

# CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

## Policy Session Worksheet

**Presentation Date:** 1/15/20 **Approximate Start Time:** 9:30 am **Approximate Length:** 60 min.

**Presentation Title:** Climate Action Plan Development

**Department:** Transportation & Development – Sustainability & Solid Waste Program

**Presenters:** Eben Polk, Sustainability Supervisor; Cheryl Bell, DTD Assistant Director; Sarah Allison, Sustainability Analyst

**Other Invitees:** Dan Johnson, *DTD Director*, Clackamas Climate Exchange Members: Karen Buehrig, *DTD*, Nancy Bush, *Disaster Management*, Greg Geist, *WES*, Rick Gruen, *BCS*, Amy Kyle, *PGA*, Jon Legarza, *BCS*, Samara Phelps, *Tourism*, Dr. Sarah Present, *H3S*, Ellen Rogalin, *PGA*, Jay Wilson, *Disaster Management*, Samantha Wolf, *BCS*

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

- Board approval to move forward with issuance of the Request for Proposals (RFP) for a climate action plan.

### EXECUTIVE SUMMARY:

*The purpose of this planning session is to share and seek approval for the climate action plan scope of work prior to issuing the Request for Proposals (RFP), and to inform the BCC of interim actions underway now and/or while the plan is being developed.*

#### **Previous Board Direction**

The Board has directed staff to develop a comprehensive and inclusive climate action plan building off the 2008 Action Plan for a Sustainable Clackamas County and supporting the 2017 climate resolution [Resolution Number 2017-85] adopted by the Board of Commissioners. In the fall of 2019, the Board proposed a related Performance Clackamas goal:

*By 2021, a Climate Action Plan is adopted for our community with specific recommendations to reach the goal of being carbon neutral by 2050.*

The cross-departmental Climate Exchange, led by Sustainability and Solid Waste staff, has drafted a scope of work for inclusion in a Request For Proposals (RFP) to develop the climate action plan, while simultaneously pursuing climate actions that can proceed independently of the plan update, and that will advance the overall goal of helping the County achieve carbon neutrality by 2050.

#### **Scope of Work**

The scope of work is large, and a complete version is provided as Attachment A for Board's review. This summary highlights major elements of the scope, including primary deliverables, engagement, and the action areas that will be considered in the plan development.

#### Primary RFP Deliverables

The three main deliverables from this RFP are the climate action plan itself, three climate implementation plans, and a climate lens.

Climate action plan: The plan will frame the key issues around climate change, specifically as they relate to Clackamas County, and will include goals for reducing the county's greenhouse gas emissions and increase resilience to climate change. The plan will include an assessment of potential climate actions and their impact, cost-effectiveness, timeliness, co-benefits (such as health) and social or economic dimensions of actions.

Implementation plans: In order to strategically tackle the actions identified in the plan, the consultant will work with staff to develop three implementation plans, each covering a two year period. This deliverable is in response to direction from the Board on September 4, 2019. These will identify specific actions for staff to work on in two-year periods, prioritized and approved by the Board using a variety of criteria determined through the climate planning process. Stakeholders would provide input into shaping and updating these work plans periodically.

Climate lens: The third proposed deliverable is a climate lens intended to apply to County programs, policy decisions, operations and projects. The climate lens would serve as a tool for County staff and the Board to integrate the value of climate action and resilience in a few additional ways: as decisions arise that are not contemplated in the climate action plan; day-to-day organizational culture and operations; and in departmental level strategy.

Elements of a climate lens could include screening questions that help to identify planning and policy development processes that are relevant to or have an impact on our carbon footprint or climate resilience; guidance on whether to further analyze the climate impact of a particular course of action; suggestions for metric design in Performance Clackamas.

