agreement. In the event that unforeseen conditions require adjustments to the Project scope, approach or schedule, the County shall obtain Metro’s prior written approval before implementing any revisions to the Project.

(b) Consultant Contract(s).

1) After the Project Managers have agreed on the scope of work for Phase I, and agreed on a consultant team to perform the scope of work, the County shall enter into a contract(s) with the selected consultant team to complete the initial milestones and deliverables described in Exhibit C. The contract(s) entered into by the County shall reference this Agreement, including the schedule of milestones set forth in Exhibit C.

2) After the Project Managers, and others as determined, have selected the consultant team for Phase II of the Project, and completed the Revised Exhibit C schedule of milestones as described above in section 3, the County shall enter into a contract(s) with the selected consultant team to complete the remaining Project milestones and deliverables described in Revised Exhibit C. The contract(s) entered into by the County shall reference this Agreement, including the schedule of milestones set forth in Revised Exhibit C.

(c) Submittal of Grant Deliverables. Within 30 days after completing each milestone for the Project, as described in Revised Exhibit C, the County shall submit to Metro all required deliverables for the milestone, accompanied by an invoice describing in detail its expenditures as needed to satisfy fiscal requirements. Deliverables must be submitted to Metro separately and sequentially; the County 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) Review and Approval of Grant Deliverables. Within 15 days after receiving the County's submittal of deliverables as set forth in Exhibit C, 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. Metro shall have sole discretion in determining whether the deliverables submitted are satisfactory in meeting the grant requirements. Metro's approval shall not be unreasonably withheld and shall be made comparing the County's submittal to the Project as described in the Grant Request set forth in Exhibit A and the deliverables set forth in Revised Exhibit C.

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

6. Project Records. The County 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 the County for the Project. Records and documents described in this section shall be retained by the County for three years from the date of completion of the project, expiration of the Agreement or otherwise required under applicable law, whichever is later. The County shall provide Metro with such information and documentation as Metro requires for implementation of the grant process. The County 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 County matching funds were expended. Metro and its auditor shall have access to the books, documents, papers and records of the County that are directly related to this Agreement, the Grant Funds provided hereunder or the Project for the purpose of making audits and examinations.

7. Audits, Inspections and Retention of Records. Metro and its representatives shall have full access to and the right to examine, during normal business hours and as often as they deem necessary, all County records with respect to all matters covered by this Agreement. 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 the County 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 Exhibit C.

9. Termination. Metro may terminate this Agreement and cancel any remaining Grant Fund payments upon a finding by the Metro Chief Operating Officer that the County 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 the County.

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. County 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 the County and Metro to authorize the execution of this Agreement; and that the persons signing this Agreement have full power and authority to sign for the County and Metro, respectively.

Metro

Clackamas County

By: \_\_\_\_\_  
Martha Bennett

By: \_\_\_\_\_  
Jim Bernard

Title: Metro Chief Operating Officer

Title: Chair

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

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

Approved as to Form:

Approved as to Form:

By: \_\_\_\_\_  
Nathan Sykes

By: \_\_\_\_\_

Title: Acting Metro Attorney

Title: County Attorney

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

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

- Exhibit A – County’s Grant Request
- Exhibit B – Scope of Work
- Exhibit C – Schedule of Milestones

Metro Contract 935012-Exhibit A  
County's Grant Request

## Project narrative

### Project Name: Park Avenue Development and Design Standards

Note to applicants: All questions and headings are to remain in their current locations in this document. In the space provided after each question, you may use text, bullet lists, tables or other formatting as desired or appropriate to improve the clarity and legibility of your response. Please be succinct; is not necessary to use all of the space provided. Please use 11 point black text, and limit your response to the space allotted for each question. Refer to the evaluation criteria on page 4 of the Handbook, also in ZoomGrants in the "Library" tab.

### Clear development outcomes

#### 1. Clearly describe the proposed project and the specific goals to help facilitate development in your community. (Limit your response to page 1.)

The Park Avenue Development and Design Standards Project (the project) will employ an inclusive and extensive community engagement process to create development and design standards for the Park Avenue Station area. These standards will be crafted to implement the Community Values and Guiding Principles (including those related to economic vitality, inclusiveness, sustainability and design) of the McLoughlin Area Plan, developed and approved by the community from 2008-12, and *The Five Components of the McLoughlin Area Plan*, approved by the Clackamas County Board of Commissioners in 2015. The project will also include an assessment of neighborhood livability and economic diversity in the residential areas surrounding the Park Avenue Station. The intent is for the final outcomes of the project to embody the essence of equitable development and to be applicable as a flexible template for other areas along McLoughlin, as well as other auto-dominated, suburban commercial areas in the region.

The greater Oak Grove/Jennings Lodge area has a high percentage of poverty that is linked to a lack of living-wage jobs and affordable housing. The new development and design standards will allow and encourage an increase in living-wage work opportunities and more affordable housing, and accommodate a greater variety of housing options as well as essential services, open space and access to other amenities. Private sector developers, investors, property owners and community members will work to identify impediments in the current development process, and zoning and development ordinance, suggest actual or hypothetical project sites, test the effectiveness of the proposed development and design standards, and explore implementation strategies.

The intent of the new development and design standards is to encourage and maintain housing and economic diversity along the McLoughlin transit corridor over the next 20 years, and as long as the strategies employed prove to remain effective. Redevelopment often impacts existing affordable housing, half-way houses, weekly rental motels, manufactured home parks, small businesses and other existing commercial uses. The new design and development standards are intended to be ahead of the cycle of gentrification and displacement, and help ensure that clearly identified targets based on community values can be met in spite of market pressure. This is possible through a thoughtful policy planning process, strategies to refine that policy as development occurs and market forces are observed, research, identification of best practices and use of metrics for evaluation.

Employing an inclusive and comprehensive public engagement process throughout the creation of the development and design standards is intended to increase support for the adoption and implementation of feasible, implementable ZDOs and other policy changes to maximize community objectives and attract desired development while maintaining the quality and character of surrounding residential neighborhoods.



# Metro Contract 935012-Exhibit A County's Grant Request

## 2. Provide a high-level description of the scope of work and general timeframe to complete the project. What are the project elements, the deliverables you envision, and the outcomes you seek to achieve? (Limit your response to page 2.)

The project will be led by a consultant team, with support from County staff, community members and stakeholders. The consultant will be expected to work closely with the community to implement the community engagement plan, identify existing conditions, draft and refine development and design standards, test the standards, and produce ZDO amendments and related materials to implement the standards.

### **Project Element 1: *Project Management***

- Deliverable 1.1 IGA between Metro and Clackamas County
- Deliverable 1.2 Finalized scope of work, schedule and budget with consultant team
- Deliverable 1.3 Grant reporting throughout the project

**Outcome:** Smoothly-managed project that delivers results within the expected timeframe and budget

### **Project Element 2: *Community Engagement***

- Deliverable 2.1 Inclusive, comprehensive community engagement plan involving property owners, business owners, community partners, developers, investors, residents and others.
- Deliverable 2.2 Technical and public advisory groups
- Deliverable 2.3 Inclusive and comprehensive community engagement report with metrics

**Outcome:** Inclusive, comprehensive, ongoing community engagement, resulting in knowledgeable, empowered stakeholders, and development and design standards responsive to community needs.

### **Project Element 3: *Existing Conditions, Inventory and Data Compilation***

- Deliverable 3.1 Memo 1: Summary report of existing conditions and market analysis, including usable graphics, that includes existing plans, existing regulatory framework, land inventory, demographics, the natural and built environment, and other area projects.
- Deliverable 3.2 Memo 2: Neighborhood livability and economic diversity assessment that considers potential impacts of new development on surrounding neighborhoods and affordability.
- Deliverable 3.3 Meeting facilitation and summaries implementing public involvement plan

**Outcome:** Well-substantiated information about the commercial area and surrounding neighborhood.

### **Project Element 4: *Draft and Refine Development and Design Standards***

- Deliverable 4.1 Memo 3: Review of best practices in mixed-use zones, with projects, tools and strategies to maximize transit-supportive development, long-term affordability, sustainability, local economy, living-wage work, community health and collaboration
- Deliverable 4.2 Draft development and design standards
- Deliverable 4.3 Memo 4: Summary of draft standards test on actual/hypothetical sites, with illustrated model outcomes, effectiveness evaluation, developer and community buy-in
- Deliverable 4.4 Meeting facilitation and summaries implementing public involvement plan
- Deliverable 4.5 Refined development and design standards

**Outcome:** Development and design standards that achieve community goals; reflect best practices; developer, property owner and public input, and incorporation of lessons learned from tests on actual or hypothetical sites.

### **Project Element 5: *Implementation Strategies***

- Deliverable 5.1 Memo 5: Implementation framework plan, with metrics on community goals, market economics, tool box to use standards and template for other locations on McLoughlin
- Deliverable 5.2 Community engagement plan with a community-centric feedback cycle.
- Deliverable 5.3 Adoption-ready materials, including ZDO amendments that implement the development and design standards, for the Planning Commission and County Commission.

**Outcome:** Clear communication and understandable materials to facilitate adoption and implementation of the new design and development standards.

## Metro Contract 935012-Exhibit A County's Grant Request

### **3. Describe the measures would you use to evaluate the project's success. (Limit your response to top half of page 3)**

Measurements of success will be applied to evaluate the proposed development and design standards, community engagement plan and implementation framework plan. A primary measure of success will be the acceptance and active use of the new ZDO and related policies by the development community. Project success will also be measured by adoption by the Board of Commissioners of recommended development and design standards that align with community values and implement a mixed-use, transit supportive environment along McLoughlin Boulevard near the Park Ave Station.

In order to evaluate success, specific evaluation metrics will be identified in a comprehensive scorecard intended to allow all stakeholders to see and understand the outcomes of the project relative to the original goals. A feedback framework will be established to facilitate adaptive adjustments over time to ensure long-term success, community satisfaction and healthy economic activity.

Success of the community engagement plan will be measured by the level of participation of the community and stakeholders, and by their knowledge, understanding and support of the development and design standards. It will be important to make sure that people engaged in the project reflect current and projected area demographics, including property and business owners, and developers.

The project includes an implementation framework plan with metrics on how well the development and design standards align with community values outlined in the McLoughlin Area Plan and *The Five Components of the McLoughlin Area Plan*. The implementation framework plan will include ways to measure the success of the adopted standards, and understand how they affect neighborhood livability.

### **Advances and complements regional goals and policies**

#### **4. Describe how this project will help to facilitate development while advancing established regional development goals and outcomes. Consider how the project will help to implement the 2040 Growth Concept, its alignment with the Urban Growth Management Functional Plan, and how it will achieve each of the Six Desired Outcomes stated in the Regional Framework Plan. (Limit your response to bottom half of page 3 and top half of page 4.)**

The focus of this project is to facilitate development that implements regional goals and outcomes, and reflects community goals and values. This area along McLoughlin Boulevard is primarily zoned C-3 (General Commercial). This zone discourages mixed-use development near transit stations and other appropriate locations. Other districts along McLoughlin include medium residential (MR-1), medium high density (MR-2) and high density residential (HDR), in which mixed-use is either prohibited or not a primary use.

By focusing on development and design standards around the light rail station, the project implements the 2040 Growth Concept of promoting a mix of uses, and walkable, livable communities in areas with good access to transit. The project will provide tools to allow for the type of development that facilitates the Regional Framework Plan. The project goals align with the outcomes as follows:

- A. *People live, work and play in vibrant communities where their everyday needs are easily accessible.*
  - 1) Enable a significant new supply of mixed-income housing to attract living-wage jobs and a mix of businesses to create a vibrant, activity-filled station community.
  - 2) Design standards to support gathering places, green buildings, parks and restored open spaces.
  - 3) Support access to light rail and buses, and trails to access amenities and services.
  
- B. *Current and future residents benefit from the region's sustained economic competitiveness and prosperity.*

The project is designed to create development and design standards that:

## Metro Contract 935012-Exhibit A County's Grant Request

- 1) Promote development that will attract and support local businesses and living-wage jobs
  - 2) Complement regional economic trends with locally-focused businesses
  - 3) Promote high quality buildings that address housing and employment needs
  - 4) Promote active transportation and transit access to the metro region
- C. *People have safe and reliable transportation choices that enhance their quality of life.*
- 1) As a station community at the north end of a corridor, the area can leverage current transit and active transportation options (bus and light rail, the Trolley Trail) and support expansion.
  - 2) Improved local street, trail and commercial access safety supported by new design standards.
  - 3) Support safe, comfortable accommodations and prioritize multi-modal travel.
- D. *The region is a leader in minimizing contributions to global warming.*
- 1) Reduce reliance on motorized vehicles by expanding infrastructure, promoting optional modes.
  - 2) Support compact, green development with less intensive infrastructure and renewable resources.
  - 3) Support the local and regional economy to reduce transportation costs.
- E. *Current and future generations enjoy clean air, clean water and healthy ecosystems.*
- 1) Use existing watershed and habitat as focal points to increase care for the environment.
  - 2) Reduce pollutants by using ecosystem services for stormwater treatment, infiltration and reuse.
  - 3) Promote mixed-income and market-rate housing near transit and active transportation to support safe and convenient access, and reduce pollution associated with motor vehicles.
  - 4) Encourage businesses to close resource loops; use local resource flows to eliminate waste.
- F. *The benefits and burdens of growth and change are distributed equitably.*
- 1) Encourage redevelopment of underutilized commercial land to minimize displacement and other negative impacts in existing residential neighborhoods.
  - 2) Design policies to ensure retention of population diversity and address the needs of disadvantaged communities by providing living-wage jobs, affordable housing, etc.
  - 3) Higher property values will support public services and infrastructure.