Question 1: The first two deliverables have been determined through prior policy sessions; the climate lens was suggested in a prior policy session. **Does the Board approve of the climate lens concept as outlined?**

### Engagement

Community engagement is a major element of this project. The County's plan should speak uniquely to Clackamas County's needs and opportunities, and reflect the diversity of our community. The RFP seeks a consultant who will bring their own expertise in this area, with the intent that community engagement approaches are finalized after the contract begins. There are some types of engagement that are pre-identified in the scope:

- the project will have a community task force to engage stakeholders and subject matter experts on the core decisions of the climate action plan
- the staff Climate Exchange will also serve an advisory role
- the Performance Clackamas Implementation Team assigned to the Board's goal will advise and support the process
- accessibility is a priority, including a website to engage those unable to attend in-person events
- engagement with County staff will also be an important element of developing this plan so that all staff are aware of the plan and understand their role in it.

The scope specifically seeks to engage youth, historically under-represented communities, and rural residents. Climate change impacts people differently, and this plan needs to be based on an understanding of those impacts in order to be effective. There are many organizations and groups across the county that have unique perspectives or roles in climate action, who will be engaged directly in the planning process. Members of the Board will be invited to participate in

engagement activities with the community and with key stakeholders, reflecting the priority the Board has put on these efforts.

Question 2: As acknowledged above, the engagement strategy will be shaped collaboratively with the selected consultant. **Are there any additional specific types of engagement that the Board would like to ensure are included in the scope of work, beyond those listed above?**

Question 3: Under the scope as currently drafted, specific engagement with and involvement of cities would be limited to notification and updates—a low level of engagement. Cities would likely have a widely varying levels of interest in participation. Any additional opportunities for engagement would thus likely have to be tailored to those levels of interest. **Would the Board like to proceed with the scope as drafted, or direct staff to identify additional options for participation by cities?**

### Action Areas

The actions in the climate action plan will address both County operations and opportunities more broadly in the community. While the plan will focus on action areas that the County has direct influence in, it will recognize that there are also many areas of action that must be led by other entities or individuals.

These actions may address ways to reduce our greenhouse gas emissions, increase resilience to climate change, sequester carbon in plants or soil, or support the transitions needed to accomplish those core actions. While these actions will be specific to Clackamas County, we can expect based on other climate action plans that action areas are likely to include:

- Reducing transportation emissions (typically around a third of a community's emissions) through a mix of strategies.
- Better, less carbon-intensive buildings that decrease overall energy consumed.
- Increasing use and generation of renewable energy.
- Community design, which has strong impacts on transportation and resilience to climate impacts. This will be particularly important given the growth the county expects to see in coming years.
- Opportunities in forestry, farming, and food to store more carbon and reduce footprint
- Supporting less carbon-intensive purchasing through repair and maintenance, buying locally produced products, and better information about the climate impacts of purchases. Consumption of products made outside of the region often doubles a community's greenhouse gas emissions.

### **Complementary and Interim Actions**

The process of developing the climate action plan will be essential for identifying long-range, multi-partner efforts that will be necessary to effectively fight and adapt to climate change. However, there are many actions that the County can take to address climate change before the plan is developed, particularly around County operations. Staff has conducted an operational greenhouse gas inventory for the County, and is in the process of conducting a community-wide inventory. Other climate actions that are currently underway or planned are:

- Renewable electricity purchase for County operations
- Low-carbon fleet plan/analysis
- Electric vehicle charging stations
- High Performance Building Policy
- Strategic Energy Management

In addition to these specific projects, the Board's proposed Performance Clackamas goal of achieving carbon neutrality by 2050 will result in additional efforts from departments across the County to address climate change. These efforts will be able to move forward in tandem with the climate action plan process.

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

Is this item in your current budget?       YES       NO

**What is the cost?** - In advance of an RFP, Sustainability and Solid Waste has allocated \$150,000 for the development of the Climate Action Plan. Responses to the RFP may result in a different cost estimate. Funding for actions stemming from the plan will need to be determined at the time actions are implemented.

**What is the funding source?** - The Sustainability and Solid Waste fund, with contributions from other departments as part of their participation in the Climate Exchange.

**STRATEGIC PLAN ALIGNMENT:**

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

The forthcoming climate action plan will impact all County departments, including their strategic business plans. Therefore, while the issue of this planning session does align with all of DTD’s Strategic Business Plan goals and the goals of many other departments, the larger alignment with Performance Clackamas is more relevant to this policy session.

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

Performance Clackamas includes the climate-specific goal of:

*By 2021, a Climate Action Plan is adopted for our community with specific recommendations to reach the goal of being carbon neutral by 2050.*

Achieving this goal is dependent on the issuance and completion of this RFP.

<b><i>Performance Clackamas goals</i></b>	<b><i>Climate Action Plan Alignment</i></b>
<b>Grow a vibrant economy</b>	Climate change will impact every sector of the economy, and is already impacting many. Wildfires, reduced snowpack, increased vulnerability to pests, and increased summer temperatures have a direct impact on a variety of businesses. Policies to reduce greenhouse gas emissions will also have impacts on businesses. In order to grow a vibrant economy, the County must look forward to both the physical and policy impacts of climate change.
<b>Build a strong infrastructure</b>	Climate change makes it more important that infrastructure be energy efficient and built or retrofitted to withstand the amplified hazards and stresses of a changing climate.
<b>Ensure safe, healthy, and secure communities</b>	Climate change is one of the greatest threats humans have ever faced. It impacts our health in many ways, and can undermine the safety and security of our communities.
<b>Honor, utilize, promote, and invest in our natural resources</b>	Our natural resources are both at high risk from climate change, and provide some great opportunities for reducing greenhouse gasses. By investing in our natural resources, they can be healthier and more resilient, while also protecting our community.

<p><b>Build public trust through good government</b></p>	<p>The climate plan will, by necessity, involve virtually every department in the County. It will also directly engage the community to help address this challenge. This collaboration and problem solving are key to good governance and building trust.</p>
--	--

**LEGAL/POLICY REQUIREMENTS:**

There is no legal requirement for Clackamas County with respect to climate change. In the 2017 resolution on climate the Board of Commissioners resolved to “renew its commitment to policies and practices, both within county government and throughout the community, that respond to the need to combat and adapt to climate change, for the sake of the future of our residents and our economy.”

A number of other policies and plans speak to climate issues and would benefit from continued coordination. For example, the Oregon Legislature required Metro to develop a strategy to reduce greenhouse gas pollution from the transportation sector in our region, which culminated in the regional Climate Smart Strategy in 2015. Our new Regional Waste Plan incorporates goals and actions that would reduce GHG emissions from our consumption and discard of materials. Tourism is developing a sustainable tourism strategy. The County’s Public Health Modernization process explicitly includes climate-related health issues.

**PUBLIC/GOVERNMENTAL PARTICIPATION:**

As noted above under the Performance Clackamas section, this plan will involve extensive participation by various departments within the County, other agency partners, and the community; therefore, broad engagement will be key in developing and implementing the plan.

As work progresses from the planning phase into development and implementation, the specific details will be developed. PGA has been included in the pre-work associated with this effort, and will continue to work with staff and the consultants in developing and implementing engagement strategies.

**OPTIONS:**

1. Direct staff to proceed with development of the RFP using the scope of work as presented.
2. Direct staff to proceed with development of the RFP using the scope of work as amended.
3. Direct staff to schedule a future policy session to continue discussion of the proposed scope of work.

**RECOMMENDATION:**

Staff respectfully recommends Option 1 – Direct Staff to proceed with development of the RFP using the scope of work as presented in this policy session.

**ATTACHMENTS:**

Attachment A. Draft Scope of Work for the Climate Action Plan RFP

**SUBMITTED BY:**

Division Director/Head Approval \_\_\_\_\_  
 Department Director/Head Approval \_\_\_\_\_  
 County Administrator Approval \_\_\_\_\_

<p>For information on this issue or copies of attachments, please contact Sarah Allison @ 503-742-4462</p>
--

## SECTION 3 SCOPE OF WORK

### 3.1 INTRODUCTION

Clackamas County is seeking proposals from vendors 1) to develop a comprehensive climate action plan (CAP) for the community and internal County operations to reduce greenhouse gas emissions, increase climate resilience, and identify sequestration opportunities, and 2) to develop a climate lens for County projects, programs and services. A central purpose of the CAP is to lay a path forward for Clackamas County as a thriving, low-carbon community.