### **Aligns with local goals/maximizes community assets**

#### **5. How will the project create opportunities to accommodate your jurisdiction's expected population and employment growth? (Limit your response to the bottom half of page 4.)**

This project will use many methods to promote uses that help accommodate the population and employment growth that is expected in urban unincorporated Clackamas County, including the following:

- A. Create design and development standards to enable opportunities to repurpose the underdeveloped, underutilized commercial corridor, which has excellent transit service and great potential for increased mixed-use residential and employment use.
- B. Optimize parking requirements by leveraging existing transit infrastructure, to ensure properties can use land for employment, housing and habitat.
- C. Facilitate outreach and research to identify market expectations and opportunities, and enable partnerships with developers, investors, property owners and local businesses to optimize investments.
- D. Explore opportunities to expand housing choices and employment along the corridor while ensuring long-term affordability.
- E. Use the project's development and design standards as a template for other locations along the corridor, to provide further opportunities to accommodate population and employment growth.

## Metro Contract 935012-Exhibit A County's Grant Request

### **6. Describe why you propose to take on this particular project at this time. How does the project relate to previous actions, goals, policies or strategies already identified or implemented by your jurisdiction or other project partners? (Limit your response to top half of page 5.)**

This project is needed now to capture momentum created by past and current projects, as well as regional development dynamics. In September 2015, light rail came to Park Avenue. By now the community has experienced the enhanced regional access and impact of a light rail station, and can better appreciate the value of moving forward to guide development and growth. Data from past projects that studied area development opportunities—including the Park Avenue Station Area Plan and McLoughlin Area Plan (MAP) Phases I and II – can inform this project.

This project will build upon the success of past projects – the Metro Nature in Neighborhoods grant for the Park Avenue Station and the regionally-significant Trolley Trail. This project is also intended to help the County accomplish the five priorities in its *Performance Clackamas* strategic plan: 1) Build public trust through good government, 2) Grow a vibrant economy, 3) Build a strong infrastructure, 4) Ensure safe, healthy and secure communities and 5) Honor, utilize, promote and invest in our natural resources.

There are four active Metro-funded projects related to the McLoughlin corridor: 1) North Milwaukie Industrial Area -- a framework plan and implementation strategy to guide future redevelopment; 2) Gladstone Downtown Revitalization Plan -- a more cohesive main street that re-establishes the corridor as the city center; 3) Willamette Falls Legacy Project -- reconnect people to the Falls; and 4) the Metro Coalition McLoughlin Corridor Brownfield Project -- to assess brownfield sites to lay the foundation for remediation and redevelopment along McLoughlin Boulevard.

Finally, the McLoughlin Corridor is the gateway to Clackamas County. Now is the time to take advantage of the accessibility offered by light rail to provide jobs and housing in this area. The county has a competitive market and can offer real estate opportunities at affordable rates not available in Portland. Having development-ready lands along McLoughlin is an advantage this project can leverage.

### **7. How would the project leverage aspects of the existing community fabric such as key development sites or urban form? How would it complement existing assets, facilities, or amenities such as historic districts, employment centers, natural features, parks or transit? (Limit your response to bottom half of page 5.)**

The project is planned to complement the commercial and residential areas with development and design standards that promote community goals, reinforce community identity and create a gateway to Oak Lodge and the greater McLoughlin area.

With significant light rail investment at Park Avenue, new development and design standards will be crafted to spur development of housing, employment, community services, retail and other uses. The adjacent Trolley Trail connection to regional active transportation infrastructure -- including along SE 17<sup>th</sup> Avenue and the Springwater Corridor – and the projected benefits of applying a tested template to nodes along the historic McLoughlin/99E corridor will further leverage many area assets.

These community assets also set a standard for abundant habitat and connected, natural open space to serve as an example for the creation and implementation of future development and design standards. They are models of success for integrating ecosystem services, educational elements and artistic identity that reflect community values.

Protecting surrounding neighborhoods from negative impacts of increased density while providing enhanced access to services, local business and other features will leverage the significant assets of the neighborhoods and retirement communities surrounding the corridor. Encouraging and enhancing habitat restoration, green infrastructure and opportunities to access nature and open space will support the natural environment.

Metro Contract 935012-Exhibit A  
County's Grant Request

**Team roles and capacity**

8. Complete the table to clearly describe the roles and responsibilities of the applicant and each of the key project partners to accomplish the goals of the project. Also include consultant expertise needed. (Add or adjust rows as needed but please limit table to page 6.)

<b>Jurisdiction or partner (include lead staff names)</b>	<b>Project role and responsibilities</b>
Clackamas County – Karen Buehrig, Lorraine Gonzales	Grant recipient and administrator; governing body of area in question; involved with planning, outreach, grant development and writing, development consulting
McLoughlin Area Plan Implementation Team (MAP- IT) – Terry John Gibson	Coordination, outreach, grant support, grant development and writing, communications, research, evaluation
<b>Community Organizations (not official partners, will play a key role in project development, implementation and evaluation)</b>	
<b>Community Organization</b>	<b>Role</b>
Clackamas Community Planning Organization (CPO)	Outreach, communications, evaluation, neighborhood assessment
Jennings Lodge CPO	Outreach, communications, evaluation, neighborhood assessment
McLoughlin Area Business Alliance (MABA)	Outreach and consulting, identifying hypothetical and/or sample sites and testing draft standards; evaluation
Oak Grove Community Council (CPO)	Outreach, communications, evaluation, neighborhood assessment
Oak Lodge Legacy	Grant development and writing, outreach, research, evaluation
Urban Green	Grant development, outreach, research

<b>Consultant team</b>	<b>Expertise</b>
Facilitator/Project manager	Group facilitation, management, collaboration, leadership, evaluation
Outreach coordinator (with local representation)	Community engagement, facilitation, leadership
Research	Land use, community development, zoning, market economics, etc.
Design specialist (with local representation)	Community development, land use, commercial development, modeling, metrics
Writer of design and development standards	Land use, zoning, development, design, writing, collaboration

## Metro Contract 935012-Exhibit A County's Grant Request

### **9. Describe the skills, experience and availability of the lead staff person who will manage all aspects of the grant project and oversee the project team's collaboration and consultant work. (Limit your response to top half of page 7.)**

Clackamas County staff Karen Buehrig and Lorraine Gonzales will be the team that manages all aspects of the grant project and oversees the project management team's collaboration and consultant work.

Karen Buehrig, Clackamas County Transportation Planning Supervisor, has more than 20 years of experience in the county with both land use and transportation planning projects. She has directly managed or participated as the managing supervisor for the update to the county's Transportation System Plan, TGM-funded projects that completed pedestrian and bicycle plans for the Clackamas Regional Center and the Villages at Mt. Hood, the CET-funded Clackamas Connections and several other projects. Karen will be the managing supervisor.

Lorraine Gonzales has more than 20 years of land use and project manager experience. She was key staff on many projects, including the McLoughlin Corridor Land Use and Transportation Study, Sunnyside Road Master Plan, Green Corridors, Sunrise Corridor Project, I-205 to Rock Creek Junction, and the Fuller Road Station Area and Park Avenue Station Area projects. She is familiar with project coordination and work program development with local, regional and state agencies, and has been on many long-range planning technical advisory teams for jurisdictions and agencies in Clackamas County and Metro. Under Karen's supervision, Lorraine will be responsible for overall grant reporting and management, as well as overseeing consultant work and project team collaboration.

### **Likelihood of implementation**

### **10. What governing bodies or private parties will have to act to ultimately implement the project, and what is the extent of their authority to make policy or commit investments? Describe the roles the key project partners will have to play over time in order to fully and successfully implement the project in order to realize the envisioned development benefits in your community. (Limit your response to bottom half of page 7.)**

The project focus is the implementation of development and design standards in alignment with a community-supported vision for economically vibrant, inclusive, equitable and sustainable development that complements opportunities created by light rail service to Park Avenue. The vision carried forward in the standards will reflect the McLoughlin Area Plan, Phases I and II, adopted by the community to enhance and revitalize the McLoughlin Boulevard area, as well as *The Five Components of the McLoughlin Area Plan*. These documents were funded and recognized by Clackamas County.

A critical step will be adoption of the proposed standards by the Board of Commissioners. That is made more likely by the board-adopted strategic goals delineated in *Performance Clackamas*, detailed in the answer to question #6. Once adopted, the standards, designed to streamline the development process, will be implemented as individual property and business owners develop their property.

A comprehensive and inclusive community engagement process, like the one planned, will be essential to successful adoption and implementation of the standards by the county. By testing draft standards on actual and/or hypothetical sites, the impact of the standards on properties are intended to be clear and understandable. In addition, the implementation framework plan will include a tool box, handbook and/or other materials to plainly outline the application of the standards.

Another aspect of the project will be the creation of metrics to evaluate the effectiveness of meeting community goals as McLoughlin Boulevard develops. If application of the standards does not result in the expected outcomes, they can be refined to better meet the needs of the developers and the community.

## Metro Contract 935012-Exhibit A County's Grant Request

### **11. Identify and describe the potential opportunities and threats that could affect the successful implementation of this project. (Limit your response to top half of page 8.)**

Extensive community engagement is planned to involve business, development and resident perspectives. Innovative efforts to hear from and address voices that are typically underrepresented will be applied. Addressing these various perspectives is intended to help ensure that the development and design standards, and implementation strategies will address opportunities and threats.

#### **Opportunities:**

- Strong market demand for diverse and affordable housing, and offices, small makerspaces and employment land, convenient to transit, trails, open space, services, employees and amenities.
- New standards to incentivize and attract equitable, sustainable growth, housing, natural features and living-wage jobs aligned with regional goals and demands
- Convenient access to central city and the metro region
- Create development and design standards, and implementation strategies that address current constraints of the Zoning and Development Ordinance, and help streamline and facilitate development.
- Address foreseeable impacts of development on neighborhood livability.

#### **Threats:**

- Specific or more detailed development and design standards could be seen as a threat by some developers, investors and property owners
- Competing market demand by current uses including auto dealerships and storage facilities
- Potential lack of economic alignment for developers on McLoughlin despite new standards
- Limited funds for strategic public infrastructure and amenities to spur development
- Lack of public participation due to factors beyond the control of the project
- Concerns about possible negative impacts due to issues related to increased development
- Inability to consolidate existing parcels for substantial development

### **Public involvement**

#### **12. What community members or stakeholders will be most affected by the implementation of the project's development outcomes? (Limit your response to bottom half of page 8.)**

- Employers and business startups seeking greater access, exposure, culture and employees
- Businesses and property owners may welcome new standards that support potential for growth and higher level uses that will bring increased property value and rental income potential.
- Residents displaced by rising housing prices throughout the metro region looking for an affordable place to live may find an affordable option in the project area.
- Residents surrounding corridor development may benefit from improved standards that preserve character and enhance livability while protecting them from displacement.
- People in marginalized communities may gain through increased access to the benefits of development.
- Business owners and developers along McLoughlin Boulevard and adjacent to the light rail station that would benefit from a streamlined and flexible development process.

## Metro Contract 935012-Exhibit A County's Grant Request

**13. Discuss how the public (including neighbors to the project, businesses, property owners and other key stakeholders) and historically marginalized communities (including low-income and minority populations) will be involved in the project. Please be specific about the practices or methods you intend to use. (Limit your response to top half of page 9.)**

The community has an economically diverse population, and is a refuge of relative affordability and livability with easy access to regional assets and benefits. This community will continue to draw marginalized people from other communities as it strives to become an even more livable, diverse place that bolsters health and sustainability. The project will include the study and implementation of strategies with the best potential to maintain mixed-income diversity and affordable access, and outreach to all communities for input and response. While proven data in this area is scarce, many strategies could be implemented in various combinations to achieve this goal.

A thoughtful, inclusive, innovative community engagement process will be crafted to ensure that parties that traditionally do not engage or have the capacity or awareness to participate, are heard and involved, as they choose to be, and strive to address all age, gender, culture and economic levels. The process will include focus groups of property owners, business owners, developers and investors to provide perspective and help define the tools necessary to stimulate economic growth and development of housing options in the project area.

McLoughlin area residents have joined together to enact change in their community for many years, and have played a pivotal role in development of this 2040 Metro Community Planning Development Grant application submittal. The community worked together to create the vision; now they will work together to implement it. Working with the consultant team, the community will develop a comprehensive, inclusive community engagement process to allow the vision to become reality.