The County adopted an *Action Plan for a Sustainable Clackamas County* in 2008, which established broad sustainability goals and initial emission reduction goals for carbon neutrality by 2050. The CAP proposed in this scope of work will expand and refine those adopted climate goals, and build on other climate-related policies noted below. It will also draw from the *2017 Greenhouse Gas (GHG) Emissions Inventory: Clackamas County Operations* and from a community GHG inventory that will be available by the beginning of the climate action planning process.

Development of the new CAP is projected to take between 12 and 18 months.

This project includes significant technical analysis and engagement of both community and internal stakeholders. As such, proposals may include a primary contractor and a subcontractor to cover these two areas of expertise. The primary contractor may focus on either area of expertise, but will be responsible for the coordination and integration of both.

The selection process under this RFP will occur in two phases.

1. Proposers submit a proposal demonstrating an understanding of the project and capacity to complete it, and
2. The top-ranking proposers are interviewed.

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

### 3.2 BACKGROUND

The Clackamas County Board of County Commissioners (Board) has five strategic priorities:

- Build public trust through good government
- Grow a vibrant economy
- Build a strong infrastructure
- Ensure safe, healthy and secure communities
- Honor, utilize, promote and invest in our natural resources

Climate change affects the County's ability to meet all these priorities. It threatens the long-term health, prosperity and safety of community members, and the viability of both the built and natural

environment. Some community members are more vulnerable to the physical, social, mental health, and economic impacts of climate change, depending on exposure to hazards, livelihood, personal resources, and the resilience and capacity of community resources. Climate change will also impact the ability of public agencies, including Clackamas County, to meet their missions.

Action to reduce the contribution of our community to climate change and to build resilience to climate change will support these strategic priorities. Such actions also have the potential to create significant benefits such as improved public health, air and water quality, and healthier farmland. Climate action includes reduction of greenhouse gas emissions, adaptation efforts to reduce vulnerability and risk, work to sequester carbon from the atmosphere into soils and forests, and supporting efforts such as education, advocacy, or support for economic and lifestyle transitions.

Climate actions also align with existing goals and priorities in a number of strategic plans that already exist in the County. The climate action plan provides an opportunity to influence new goals and priorities in these plans, which include:

- *Blueprint for a Healthy Clackamas County* to promote well-being,
- *Transportation System Improvement Plan*, the *Transportation Safety Action Plan*, and the upcoming *Transit Development Plan* for safer and healthier mobility,
- *Natural Hazard Mitigation Plan* for resilience and preparedness, and
- *Sustainable Tourism Destination Assessment* for economic development.

The Board of County Commissioners has adopted several policies related to climate change. In addition to the *Action Plan for a Sustainable Clackamas County*, the Board adopted the *U.S. Cool Counties Climate Stabilization Declaration* and a resolution on climate change in 2008. In 2017, the Board reaffirmed the County's climate goals in a resolution, and in 2018 the Board directed staff to lay groundwork for the updated countywide climate action plan contemplated in this RFP.

### **3.2.1 Context**

Clackamas County covers 1,879 square miles of urban, suburban, rural and wild land in north-western Oregon, and has a population of roughly 416,000 split fairly evenly between incorporated and unincorporated areas. Clackamas is one of three counties that make up the metropolitan area of Portland, Oregon. The county is partially within the boundaries of Metro, the regional government for the Portland area, and includes all or portions of 16 cities. More information about the county is available in the *Blueprint for a Healthy Clackamas County*.

The CAP will identify, analyze, and prioritize strategies to reduce direct and indirect (Scopes 1 and 2) emissions for the entire county, and will acknowledge imported (Scope 3) emissions. The community and operational greenhouse gas inventories reflect this range of emissions.

Because of the complex array of authorities and jurisdictions within the county, the CAP will need to address different levels of action. County government can take some direct action within its authority, some of which is countywide (e.g. public health), some of which is limited to unincorporated areas, and some of which is held in special districts. Other actions would require partnership with other organizations and jurisdictions (cities, special districts, regional government [Metro], institutions, state agencies, etc.). In some cases, advocacy, education and support may be the most appropriate type of action.

### **3.2.2 Planning**

Virtually every department in the County contributes to and experiences impacts from climate change. Several plans and documents that influence the work of these departments are listed in section 3.2.5 Background Documents. This list includes plans that already identify climate change as a concern, and plans that present opportunities for climate action. One role of the climate action plan will be to develop a comprehensive picture of the work being done through these dispersed plans and projects, and establish a process to (1) incorporate existing efforts into the CAP, (2) to track departments' progress and impact in areas that address the CAP's goals, and (3) identify how these plans should evolve to reflect the Board's priority on climate change.

### **3.2.3 Implementation**

The CAP will have a strong focus on and orientation towards implementation. To this end, plan development will consist of three phases.

1. An initial exploratory phase will identify potential climate actions through research and engagement.
2. A second phase of analysis will identify those actions that have potential to be effective, along with clear criteria with which to evaluate those potential actions.
3. A third phase will develop a series of three implementation plans for strategically chosen actions. This contract will include the development of one complete two-year implementation plan, and two high-level implementation plans for subsequent two-year periods.

County departments will have responsibility for actions in these implementation plans. Therefore, it is necessary for those departments to engage throughout the plan development process. This will cultivate ownership and depth of understanding of the selected actions. CAP actions should not duplicate actions from other plans, but rather compliment and connect them to provide support and increased awareness of the role such actions play regarding climate action.

One aspect of this contract that is key to implementation will be the development of a climate lens for County staff and elected officials to use across all policies, programs and projects, regardless of whether they are in the CAP. This lens will connect to the County's strategic plan, *Performance Clackamas*, and the related department strategic plans. The lens will be a tool to help surface decisions that have a bearing on the county's carbon footprint and our resilience to climate change, and ensure climate as an issue shapes those decisions. Engagement with department staff and leadership will be important to developing the climate lens that is relevant, designed to be incorporated into a diverse range of projects, and supported at the department level.

### **3.2.4 Ongoing Projects**

Several projects to reduce the County's operational GHG emissions are in development now and will proceed concurrently with the climate action planning process. These include projects to:



- evaluate the fleet for opportunities to reduce emissions,
- purchase renewable electricity for County operations,
- update the high performance building policy for new County facilities and major renovations,
- expand electric vehicle (EV) charging opportunities at County facilities, and
- develop clean diesel standards for County construction contracts and a replacement plan for County diesel vehicles.

These projects are an important part of the foundation for further climate work, and should be captured in the narrative of the resulting plan.

### **3.2.5 Clackamas County Background Documents**

- Natural Hazard Mitigation Plan (2019)
- Watershed Health Plan
- 10-year Forest Management Plan
- Clackamas County Transportation System Plan (“TSP”) (2013)
- Clackamas County Transportation Safety Action Plan (TSAP) (2019)
- Clackamas County Housing & Community Development Action Plan (2017)
- Clackamas County’s Community Health Improvement Plan / Blueprint for a Healthy Clackamas County (2018)
- Clackamas County Comprehensive Plan
- Clackamas County Bicycle and Pedestrian Master Plan
- Clackamas County Transit Development Plan (pending)
- North Clackamas Parks and Recreation District Master Plan (2014)
- Performance Clackamas
- Climate Resilience Evaluation & Awareness Tool (CREAT) Analysis (2019)
- Regional Economic Opportunity Analysis
- Sustainable Tourism Destination Assessment

## **3.3. SCOPE OF WORK**

### **3.3.1 PROJECT CONSIDERATIONS**

#### **3.3.1.1 Overall Criteria of Success**

A successful CAP will be:

- **Meaningful** – with implementable, measurable goals, milestones, and actions that will place our community on a path to becoming carbon neutral by 2050.
- **Data-driven** – aligned with scientific consensus; based on an analysis of our baseline carbon footprint, data about our community’s demographics, economy and ecosystems, and the effectiveness, cost-effectiveness, and benefits of mitigation and adaptation actions.