**14. Describe how public input will be used to strengthen the project outcomes and increase likelihood of implementation. (Limit your response to bottom half of page 9.)**

As described above, thoughtful, inclusive and innovative community engagement methods guided by professionals will be used with the intent of providing two-way communication opportunities and a community-centric feedback cycle for and with all who wish to participate. Stakeholders will also be encouraged to be involved in development of the community engagement process, including recommending how to involve all stakeholders in creating, responding to and implementing development and design standards to meet and build upon the community's vision, values and guiding principles as described in MAP 1, MAP 2 and *The Five Components of the McLoughlin Area Plan*.

While the project will seek to involve as many members of the public and stakeholders as possible, there is also an intent to focus on quality and depth of public engagement. For example, carefully-selected focus groups of stakeholders who could be impacted by the new standards will be used to contribute ideas and suggestions on creation of the development and design standards, and the implementation strategies. Focus group input will also be one source of insights on current development constraints, and will be used to help refine existing language or develop new language to promote diverse business, housing and mixed-use options along the McLoughlin Corridor.

Input from area residents will be used to help define neighborhood opportunities and constraints as a result of new development, and contribute toward addressing housing needs, neighborhood connections, and amenities they wish to have along the McLoughlin Corridor to serve their neighborhoods.

Public and technical advisory groups will be asked to review and provide input on the process and deliverables from each phase to ensure the final product embodies the project's goals, and reflects community priorities.



Metro Contract 935012-Exhibit A  
County's Grant Request

**Jurisdiction track record**

**15. Describe any similar planning and development projects (CET/CPDG or other) that have been implemented in your jurisdiction in the last 5 years and how that experience will be applied to this project. How successful have these projects been in delivering the proposed outcomes? (Limit your response to top half of page 10.)**

*Nature in Neighborhoods Grant* – This Park Avenue project will build on work completed five years ago with funding received by the community, partnering with TriMet, from a 2010 Metro Nature in Neighborhoods grant. The grant funded a series of community meetings and design charrettes to visualize and design the Park Avenue station complex, resulting in the creation of a community forest with multiple ecosystems surrounding the station complex, in a previously degraded area with mostly hardscape and industrial buildings. The purpose of the NIN grant was to help the Park Avenue light rail, bike and auto transportation hub serve as the catalyst for the regeneration of McLoughlin Boulevard.

*McLoughlin Area Plan* -- Since 2008 the community has worked through and completed extensive planning efforts that produced the McLoughlin Area Plan (MAP) Phase I and II with the community's vision, values and guiding principles, and established a county-recognized committee – the McLoughlin Area Plan Implementation Team (MAP-IT)—in 2012 to help the vision, values and guiding principles become a reality. This project is a significant step forward in that effort.

**16. What project management lessons learned or best practices will be applied to this project? (Limit your response to bottom half of page 10.)**

- Robust commitment toward public engagement, and a commitment to honestly and transparently share and respond to that engagement, is crucial throughout the life of the project. Public outreach and use of innovative methods will represent a global voice of both those that typically engage in the public process and those that are typically unrepresented.
- Work with the public and technical groups will contribute to a more inclusive process and address up-front constraints encountered by developers, stakeholders and technical groups.
- It is essential to work closely with Metro on the front end in development of the scope of work in order to be sure to meet and exceed Metro's expectations.
- There is great value to the project of more consistent engagement from Metro with the project team throughout the life of the project.
- Identify a single point of contact for grant management and responsibility of deliverables and be clear that all requests, deliverables, etc. to Metro will go through that point of contact.

## Metro Contract 935012-Exhibit A County's Grant Request

**17. If implementation of any prior CET/CPDG grant projects has not been successfully completed, please describe why. If your organization has never received a CET or CPDG grant, please state “not applicable.” (Limit your response to top half of page 11.)**

The county has received past CET and CPDG grants, and they have been successfully completed.

### **Replicable best practices**

**18. Consideration will be given to applications that demonstrate best practices that can be easily replicated elsewhere. Discuss how lessons learned from the project could be applied to other projects in your community or in other parts of the region. (Limit your response to bottom half of page 11.)**

The public engagement processes, and creation and implementation of development and design standards will provide a flexible template that can be applied individually to previously-identified and possible new nodes along the McLoughlin Corridor. Such future phases are likely to include more in-depth neighborhood livability and economic diversity assessments to further enhance the community's understanding of what actions will be most effective to preserve and maintain a robust and high-quality stock of affordable housing options that address the full spectrum of needs across income levels, household sizes and stages of life. Those studies will also include exploration of policies to protect and enhance the livable character of existing single-family neighborhoods.

In addition, this project could serve as a model for what is indeed a regional, statewide and national problem, e.g., the challenge of post-war, auto-dominated suburban commercial strips. This project has the potential of demonstrating how communities and jurisdictions can work together to respond to this challenge.

Metro Contract 935012-Exhibit A  
County's Grant Request

7/5/2017

2040 Planning and Development Grants



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Metro  
Planning and Development  
**2040 Planning and Development Grants**

**Clackamas County - DTD**  
Park Avenue Development and Design Standards

**Requested Amount**

\$ 180,000.00

**Project ranking: Rank this application by stating "This application is ranked \_ of \_ application(s) submitted by this jurisdiction."**

This application is ranked 2 of 2 applications submitted by Clackamas County

**Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development, either by serving historically marginalized populations or by providing equitable housing.**

- This project has a primary emphasis on equitable development
- Not applicable

**Provide a short summary describing the project, anticipated work to be completed and desired outcomes.**

The Park Avenue Development and Design Standards Project (the project) will employ an inclusive and extensive community engagement process to create development and design standards for the Park Avenue Station area. These standards will be crafted to implement the Community Values and Guiding Principles (including those related to economic vitality, inclusiveness, sustainability and design) of the McLoughlin Area Plan, developed and approved by the community from 2008-12, and The Five Components of the McLoughlin Area Plan, approved by the Clackamas County Board of Commissioners in 2015. The project will also include an assessment of neighborhood livability and economic diversity in the residential areas surrounding the Park Avenue Station. The intent is for the final outcomes of the project to embody the essence of equitable development and to be applicable as a flexible template for other areas along McLoughlin, as well as other auto-dominated, suburban commercial areas in the region.

**What is the location and/or program reach of the project? Provide a brief description.**

The project will focus on the area from the Park Ave Light Rail Station on the north (the intersection of Park Ave and McLoughlin Blvd) to Courtney Ave to the south. It will include the commercial areas directly adjacent to McLoughlin in this area, as well as the surrounding neighborhoods within a 1/2 mile buffer. The Project Area map in the Uploads section displays this area. In addition, we have included a map of the entire McLoughlin Corridor that shows the area where outcomes of this grant could be replicated at specific locations in the future.

**Prior CET/CPDG/Equitable Housing Grant Awards**

	<b>Project name / brief description of the project purpose (1-3 sentences)</b>	<b>Date initiated/completed</b>
1.	2013: Grant Cycle 3 – Strategically Significant Employment Lands \$221,000	Initiated in 2013 / Completed June 2014
2.	2013: Grant Cycle 3 – Performance Measures and Mixed Use Area \$160,000	Initiated 4/2014 / Completed 12/2016
3.	2015: Grant Cycle 4 - Stafford Area Preliminary Infrastructure Feasibility Assessment	IGA yet to be developed
4.		
5.		
6.		
7.		
8.		
9.		
10.		
	<b>Total</b>	

Metro Contract 935012-Exhibit A  
County's Grant Request

<b>Project Budget Summary</b>				
Personnel Costs	Financial match	In kind match	2040 Grant Funds	Total
Consultants			\$180,000	\$180,000
** It is important for the consultant team to include local representatives in their outreach and design teams.				
County Staff		\$45,000		\$45,000
Supervisor @ \$96.77 / hr (no overhead)				
Senior Planner @ \$80.19 / hr (no overhead)				
Economic Development Services \$81.30/ hr (no overhead)				
Partner Staff				
Other, add rows as needed				
<b>Total for planning services</b>				<b>\$225,000</b>
OTHER PROJECT COSTS				
** The funding for the consultant team should include funds for strategic guest speakers and educational resources to empower citizen involvement				
Direct costs, please list in narrative				
** The Consulting team may incur direct costs depending on the Public Engagement Plan. These cost should be included in the Consultant Planning Services budget				
Overhead/indirect costs				
** The in-kind match hourly rate provided by the County includes indirect costs for fringe benefits				
<b>Total for other costs</b>				
<b>TOTAL PROJECT COSTS</b>				<b>\$225,000</b>

# Metro Contract 935012-Exhibit A County's Grant Request

Milestones and Budget Narrative							
Milestone/ Project Element	Deliverable	MILESTONE/PROJECT ELEMENT (Phase, element, deliverable, etc.)	Grant applicant personnel costs	Partner(s) personnel costs	Consultant fees	Other project costs	TOTAL
<b>#1</b>		<b>#1: Project Management</b>	\$10,000		\$10,000		\$20,000.00
	1.1	<b>Deliverable 1.1:</b> IGA between Clackamas County and Metro Select Consultant team Refine detailed Scope of Work (SOW) and budget with consultant team Define quarterly grant reporting schedule					
	1.2	<b>Deliverable 1.2:</b> Finalize scope of work (SOW), schedule, and budget Project management team meeting throughout project					
	1.3	<b>Deliverable 1.3:</b> Grant reporting throughout the project					
<b>#2</b>		<b>#2: Community Engagement</b>	\$5,000		\$30,000		\$35,000
	2.1	<b>Deliverable 2.1:</b> Inclusive, comprehensive public engagement plan involving property owners, business owners, community partners, developers, investors, residents and others.					
	2.2	<b>Deliverable 2.2:</b> Creation of technical, public, focus and stakeholder advisory group members Establish a meeting schedule for the Project Management Team (PMT) and meeting with PMT and community leaders, interested parties, business owners, landowners, investment parties, and technical, focus and stakeholder groups. Set-up website and online tools for public engagement Compile names for mailing lists; stakeholders (developers/property owners/investors/renters/business owners)					
	2.3	<b>Deliverable 2.3:</b> Production of an inclusive and comprehensive community engagement report with metrics, visual communications and graphic materials (publications,					
<b>#3</b>		<b>#3: Existing Conditions, Inventory and Data Compilation</b>	\$10,000		\$30,000		\$40,000
		Assess and analyze existing plans, land use zone and policies Complete a land inventory, including asset mapping - identifying what is missing Census data analysis - population logistics for housing and income data Market analysis - retail, housing, built and underdeveloped properties Constraints and opportunities analysis (includes infrastructure costs) Evaluate potential impacts of development to surrounding areas					
	3.1	<b>Deliverable 3.1:</b> Memo 1 - Summary reports of existing conditions and market analysis, including usable graphics that include existing plans, existing regulatory framework, land inventory, demographics, the natural and built environment and other area projects.					
	3.2	<b>Deliverable 3.2 :</b> Memo 2 - Neighborhood Livability and economic diversity assessment that considers potential impacts to surrounding neighborhoods due to population growth, traffic, rising property values and redevelopment; work to minimize negative impacts and benefit livability.					
	3.3	<b>Deliverable 3.3 :</b> Meeting facilitation and summaries implementing public engagement plan					
<b>#4</b>		<b>#4: Draft and Refine Develop and Design Standards</b>	\$15,000		\$95,000		\$110,000
		Prepare and conduct public and technical, stakeholders, and focus advisory group meetings. Meeting summaries					
	4.1	<b>Deliverable 4.1:</b> Memo 3 - Review of best practices in mixed-use zones, including projects, tools and strategies that maximize long-term affordability, sustainability, productive local economy, retain living-wage work, improve community health and collaboration					
	4.2	<b>Deliverable 4.2 :</b> Draft development and design standards					
	4.3	<b>Deliverable 4.3:</b> Memo 4 - Summary of draft standards test on actual and/or hypothetical sites, with illustrated model outcomes, effectiveness evaluation, developer and community buy-in Identify and use metrics to ensure implementation of community goals Cross-reference proposed implementation strategies with adopted goals and principles of Create a framework plan to measure performance and refine zoning to respond to market economics.					
	4.4	<b>Deliverable 4.4:</b> Meeting facilitation and summaries implementing public engagement plan					
	4.5	<b>Deliverable 4.5:</b> Refined development and design standards					
<b>#5</b>		<b>#5: Implementation Strategies</b>	\$5,000		\$15,000		\$20,000
	5.1	<b>Deliverable 5.1 :</b> Memo 5: Implementation framework plan, including metrics to ensure implementation of community goals, response to market economics, tool box on how to use standards and a template that can be used in other locations along the McLoughlin Corridor.					
	5.2	<b>Deliverable 5.2:</b> Community engagement plan with a community-centric feedback cycle.					
	5.3	<b>Deliverable 5.3:</b> Adoption-ready materials, including ZDO amendments that implement the development and design standards, for Planning Commission and Board of County Commissioners public hearings and action.					
		<b>TOTAL COSTS</b>	<b>\$45,000</b>		<b>\$180,000</b>		<b>\$225,000</b>
		Overhead/Indirect					
		<b>GRAND TOTAL</b>	<b>\$45,000</b>		<b>\$180,000</b>		<b>\$225,000</b>

Metro Contract 935012-Exhibit A  
County's Grant Request

Breakdown of applicant and partner(s) matching contributions					
<b>** Clackamas County is the only partner providing match on this project, therefore this table is not needed .</b>					
Applicant jurisdiction or partner organization	In kind contributions: personnel costs	Financial Contributions personnel costs	In kind contributions: other costs	Financial Contributions other costs	TOTAL
Clackamas County	45,000				45,000
Not Applicable (N/A)	Not Applicable (N/A)	Not Applicable (N/A)	Not Applicable (N/A)	Not Applicable (N/A)	Not Applicable (N/A)
<b>TOTAL MATCH COMMITTED</b>					45000

Metro Contract 935012-Exhibit A  
County's Grant Request



Aerial Map



Hardscape Divider



Natural Assets

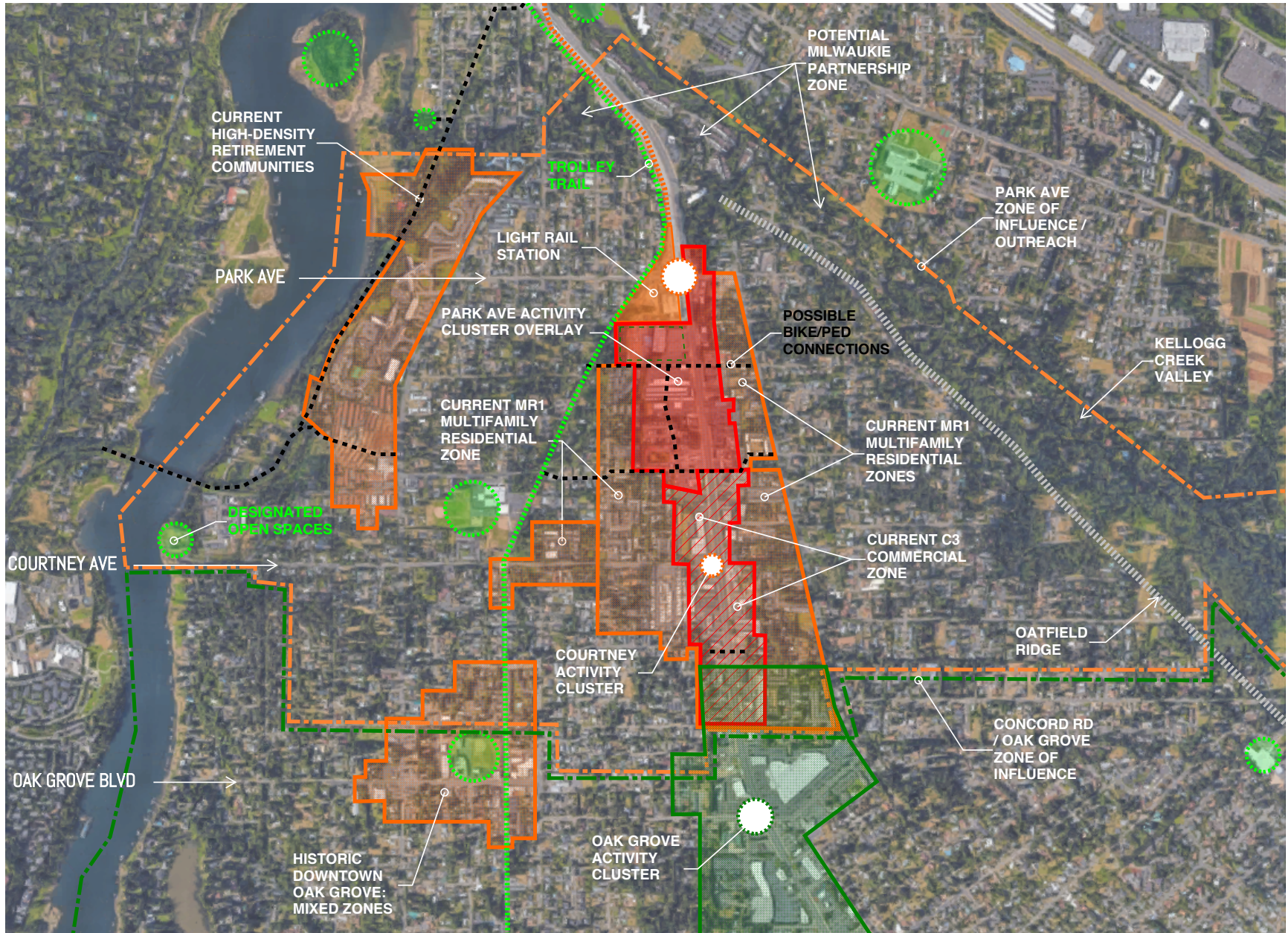


Ecosystem Connectivity



Foundation: Community Vision

Metro Contract 935012-Exhibit A  
County's Grant Request



Park Avenue: Study Area Map

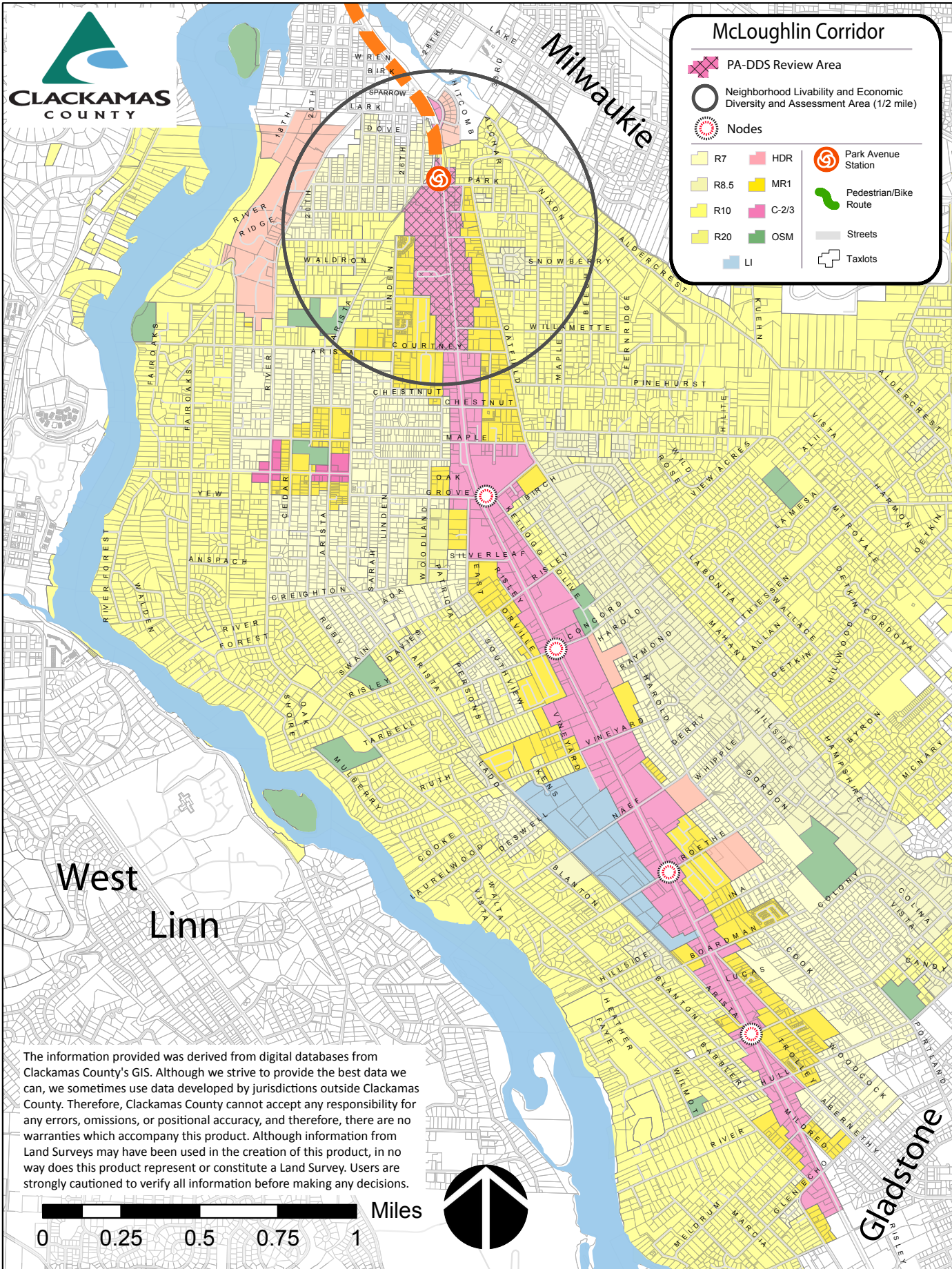


# Metro Contract 935012-Exhibit A County's Grant Request



### McLoughlin Corridor

- PA-DDS Review Area
- Neighborhood Livability and Economic Diversity and Assessment Area (1/2 mile)
- Nodes
  - R7
  - R8.5
  - R10
  - R20
  - LI
  - HDR
  - MR1
  - C-2/3
  - OSM
- Park Avenue Station
- Pedestrian/Bike Route
- Streets
- Taxlots



The information provided was derived from digital databases from Clackamas County's GIS. Although we strive to provide the best data we can, we sometimes use data developed by jurisdictions outside Clackamas County. Therefore, Clackamas County cannot accept any responsibility for any errors, omissions, or positional accuracy, and therefore, there are no warranties which accompany this product. Although information from Land Surveys may have been used in the creation of this product, in no way does this product represent or constitute a Land Survey. Users are strongly cautioned to verify all information before making any decisions.



Gladstone

Metro Contract 935012-Exhibit A  
 County's Grant Request



Park Avenue Development and Design  
 Standards (PA-DDS) Project Area

**Park Avenue Station Area**

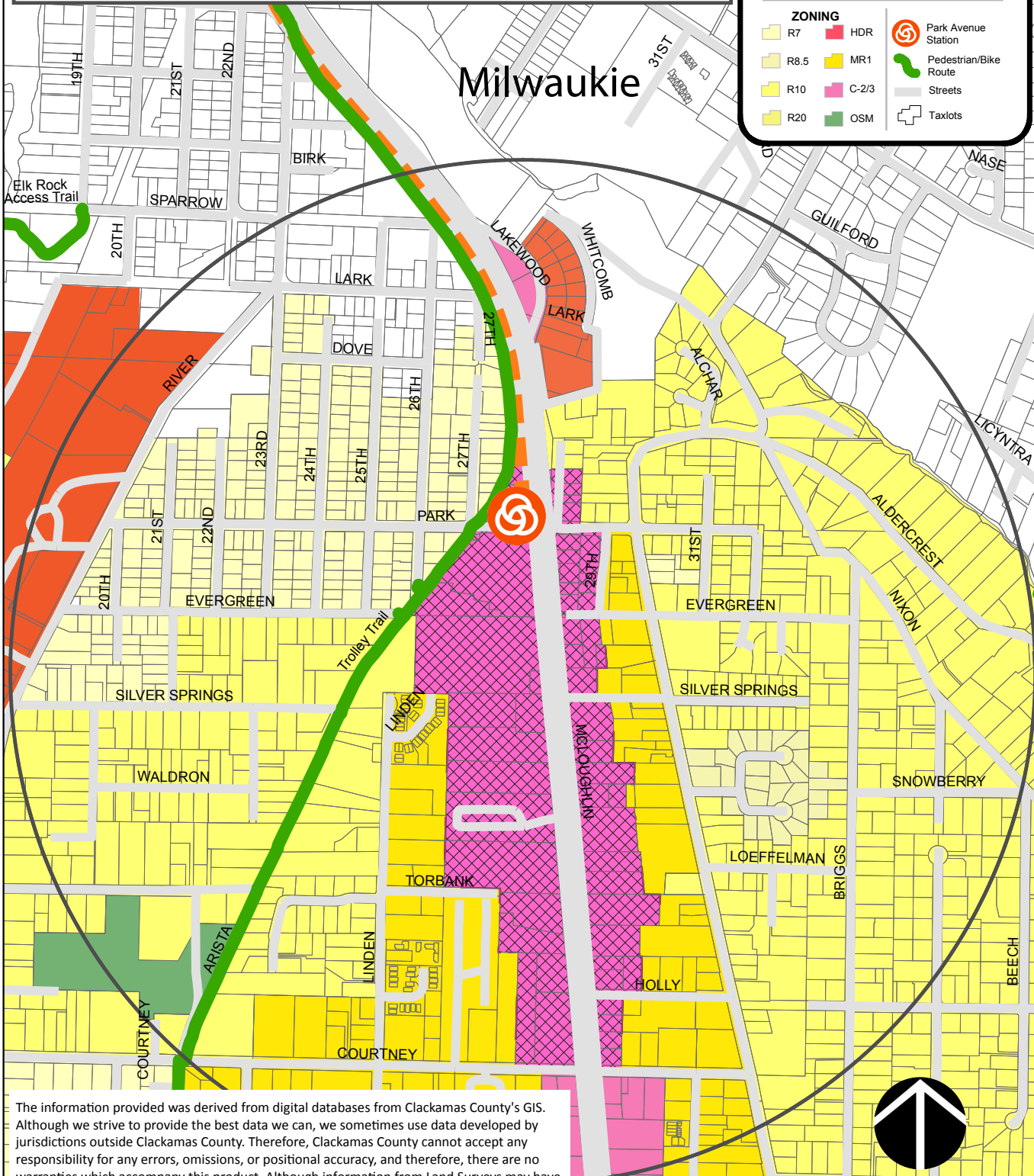
- PA-DDS Review Area
- Neighborhood Livability and Economic Diversity and Assessment Area (1/2 mile)

**ZONING**

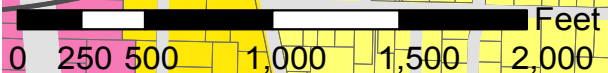
R7	HDR
R8.5	MR1
R10	C-2/3
R20	OSM

- Park Avenue Station
- Pedestrian/Bike Route
- Streets
- Taxlots

Milwaukie



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Metro Contract 935012-Exhibit A  
County's Grant Request



Economic Development Commission  
Managed by Business & Economic Development

June 6, 2017

Metro CPDG Grant Selection Committee

Re: Support of Clackamas County Grant Application for the Park Avenue Development and Design Standards

Dear Selection Committee;

Please accept this letter of support of the grant application from Clackamas County for the Park Avenue Development and Design Standards. This project is an inclusive public engagement process to create development and design standards for the Park Avenue Station area. Implementing the McLoughlin Area Plan, it includes an assessment of neighborhood livability and economic vitality.

The Clackamas County Economic Development Commission (EDC) is an advisory committee to the Board of County Commissioners. The EDC began studying the McLoughlin Corridor in 2011 as requested by the Board of County Commissioners to provide feedback on prioritizing areas for redevelopment opportunities throughout the County. At that time, the EDC recommended that the Corridor be broken into “nodes” to allow study of redevelopment in catalytic areas. The EDC has continued to study this area and in early 2017 invited the MAP-IT representatives to present an update of activities which included their desire to apply for the Metro grant.

As the overall outcomes of this project would include community and business-supported development and design standards to implement goals, this project is in line with the recommendations from the EDC study.

The EDC supports this effort and asks for your approval of this grant application.

Sincerely,

A handwritten signature in black ink, appearing to read "Peter Lund".

Peter Lund, Chair of the Clackamas County Economic Development Commission and on behalf of the EDC Executive Committee

:

Metro Contract 935012-Exhibit A  
County's Grant Request



June 21, 2017

To Whom It May Concern,

The McLoughlin Area Business Alliance (MABA) CONVEYS ITS SUPPORT for funding the Park Avenue Development and Design Standards project (\$250,000).

As property owners and business operators on and/or near the McLoughlin Boulevard corridor, we (MABA) are committed to driving economic growth while simultaneously insuring public safety, both vehicular and pedestrian.

The Park Avenue Development and Design Standards project focuses on an inclusive public engagement process. Information sharing, constructive feedback and community support are all critical aspects in the success of this initial McLoughlin Boulevard "HUB" at Park Avenue. The Park Avenue Development and Design Standards outcomes may serve as a template for other locations along the corridor therefore engaging all existing and potential stakeholders is both imperative and prudent.

Funding the Park Avenue Development and Design Standards project will allow an opportunity for input from property owners, business operators, developers, investors and of course residents as well.

Please consider the McLoughlin Area Business Alliance's SUPPORT as you decide the future of the McLoughlin area corridor.

In Health,

MABA Management Team

Jennifer Harding, Co-chair MABA / Owner East Side Athletic Clubs

Punky Scott, Co-chair MABA / Owner The Bomber Restaurant

Sandra McLeod, Vice chair MABA / Owner Trident Realty

Metro Contract 935012-Exhibit A  
County's Grant Request



June 24, 2017

Dear Metro,

The Oak Grove Community Council is in full support of the **Park Ave Development and Design Standards Project** and honored to be part of the submittal to Metro for a Community Planning and Development Grant requested by Clackamas County and MAP-IT (McLoughlin Area Plan Implementation Team).

The awarding of this grant will further one of the main efforts of the Oak Grove and Jennings Lodge communities – to revitalize the economics and livability of the McLoughlin Corridor by increasing sorely needed local living-wage work and housing opportunities. The **Park Avenue Development and Design Standards Project** is key to repurposing the neglected, underdeveloped, underutilized commercial corridor that runs through the center of our community.

Focusing on the first community identified node at Park Ave, the development and design standards created through this project will serve as a template for other 'activity clusters' along the McLoughlin Corridor to accommodate population and employment growth, both profoundly needed in Clackamas County.

In an unprecedented collaboration, members of our community have written this grant with County staff to ensure its alignment with the Community Vision, Values, and Guiding Principles of the McLoughlin Area Plan. This successful, previous community engagement effort will be the foundation for the deeper, more focused process called for in this grant.

In summary, the Oak Grove Community Council is in full support of the grant application for the **Park Avenue Development and Design Standards Project**, which will help the Oak Grove and Jennings Lodge community become the next best place to live, work and thrive.

Sincerely,

A handwritten signature in black ink, appearing to read "Baldwin van der Bijl", is written over a light gray rectangular background.

Baldwin van der Bijl  
Chair  
Oak Grove Community Council

Metro Contract 935012-Exhibit A  
County's Grant Request



June 26, 2017

Metro CPDG Grant Selection Committee

Re: Support of Clackamas County Grant Application for the Park Avenue Development and Design Standards

Dear Selection Committee:

As Agency Architect for TriMet I've had the wonderful experience working with the good folks of *Urban Green* on the recently complete Orange Line transit project. As part of our scope for the Project, we conducted a development opportunities study for the area immediately south of the Park Avenue Station Park & Ride structure. Our interest in this area was to ensure our structure would complement future planning for redevelopment. It was evident to TriMet that there's strong interest and support for re-imagining what kind of development might occur that would leverage the substantial investment in multi-modal transportation.

The Park Avenue Development and Design Standards project would be a terrific way to engage all stakeholders in the McLoughlin Area Plan. By pursuing an inclusive public engagement process to find ways the Community Values and Guiding Principles of the Area Plan could become activated, it would help build civic capacity within the community. Outcomes of this process would be improved economic vitality, inclusiveness, sustainability and design.

It would be an essential principle of the planning process to engage with local businesses and neighbors to build community, improve accessibility, and sustainable resiliency. It would be a great way to see how existing assets and resources could be repurposed. It's apparent to many that there are significant underdeveloped, and underutilized facilities and assets along this historic commercial corridor.

It my great pleasure to support this application for grant funds to further the efforts to create the Park Avenue Development and Design Standards project.

Sincere regards,

A handwritten signature in black ink that reads "Robt. Hastings".

Robert Hastings FAIA

Agency Architect

TriMet

1800 SW First Avenue, Suite 300

Portland, OR 97201

Metro Contract 935012-Exhibit A  
County's Grant Request

June 28, 2017

To: Metro Grant Screening Committee  
Re: Park Avenue Development and Design Standards Project  
Applicant: Clackamas County and McLoughlin Area Plan Implementation Team  
Funds requested: \$180,000

Dear Screening Committee Members:

Thank you for this opportunity to confirm the unanimous support from the McLoughlin Area Plan Implementation Team (MAP-IT) for the Park Avenue Station Area Development and Design Standards grant application, submitted in partnership with Clackamas County.

The awarded grant funds will be used to hire consultants to manage the project, which is intended to facilitate inclusive public and stakeholder engagement to draft development and design standards for the Park Avenue Station Area that implement the Community Values and Guiding Principles of the McLoughlin Area Plan, including those related to economic vitality, inclusiveness, sustainability and design.

The project also includes an assessment of Neighborhood Livability and Economic Diversity in the neighborhoods surrounding the Park Avenue Station.

One of the goals of the community engagement process and resulting design and development standards is to provide a template that can be used for other nodes along the McLoughlin Corridor. The long-term intent is to repurpose the underdeveloped and underutilized commercial corridor and further provide opportunities to accommodate population and employment growth.

The project management team members are MAP-IT community and business volunteers that worked together very closely with County staff on the application. The application of the project resources for implementation of this public process would be an important first step to meaningful redevelopment of Highway 99E from Milwaukie to the Willamette Falls Legacy Project.

Sincerely,

*Terry John Gibson*

Terry John Gibson  
Chair, MAP-IT

## Park Avenue Station Area Development & Design Standards Project

### Phase I: Park Avenue Station Community Assessment SCOPE OF WORK FOR DIRECT APPOINTMENT

Draft: August 1, 2018

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#### Introduction

Clackamas County, Oregon, working with the McLoughlin Boulevard area residential and business community, is looking for consultants to create development and design standards for commercial zones within ½ mile of the Park Avenue/McLoughlin Boulevard intersection in unincorporated Clackamas County that will support the community's long-term vision for the Park Avenue Station area.

The project's area of focus is the unincorporated area of Clackamas County within one-half mile of the Park Avenue light-rail station at the intersection of Park Avenue and McLoughlin Boulevard (Appendix A, maps) in the northwest corner of Clackamas County, adjacent to Milwaukie, nine miles south of downtown Portland. However, one of the intended outcomes of the project is to provide guidance and/or a template for processes to use in updating design and development standards all along the McLoughlin Boulevard corridor in unincorporated Clackamas County.

The long-term goal is to create a vibrant, connected, sustainable and accessible community that meets diverse needs and provides long-term livability and prosperity for landowners, businesses, renters and visitors.

The new mixed use and commercial development and design standards are expected to have broad community support and be adopted into the county code by the Board of County Commissioners. In conjunction with creation of the code, a neighborhood analysis will be conducted to determine potential impacts incurred by development in the project area.

The project will begin with Phase I -- community assessment, and development of an extensive and inclusive public engagement process -- that will support the Phase II implementation of public engagement that supports the creation of multi-faceted development and design standards that reflect community values and interests. The project will seek to identify and encourage the participation of all voices of the community, from highly engaged residents to marginalized community members, and from business and landowners to the development community.

The Phase I consultant team is expected to conduct a thorough community assessment and to bring forth both innovative and proven public engagement tools that can be used in Phase II to gather and incorporate meaningful input from the broadest range of community representation. Ultimate success for both phases of the project will be measured by the extent and quality of community and stakeholder participation, and by community and stakeholder understanding and support of the proposed development and design standards. Building trust with the community will be a key factor in achieving the desired outcome.



## Metro Contract 935012 - Exhibit B Scope of Work

This project is being funded through Metro's 2040 Planning and Development Grant program. 2040 grants are awarded to cities and counties in the Portland region to help remove barriers to private investment in development, promote planning activity that makes land ready for development, and help to implement the Portland region's long term plan for livability, outlined in the 2040 Growth Concept.

### **Background**

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

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

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

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

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

The MAP adopted a vision framework and core values in 2010, with extensive input from the community, and later identified specific policies, projects and programs to implement that vision. It is imperative that all of MAP is addressed concurrently to provide a solid yet malleable framework for future evolution of core development, design and planning standards.

## Metro Contract 935012 - Exhibit B Scope of Work

The intent of this project is not to create a new community vision, but to inform, educate and build on the vision created by MAP and shared with the community in 2010.

The community's renewed energy and vigor are focused to ensure this project will provide democratic tools to ensure cooperative planning is employed in the creation of development and design standards that will bring their vision and values to reality.

In 2010-11, the county developed the **Park Avenue Neighborhood and Station Area Planning Project**, sponsored by a \$250,000 grant from the Oregon Transportation & Growth Management Program. The intent of this project was to enhance the area for transit-oriented development to capitalize on opportunities available to the community with the new Park Avenue light rail station. The project looked at transit-oriented development in the station area and developed an overall concept for transitioning the McLoughlin Boulevard commercial corridor and the area within ½ mile of the Park Avenue Station to a more pedestrian-friendly and connected commercial district. However, the project lacked a robust public involvement component and the plan was ultimately not adopted by the Board of County Commissioners in 2012 largely due to significant opposition voiced by some community members.

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### **Phase I Overview**

The primary objective of the community assessment is to conduct thorough outreach to better understand the demographics and cultural/economic diversity of the area, identify existing community-based organizations and stakeholder groups, assess overall community awareness, opinions and support of the MAP vision, and assess broader aspects of future development trends and neighborhood change. In addition, the community assessment and proposed public engagement process will provide a broad foundation for community-building along with the inclusive and extensive public engagement process to be used during Phase II -- the technical phase -- of the Park Avenue Development and Design Standards project.

The proposed goals and activities of the community assessment include:

- Identify the diverse range of community members - study area residents and property owners, businesses, development interests, and nearby neighbors - who should be engaged in shaping the future of the area.
- Assess the current level of understanding of the MAP vision, as it relates to the corridor study area, and the amount of support for that vision.
- Build certainty that all community members will have access to the public process and equal opportunity to effectively share their views with decision-makers and elected officials during the project.
- Identify potential partnerships and programs that could support neighborhood stability and provide opportunity and security for residents despite growth and change.
- Develop an engagement strategy to support the Phase II technical work developing revised commercial development and design codes in the area such that community members will be informed by a full understanding of potential impacts of the revised codes to likely development and business activity, neighborhood livability, economic diversity, community health, natural environment, etc.
- Share the information learned through the Community Assessment with elected officials and provide them with an opportunity to guide the next steps for the project,

Metro Contract 935012 - Exhibit B  
Scope of Work

including a process that will lead to the new design and development standards to be supported by the Planning Commission and adopted by the Board of Commissioners.

The **major deliverables for Phase I** include:

- A summary of findings from Phase I
- A public engagement strategy (including composition of any proposed project committees) for Phase II
- Proposed revisions to scope of work for Request for Proposal (RFP) for Phase II.

At the conclusion of Phase I, the project team will make a presentation to the Board of County Commissioners to share and seek acceptance of Phase I findings and deliverables, and to obtain direction for and approval to proceed with Phase II.

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### **Task 1: Project Management**

The consultant team will work with a team of community members and County and Metro staff. County and Metro public involvement and planning staff will be involved to offer technical assistance to the project team and ensure that project work is aligned with Metro grant funding and objectives. The consultant team will designate a Consultant Project Manager to work with the project team to ensure successful completion of all portions of Phase I. At the outset, the Consultant Project Manager will work with the project team to establish a mutually agreeable schedule for project management check-ins and community meetings. This will help to ensure a smoothly-managed project that delivers clear and expected results within budget and timeframe, and that meets requirements for Metro grant funding.

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

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

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

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

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### **Task 2: Research and document community demographics and organization**

The outcome of Task 2 is to identify the diverse range of community members who will be most impacted by changes to the development code and new mixed use and commercial development in the corridor study area and should be engaged in shaping the future of their community, including an assessment of community organizations and interest groups and patterns of participation. The expected activities involved in this task include:

- Research and document demographics and property interests of the study area and nearby neighborhoods (including traditionally under-represented groups) to facilitate understanding the diversity of the area and who will be directly or indirectly affected by new development and code changes in the corridor study area. At a minimum,

Metro Contract 935012 - Exhibit B  
Scope of Work

demographics should include population, age, employment status, home/land ownership, race/ethnicity, income level and education.

- Identify community-based organizations and interest groups working within the study area to understand the variety of community members doing business, living and working in the area and how they are organized.
- Document the array of stakeholder and interest groups, their sphere of influence, and their level of involvement relevant to community planning and development issues.
- Identify areas of need and opportunities for capacity-building in order to move forward with a stakeholder-based process to craft design and development standards.

**Deliverable 2.1:** Draft Memo 1: Community Demographics and Organization Summary

**Deliverable 2.2:** Final Memo 1: Community Demographics and Organization Summary

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### **Task 3. Research and summarize existing policies, plans and development conditions**

The outcome of Task 3 is to identify, analyze and summarize existing policies and development conditions in and around the project area, including a review of neighborhood livability. The expected activities for Task 3 include:

- Research and compile information on current and projected socio-economic and environmental conditions of the project area.
- Prepare a summary of existing policies, plans, economic conditions and market analyses that includes:
  - Existing plans, and assessment of recent history of policy discussions affecting the study area, noting especially any policy changes or assessments completed since the MAP report was drafted in 2012 and how they can provide a foundation for moving forward.
  - Current regulatory framework and language in that framework that hinders development that would achieve community goals as stated in the MAP
  - High level assessment of current land inventory for the study area, with land uses, ownership patterns, general infrastructure condition, transactional history, development trends, and/or other indications of the growth patterns in the corridor study area.
  - Analysis of the current real estate market, including considerations of land assessment noted above, nearby workforce, county economic development policies, and nearby / competitive submarkets
  - Projected potential impact new development over the next decade could have on the study area's businesses and residents, and also the potential impacts to surrounding neighborhoods, residents, and businesses.

Metro Contract 935012 - Exhibit B  
Scope of Work

- Perform an initial review of neighborhood livability and economic diversity including consideration of potential economic, environmental and other impacts, such as gentrification, that has occurred in the project area and surrounding neighborhoods, and the potential impact of changes to the development and design standards in the commercial areas. Summarize findings and key considerations.

**Deliverable 3.1:** Draft Memo 2: Summary of Existing Policies and Development Conditions; including review of neighborhood livability.

**Deliverable 3.2:** Final Memo 2: Summary of Existing Policies and Development Conditions; including review of neighborhood livability.

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#### **TASK 4. Assess understandings of and opinions about the MAP vision and related implementation steps**

The outcome of Task 4 is to identify the level of community knowledge of the McLoughlin Area Plan (MAP) vision in relation to the study area, the level of support for the vision and actions/policies necessary to implement it. The expected activities for Task 4 include:

- Compile a summary of policies, resources and/or programs needed to support the implementation of the community vision along the study area.
- Determine the most effective methods to specifically engage community members who will be most directly affected by the new development and design standards, including business owners and property owners, and people who are most commonly left out of policy-making processes - people with lower-incomes, cultural or language minorities, and others as identified through this assessment.
- Survey opinions about the study area (via questionnaire, interviews, focus groups and the like) to clarify prevalent opinion and issues of concern for the following sectors of community members:
  - Residents
  - Businesses and employees
  - Property owners
- Key information to elicit from survey respondents:
  - Level of familiarity and/or involvement in creating the McLoughlin Area Plan (MAP) as it relates to the study area
  - Extent to which they are familiar with, understand and/or support MAP's stated community vision and values for the study area
  - Identify how they perceive the benefits and impacts of changing the development and design standards to create a more walkable, transit-oriented environment along McLoughlin Boulevard and changes they could envision along the corridor.
  - Assess concerns about future neighborhood changes or the potential result of adjustments to local policies and future economic growth and development in the area, and their ideas for mitigating any perceived negative impacts

Metro Contract 935012 - Exhibit B  
Scope of Work

- Assess the present level of support for moving forward with implementation of the MAP vision.

**Deliverable 4.1:** Draft Memo 3: Summary Findings of Stakeholder Opinions

**Deliverable 4.2:** Final Memo 3: Summary Findings of Stakeholder Opinions

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### **Task 5: Assess community partners and develop Phase II engagement strategy**

The outcome of Task 5 is to identify opportunities for community engagement and partnerships necessary to create and successfully implement development policies in the corridor study area. The overarching goal is to work with the community to create an inclusive, comprehensive public engagement process that will result in knowledgeable, empowered community members and stakeholders. The long-term success of this effort will be measured by the quantity and quality of community and stakeholder participation in both Phase I and Phase II of the project, and by the understanding and support of the proposed development and design standards. As community partners are assessed and the Phase II engagement strategy is developed, building relationships and trust with the community will be key in achieving the desired outcome.

The expected activities for this task include:

- Interview stakeholders and interested parties, including elected officials, on the information learned in Tasks 1 and 2 and the actions needed to engage a diverse representation of study area stakeholders to create development policies that will address community disparities, actively seek to retain current residents and locally-owned businesses, and support the MAP vision.
- Identify effective methods to specifically engage community members who will be most directly affected by the new development and design standards, including business owners and property owners, and people who are most commonly left out of policy-making processes, including families with lower-incomes, cultural or language minorities, and other stakeholders as identified in Task 1.
- Identify strategic partnerships that could facilitate equitable economic opportunity, housing development, etc. in the study area.
- Outline a public decision-making process with a recommended committee structure that aligns with the County's community involvement principles and best practices, and that builds up to successful adoption of the development and design standards for commercial areas on McLoughlin Boulevard in the study area.

The consultant team will produce a public engagement plan for inclusive, comprehensive and equitable public outreach and engagement that provides opportunities for those who could be directly affected by the new development and design standards to participate in the process of creating policy and advocating for their interests. The process should also seek to involve, inform, educate and interact with those who will be indirectly impacted by the changes and/or who have an interest in the future of the Park Ave and/or McLoughlin Boulevard area.

## Metro Contract 935012 - Exhibit B Scope of Work

The process should focus on increasing the influence that previously marginalized members can have on these public policy decisions and also seek to touch the broad interests in the greater community.

The engagement strategy should also include explicit recommendations regarding the composition of any advisory or technical committees (if recommended) and the process by which individuals should be selected or appointed to serve on such committees.

**Deliverable 5.1** – Creation of a public engagement plan, including plans for and/or documentation of:

- Use of engaged community members to assist with outreach events and strategies to draw in a wider public;
- Various interactive techniques to engage the community, including reporting back to participants so that the community can see how their comments have been reflected in the development and design standards;
- Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people, and people of all ages), and
- How the plan will work to ensure that participants believe their views and ideas have been heard, even if not adopted.

**Deliverable 5.2:** Draft Memo 4: Proposed Public Engagement Strategy to develop and adopt new development and design standards for the study area that support community values and the MAP vision (Phase II)

**Deliverable 5.3:** Final Memo 4: Proposed Public Engagement Strategy to develop and adopt new development and design standards for the corridor study area that support community values and the MAP vision (Phase II)

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### **TASK 6: Proposed revisions to Scope of Work for Phase II**

The outcome of Task 6 is a set of proposed revisions to the Phase II Scope of Work for the Park Avenue Development and Design Standards project that will implement findings from Community Assessments completed in Task 4, continue the public involvement process and create new development and design standards. Integrating all findings and information gathered and set forth through Tasks 5, the consultant will refine and flesh out the Phase II scope and approach integrating the technical work, the proposed engagement strategy (Task 5), and the required governance and process steps required for adoption of code revisions.

The proposed revisions to the scope will clearly outline the appropriate roles and responsibilities for deliberation and decision-making for code adoption, including the role, composition and authority of any advisory committees (or other groups/committees that should be used during the project), project staff, consultant team members, the Planning Commission, Board of Commissioners and any other parties that need to have a role in developing, vetting and approving urban policy for the county.

Metro Contract 935012 - Exhibit B  
Scope of Work

**Deliverable 6.1:** Draft Memo 5: Proposed revisions to Phase II Scope of Work

**Deliverable 6.2:** Final Memo 5: Revised Phase II Scope of Work

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**TASK 7: Seek direction from elected officials on next steps for Park Ave  
Development and Design Standards Project**

The outcome of Task 7 is to share the full findings of the Phase I Community Assessment work with the Board of County Commissioners to report to the board regarding the level of community understanding of the MAP vision and the level of community interest in moving forward with code revisions that will support the types of development that the community values. In addition, the board will be presented with the proposed recommended revisions to the Phase II Scope of Work and the proposed public engagement process for Phase II, in order to obtain direction and approval to proceed with the next steps.

**Deliverable 7.1:** Report 1, compiling all final memos and deliverables under one cover with a brief introduction and/or executive summary.

**Deliverable 7.2:** Materials and presentation to Board of County Commissioners with report of Phase I findings and request for direction to continue with Phase II.



## Park Avenue Station Area Development & Design Standards Project

### Phase II: Community Engagement & Technical Work

## REQUEST FOR PROPOSAL

UPDATED DRAFT: August 1, 2018

### SECTIONS 3.1 – 3.5

#### 3.1 INTRODUCTION

Clackamas County, Oregon, working with the area residential and business community, is looking for an innovative and diverse team of public engagement, real estate and land use specialists to create development and design standards for commercial zones within ½ mile of the Park Avenue/McLoughlin Boulevard intersection in unincorporated Clackamas County that will support the community's long-term vision for the Park Avenue Station area.

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

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

Ultimate success for both phases of the project will be measured by the extent and quality of community and stakeholder participation, and by community and stakeholder understanding and support of the proposed development and design standards. Building trust with the community will be a key factor in achieving the desired outcome.

This project is being funded through Metro's 2040 Planning and Development Grant program. 2040 grants are awarded to cities and counties in the Portland region to help remove barriers to private investment in development, promote planning activity that makes land ready for development, and help to implement the Portland region's long term plan for livability, outlined in the 2040 Growth Concept.

Please direct all technical/specifications or procurement process questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.

### 3.2 PURPOSE STATEMENT

We are looking for a consultant team to work with us as:

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

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

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

**- Mission statement of the McLoughlin Area Plan, 2010**

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

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

### 3.3 BACKGROUND

**Location:** The project will focus on development and design standards for commercial and multi-family lands in unincorporated Clackamas County next to McLoughlin Boulevard within one-half mile of the Park Avenue Light Rail Station at the corner of Park Avenue and McLoughlin Boulevard. The project will also consider nearby unincorporated communities that may

## Metro Contract 935012 - Exhibit B Scope of Work

influence or be impacted by new development in the study area. This area is in the northwest corner of unincorporated Clackamas County, adjacent to the city of Milwaukie, nine miles south of downtown Portland.

Transportation infrastructure that is accessible to the project area includes State Highway 99E that directly serves area, State Highway 224 located just over a mile north of the project area, Interstate 205 located approximately 5 miles east of the project area via Highway 224, and Interstate 5 approximately 14 miles away via Highway 224 and Interstate 205. Light rail was added in 2015, supported by local, state and federal funds, to better connect the greater Oak Grove and McLoughlin area to the nearby cities of Milwaukie and Portland, Oregon.

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

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

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

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

A community-led planning effort -- the **McLoughlin Area Plan (MAP)** -- began in 2008 to look at the future of the McLoughlin area, and was endorsed and funded by Clackamas County. The overall goal was to enhance and revitalize the businesses, neighborhoods and communities in unincorporated Clackamas County between the cities of Milwaukie and Gladstone, and between the Willamette River and Interstate 205. **MAP** included six miles of unincorporated Clackamas County land east and west of the McLoughlin Boulevard corridor between the Park Avenue station and the city of Gladstone. The MAP process resulted in adopted community vision and values, and a community advisory group known as MAP-IT (the McLoughlin Area Plan

Metro Contract 935012 - Exhibit B  
Scope of Work

Implementation Team), which is still active today and is the co-sponsor of this project. The community remains highly engaged and concerned with all planning efforts in their community.

MAP adopted a vision framework and core values in 2010, with extensive input from the community, and later identified specific policies, projects and programs to implement that vision. It is imperative that these MAP components are addressed concurrently to provide a solid yet malleable framework for future evolution of core development, design and planning standards. The community's renewed energy and vigor are focused to ensure this project will provide democratic tools to ensure cooperative planning is employed in the creation of development and design standards that will bring their vision and values to reality.

In 2010-11, the county developed the **Park Avenue Neighborhood and Station Area Planning Project**, sponsored by a \$250,000 grant from the State of Oregon's Transportation and Growth Management Program. The intent of this project was to enhance the area for transit-oriented development to capitalize on opportunities available to the community based on the new Park Avenue light rail station. The project intent was to look at allowing transit-oriented development in the station area and develop an overall concept for transitioning both the McLoughlin Boulevard commercial corridor and the Park Avenue Station Area to a more pedestrian-friendly and connected commercial district. The plan also intended to create special zoning for all residential and commercial unincorporated Clackamas County land within a ½ mile of the Park Avenue light rail station. The plan addressed a variety of housing types, economic development and reinforced natural elements and developed new code language that would have allowed for mixed use development in the area. However, the project lacked a robust public involvement component and the plan was ultimately not adopted by the Board of County Commissioners in 2012 largely due to significant opposition voiced by some community members.

**Transitioning into the future:**

In spring 2017, the McLoughlin Area Plan-Implementation Team (MAP-IT) proposed to include a project in the 2017-18 Clackamas County Long Range Planning work program through which County staff would work with the community to apply for a 2040 Planning and Development Grant from Metro to create development and design standards along McLoughlin Blvd in the Park Ave Station Area that implements the MAP 1 and Map 2 vision for a more walkable, transit oriented community near the light rail station. The grant application was successful, and the Metro Council awarded funds to the project in late 2017.

A consultant was hired to complete Phase I of the project in \_\_\_\_\_ 2018, and the final Phase I report was submitted to the Board of County Commissioners in \_\_\_\_\_. The Board accepted the report and gave direction for the project to move ahead into Phase II.

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

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

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

### **3.4 PROJECT APPROACH**

Knowing that complex community dynamics exist and that the previous Park Ave Station Area Plan was not successful, there was a need for a community assessment before starting the technical work. Therefore, the project was divided into two phases as outlined below.

#### **Phase I: Park Avenue Station Area Community Assessment.**

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

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

The **major deliverables for Phase II** include:

- Technical work and community engagement to present options and vet proposed code refinements.
- Zoning and Development Code amendments and maps
- Additional recommendations for implementation tools and community development strategies

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

### 3.5 SCOPE OF WORK

The successful proposer must demonstrate extensive, innovative experience and ability in engaging and working with the public and stakeholders to develop land use regulations and development strategies that support the community's vision and values.

The project will be led by the consultant team, with support from County and Metro staff, community members and stakeholders, grounded in the community vision and values as described in the following documents:

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

The consultant will be expected to work closely with the community to implement the public engagement plan; identify existing conditions; draft, refine and test development and design standards; and produce Zoning & Development Code amendments and related materials to implement the standards.

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#### Task 2-1: Project Management

The consultant team will work with a team of community members as well as County and Metro staff. County and Metro staff will offer technical assistance to the project team to ensure that project work is well aligned with Metro grant funding and objectives.

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

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

**Deliverable 2-1.1** – Finalized **Phase II project milestones and meeting schedule** including dates and objectives for all established project check-ins, milestones, and meetings.

**Deliverable 2-1.2** – **Participation and facilitation of** calls/meetings with project team, partners, or community.

**Deliverable 2-1.3** – **Written summaries of calls/meetings** including outcomes and assigned action items.

## **Task 2-2: Draft and Refine Development and Design Standards**

The expected outcome of Task 2-2 is to have proposed amendments to the Zoning and Development Ordinance that:

- Are enforceable, realistic and, as appropriate, incremental
- Provide a clear path to achieving community goals;
- Are outcome-based;
- Reflect the input from and are widely-supported by developers, property owners and the public, and
- Incorporate lessons learned from tests on actual or hypothetical sites.

The consultant team will produce the following deliverables:

**Deliverable 2-2.1** -- Report 2: Review of best practices for land use regulations and development in mixed-use zones, with projects, tools and strategies to maximize:

- Transit-supportive development
- Long-term affordability and affordable housing
- Sustainability
- Local economic benefit
- Living-wage work
- Community health
- Natural environment
- Collaboration

**Deliverable 2-2.2** -- Implementation and facilitation of the public engagement strategy developed in Phase I and as directed by the Board of County Commissioners. Implementation of the strategy should include:

- Use of engaged community members to assist with outreach events and strategies to draw in a wider public; and
- Various interactive engagement techniques, including reporting back to participants so that the community can see how their comments have been reflected in the development and design standards; and
- Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people, and people of all ages); and
- Specific practices to help ensure that participants feel their views and ideas have been heard, even if not adopted

**Deliverable 2-2.3** -- Draft clear and concise development and design standards for the commercial and multi-family portions of the study area that:

- Are consistent with best practices, opinions and findings discovered in Phase I and throughout the Phase II process, including the findings of the Phase I livability assessment, and the McLoughlin Area Plan (MAP) community values and vision, and
- Facilitate incremental shifts toward the intended development goals for the area.

**Deliverable 2-2.4** -- Summary of draft standards tested on actual and/or hypothetical sites in the study area, with an assessment of how well the standards:

Metro Contract 935012 - Exhibit B  
Scope of Work

- Illustrate the outcomes and reflect MAP values and community input,
- Are effective in meeting the development goals as outlined in 9.1 (and/or refined through the public process),
- Respond to the real estate market / developer needs/ real while maintaining the integrity of the community vision and values for new development; and
- Are economically feasible for the preferred development types (including a feasibility analysis of actual or hypothetical sites to test the economic viability of proposed standards)

**Deliverable 2-2.5** – Report 3: Proposed development and design standards report including proposed zoning codes, map amendments, and outline of process necessary for adoption.

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### **Task 2-3: Implementation Strategies**

The expected outcome for Task 2-3 is clear communication and understandable materials to facilitate adoption and implementation of the new design and development standards. In addition, the implementation framework report is expected to provide guidance on any other recommended activities the County and community can take to support desired development in the area, taking into account findings from the Phase I livability assessment for nearby residential areas.

The consultant team will produce the following deliverables:

**Deliverable 2-3.1** -- Report 4: Implementation Framework Report that outlines steps that can be taken to support the implementation of the community goals through the new Park Avenue Station Area development and design standards. This should include prioritized strategies and policies that will deliver results consistent with the community values.

The report should also include tools the community can use to measure progress toward achieving the development outcomes and understand how they relate to the original goals of the community that were developed in MAP and throughout this process. These tools should include information on:

- meeting community goals through development,
- the type and quantity of development occurring that implements the standards,
- a way to record how market dynamics have influenced the rate of development

Finally, the Implementation Framework Report should include a base template for community engagement and development and design standards for planning future nodes along McLoughlin Boulevard.

**Deliverable 2-3.2** – Report 5: A comprehensive public engagement report that documents the engagement process undertaken and reports on performance measures to describe the success of the public engagement plan. Report should include all visual communications, graphic materials and meeting summaries.

**Deliverable 2-3.3** -- Adoption-ready maps and code text amendments for the Planning Commission and County Commission, including County Zoning & Development Code amendments to implement the proposed development and design standards, and recommended zoning and other policy changes to support future development and livability.



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**Deliverable 2-3.4** – Phase II: Presentation to the Board of County Commissioners. The materials presented to the BCC shall include:

- Report 2: Best Practices in Mixed Use Zones
- Report 3: Summary of Proposed Development and Design Standards
- Report 4: Implementation Framework
- Report 5: Public Engagement Report

**Park Avenue Development & Design Standards Project**

**Request for Proposal – Evaluation Procedure**

**4. EVALUATION PROCEDURE**

**4.1** *An evaluation committee will review all proposals that are initially deemed responsive and rank the proposals in accordance with the criteria below. The evaluation committee will then select the top candidates to participate in proposal interview / presentations. Interviews/presentations 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. The evaluation committee will recommend award of contract to the Project Management Team based on the highest scoring proposal. The Project Management Team reserves the right to accept the recommendations, 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**

<b><u>Category</u></b>	<b><u>Points Available</u></b>
General Background & Qualifications / Ability to Deliver the Project.....	15
Approach to Innovative Community Engagement.....	35
Approach to Creative Design & Development Standards.....	25
Approach to Equity.....	15
Fees.....	10

**4.3 Contract Negotiations**

*During negotiations, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fees that best represent the efforts required. If the County is unable to come to terms with the highest scoring proposer, negotiations shall be terminated and new negotiations will begin with the next highest scoring proposer. If the resulting contract contemplates multiple phases and the County deems it 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.*

*Park Avenue Development & Design Standards Project*  
**Request for Proposal – Proposal Contents**

**SECTION 5**  
**PROPOSAL CONTENTS**

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

- 5.1.1 Complete proposals may be mailed to the below address or emailed to [procurement@clackamas.us](mailto:procurement@clackamas.us). The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the proposal. If the proposal is mailed, an original copy and **four copies** must be included. The proposal (hard copy or email) **must** be received by the closing date and time indicated in Section 1 of the RFP.
- 5.1.2 Mailing address including hand delivery, UPS and FedEx:  
*Clackamas County Procurement Division  
Clackamas County Public Services Building  
2051 Kaen Road, 4<sup>th</sup> floor  
Oregon City, OR 97045*
- 5.1.3 County reserves the right to solicit additional information or proposal clarification from the vendors, or any one vendor, if the County deems it necessary.
- 5.1.4 Proposal may not exceed a total of **20 pages** (single-sided), inclusive of all exhibits, attachments or other information.

**PROVIDE THE FOLLOWING INFORMATION IN THE ORDER IN WHICH IT APPEARS BELOW:**

**5.2 General Background and Qualifications / Ability to Deliver the Project:**

- 5.2.1 Describe your firm/consultant team including your firm's experience (with an emphasis on projects similar to this one) and what distinguishes you from other firms doing similar work.
- 5.2.2 Describe the ability, skills and experience needed to meet the requirements in Section 3, Scope of Work, including how you would successfully accomplish the work of both major project phases on time and within budget:
  - 5.2.3.1 Phase I: Community assessment and public engagement strategy
  - 5.2.3.2 Phase II: Creation and implementation of development and design standards.
- 5.2.4 Provide credentials/experience of the individuals who would be assigned to this project, including resumes for each member of the consultant team.

**5.3 Approach to Innovative Public Engagement:**

- 5.3.1 How would you identify and use contributions from community groups and other local resources to support success of the project. How have you used community-driven outreach ideas with community participation?

Metro Contract 935012 - Exhibit B  
Scope of Work

- 5.3.2 The project involves community members, business owners, landowners, partners, stakeholders, various age (youth, middle, and senior ages) and economic levels, and other participants with a wide variety of viewpoints and interests. Describe how -- with such a diverse audience -- you would design a process and identify tools to ensure an informed public engagement, project transparency, participation and consensus toward common benefit is achieved.
- 5.3.3 Provide your past examples of effective public engagement outcomes, how they were measured and the success and lessons learned on unsuccessful events.

**5.4 Approach to Creative Development and Design Standards:**

- 5.4.1 Provide an example of using a values-driven, evidence-based approach to the creation of design and development standards.
- 5.4.2 Describe your experience with crafting clear, effective and adaptable code-based development and design standards. Include examples of standards you have created. If the standards were not implemented, please explain why.
- 5.4.3 Describe what methods you would use to build support for the proposed development and design standards among the diverse audiences described above.
- 5.4.4 Provide outcomes after development and design standards have been in place for a period of time. What does the project area look like today?

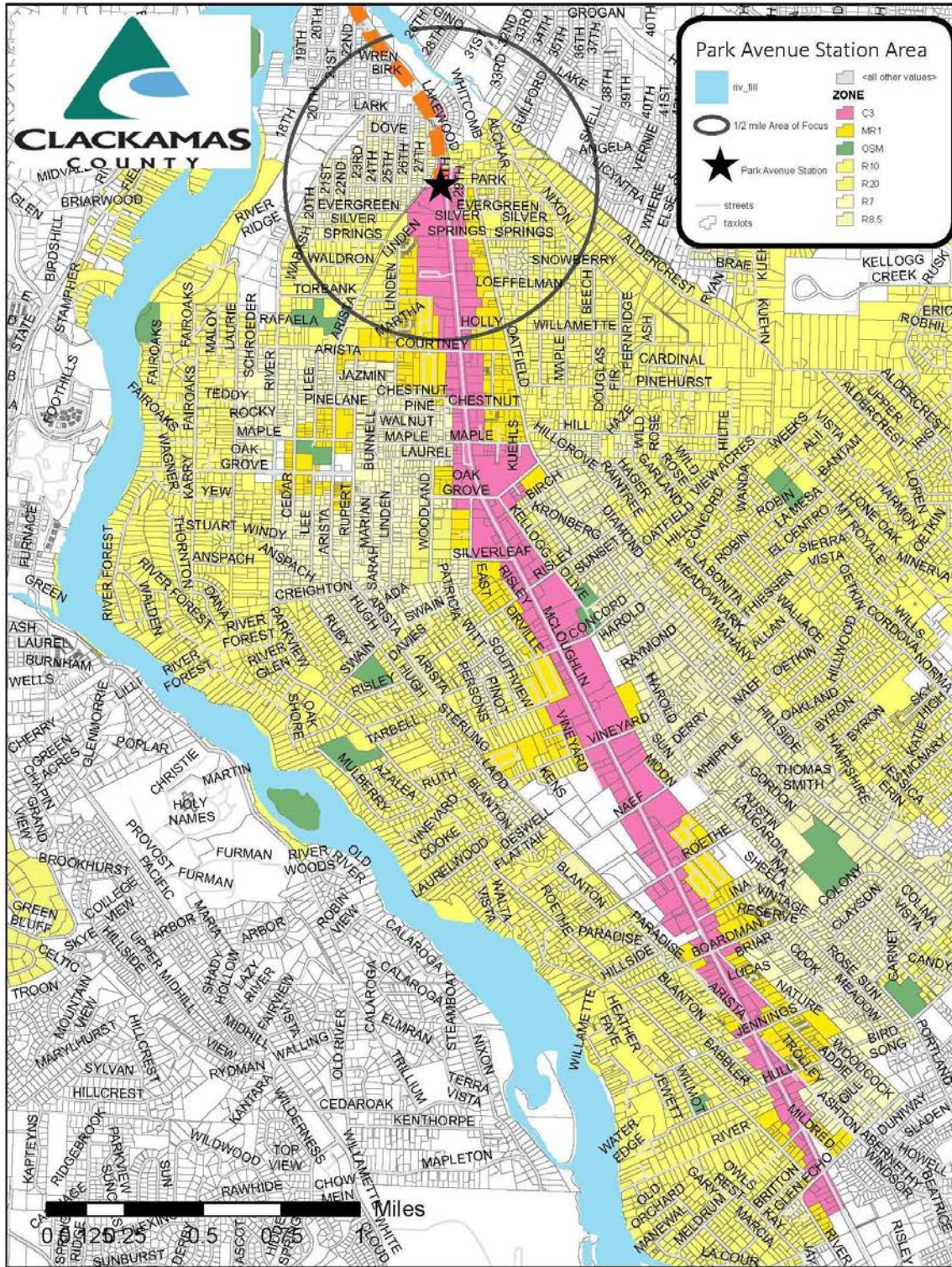
**5.5 Approach to Equity:**

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

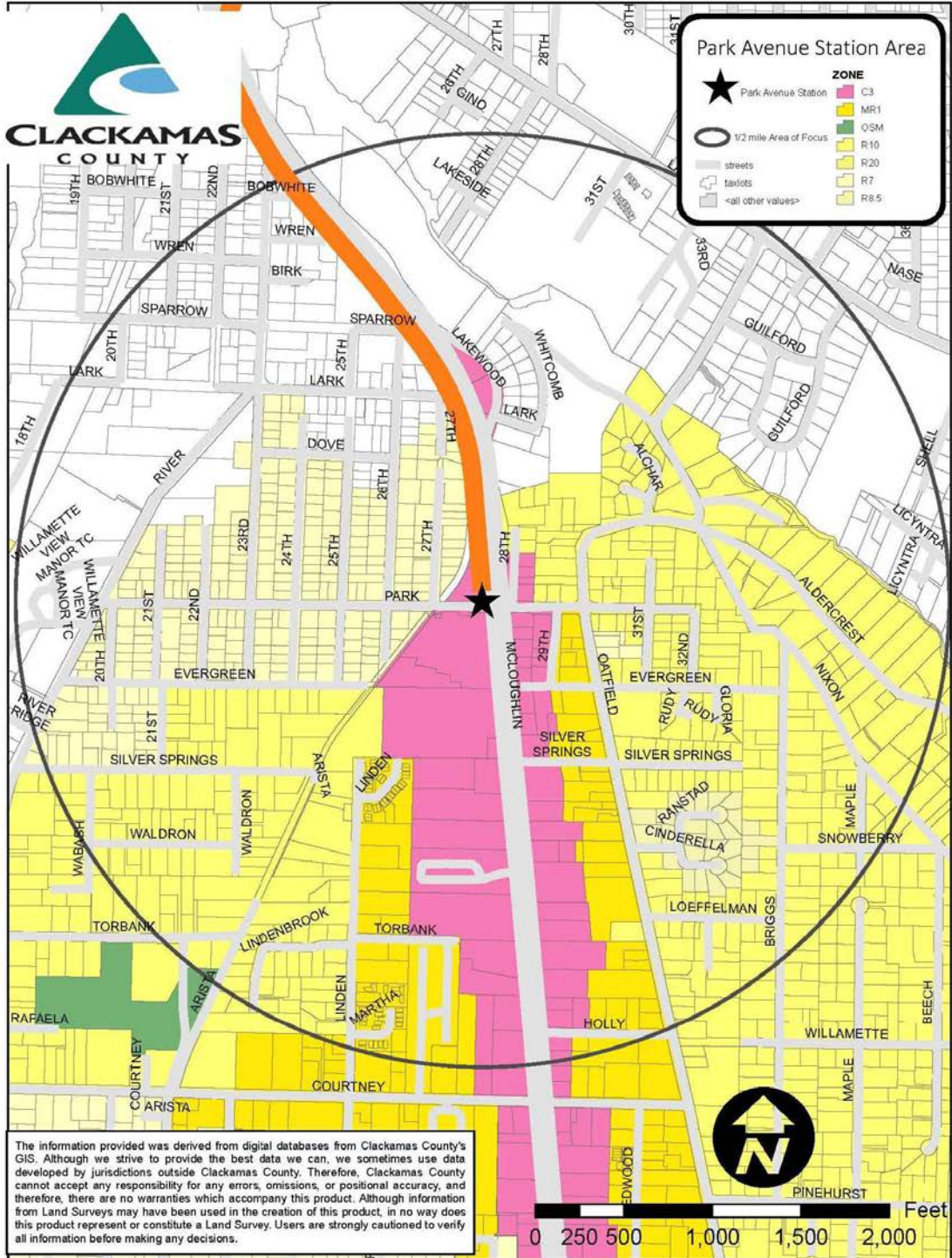
**5.6 Fees:**

- 5.6.1 Fees should:
  - Be on a time and materials with a not-to-exceed fee basis,
  - Be sufficiently descriptive to facilitate acceptance of a proposal, and
  - Have an outline of all estimated expenses, hourly rates for all assigned individuals, anticipated travel and other reimbursable expenses.
- 5.6.2 How would you optimize local, volunteer resources in the project?

MAPS: 1) McLoughlin Corridor with Project Area Circled; 2) Project Area Detail



Metro Contract 935012 - Exhibit B  
Scope of Work



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

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

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### Park Avenue Station Area Planning Project / Neighborhood Plan, 2010-12

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

*Lead:* Clackamas County Planning & Zoning Division

*Result:* Recommendations for land use and transportation changes were developed on three major topics:

- Circulation plan
- Open space / street environment
- Urban design elements and frontages, and regulating plan / desired land use

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

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### Tourism Development Task Force, 2008-09

*Purpose:* Study issues related to tourism and make recommendations to the Board of County Commissioners to help ensure continued tourism development.

*Lead:* Clackamas County Tourism Department

*Result:* The task force made the following recommendations related to the McLoughlin area:

- Create a tour route along McLoughlin Boulevard, but do not preclude future light rail
- Develop enhanced street connections between McLoughlin Boulevard and the Willamette River with public access areas/sites on the riverfront
- Explore possible acquisition of more public access to the river
- Establish a major visual icon at the entrance traveling south into Clackamas County on McLoughlin Boulevard to establish a sense of arrival.

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### Trolley Trail Master Plan, 2002-04

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

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

*Result:* Recommendations included the following:

- Develop five potential trailheads and 25 pedestrian access points from neighborhood roads
- Connect to community facilities including parks, schools, retirement communities and public transit

## Metro Contract 935012 - Exhibit B Scope of Work

- Develop intersection improvements and safety and security features, including strategically-placed lighting and good definition between the trail and adjacent neighbors

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

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

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

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

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

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

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

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

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

*Lead:* Clackamas County

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

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

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### **Oak Grove Transportation Growth Management Plan Draft, 1994-95**

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

*Lead:* Clackamas County Department of Transportation & Development

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

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

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



Metro Contract 935012 - Exhibit B  
Scope of Work

## 935012 Exhibit C

### IGA for 2040 Planning and Development Grant Park Avenue Development and Design Standards

#### Milestone and Deliverables Schedule for Release of Funds

Project milestone and specified grant deliverables		Date due*	Matching contributions	Grant payment
1	<b>Execution of Grant IGA.</b> a) Signed IGA document	Sept.15, 2018	Project staff: \$1,000	
2	<b>Phase I Community assessment contract</b> Draft contract with consultant team for Phase I	Sept. 30, 2018	Project staff: \$1,000	
3	Signed contract with consultant team for Phase I.	Oct. 31, 2018	Project staff: \$1,000	
4	Community Demographics and Organization Summary	Nov. 30, 2018	Project staff: \$1,500	Consultants: \$10,000
5	Summary of Existing Policies and Development Conditions	Nov. 30, 2018	Project staff: \$2,500	Consultants: \$10,000
6	Summary of Findings of Stakeholder Opinions	Dec. 31, 2018	Project staff: \$2,500	Consultants: \$10,000
7	Proposed Public Engagement Strategy Revised Scope of Work for Phase II	Jan. 31, 2019	Project staff: \$2,500	Consultants: \$10,000
8	<b>Phase 1 completion</b> <b>Board of County Commissioners hearings &amp; action</b> a) Final Report: Phase 1 b) Presentation to Board	Feb. 28, 2019	Project staff: \$1,000	Consultants: \$ 5,000

## Exhibit C

### Continued

9	<b>Phase II initiation</b> a) Completed Selection process for Phase II Consultant b) Determine remaining project milestones for Phase II c) Determine appropriate grant performance measures	April 30, 2019	Project staff: \$2,000	
10+	<b>Additional milestones (to be updated in Revised Exhibit C)</b>	TBD	Project staff: \$28,000	Consultants: \$120,000
11	<b>Board of County Commissioners hearings &amp; action</b> a) Action on proposed code changes b) Final reporting on grant and performance measures	Sept. 30, 2019	Project staff: \$2,000	Consultants: \$15,000
<b>GRANT PROJECT COMPLETION</b>  <ul style="list-style-type: none"> <li>• All grant project deliverables submitted by grantee and approved by Metro</li> <li>• All required fiscal documentation submitted or retained on file as appropriate</li> <li>• Final reporting on grant performance measures submitted and approved by Metro</li> </ul>			<b>Total Grantee Match</b>	<b>Total Grant Funding</b>
			Project staff: \$ 45,000	Consultants: \$180,000
			<b>TOTAL: \$ 45,000</b>	<b>TOTAL: \$180,000</b>

NOTE: Due dates are intended by the parties to be hard estimates of expected milestone completion dates. Grantee shall not commence work for a new milestone until the prior milestone deliverable(s) has been completed approved, unless Metro's project manager has provided written approval to continue, or to work on milestones simultaneously. If the Grantee anticipates that a milestone due date cannot be met due to circumstances beyond its control, it shall inform Metro in writing no later than ten (10) days prior to the due date set forth above and provide a revised estimated due date; and Metro and the Grantee shall mutually agree upon a revision to the milestone due dates set forth in this Agreement.