- **Integrated** – with strategies to reduce our carbon footprint and adapt to a changing climate embedded in the work of the County across departments, and supported through relevant plans and policies.
- **Transparent & accountable** – with community access and input into plan development, implementation, progress reports, and updates, such as through an advisory board; the County’s Performance Clackamas system should incorporate the climate strategy.
- **Coordinated** – with interdisciplinary efforts and actions to reduce our carbon footprint and build resilience efficiently and effectively, sharing a coherent story that all County’s departments can share.
- **Enabling of early action** – with some visible actions that the County can take quickly, while understanding that other actions take significant time to plan and implement.
- **Equitable** – inclusive, sharing the benefits of climate action widely, and engaging and accounting for those in the community who may be disproportionately impacted and/or have less opportunity to advocate for their own interests.
- **Supported** – by identifying the resources needed to implement the plan.

### **3.3.1.2 Project Management**

The consultant will work primarily with a core project management team of County staff. In addition, guidance for the project will come from the Board of County Commissioners, an advisory task force of community members and stakeholders (to be established early in the process), the Clackamas Climate Exchange (a group of staff from County departments assigned to coordinate and advance climate work in the County), and department directors identified as an implementation team for the climate goal in Performance Clackamas.

Coordination with the core project management team must include regular meetings, and monthly reports on the budget and scope, in addition to as-needed correspondence. The initial proposal and work plan should identify the frequency of core team meetings, as well as meetings with the Climate Exchange, advisory task force, Board of Commissioners, and the directors’ implementation team.

### **3.3.1.3 Outreach and Engagement**

Key considerations for outreach and engagement in this project are:

- Effectively communicating how climate change is an issue relevant to Clackamas County, how we as a community can do our part to address it, and how we will benefit from that effort.
- Explicit engagement of members of historically under-represented communities, including but not limited to communities of color, non-English speakers, youth, low-income communities, senior adults, and rural residents.
- Sensitivity to the fact that different actions, policies or programs to reduce the County’s carbon footprint will vary in relevance and attractiveness to rural, suburban, and urban communities, and that the contribution that community members can make will vary.
- Engagement that provides tools to both urban and rural community members that enable people to engage in and advocate for climate issues as individuals.

- Where appropriate, two-way consultation, dialogue, or consensus building with key stakeholders and input from subject matter experts and community members in evaluating pathways and actions to meet mitigation goals. (Distinct from one-way communication from County to the community.)
- Analysis of previous engagement efforts to honor investments of time and energy from the community.
- Use of digital resources (website, video, social media) to reach an expanded audience and archive information, in addition to more traditional outreach methods.
- Consistent engagement with County department leadership to foster ownership of actions.

#### **3.3.1.4 Resilience and a Just Transition**

A central purpose of the CAP is to lay a path forward for Clackamas County as a thriving, low-carbon community. Reducing emissions is essential to that purpose—this means encouraging and choosing changes in the everyday systems and practices that contribute to climate change. One way of embodying the commitment to equity outlined above is by following the principles of a just transition. This means that the County’s climate plan recognizes that these changes have different potential impacts on people, and works to support transitions from systems and practices that contribute to climate change, rather than imposing mandates, especially for individuals and communities with fewer resources.

Similarly, it is important to address the ways that climate change is already and will continue to impact our community, our economy, and the natural systems we depend on. Another way to embody a commitment to equity is to acknowledge that the impacts of climate change are and will be felt more keenly by some people than others in our community. As we seek to create a community that is more resilient to climate change, the County should be inclusive of those who are more vulnerable or who have strong vested interests in specific aspects of resilience to climate within our economy and natural systems. In some cases, the County can encourage resilience to climate change by incorporating it into complementary plans (e.g. Natural Hazard Mitigation Plan) that support these core objectives.

#### **3.3.2 TASKS AND DELIVERABLES**

The purpose of this solicitation is to contract with a multidisciplinary team to develop a CAP, climate lens, and implementation plans for the County that draw on technical expertise and community engagement to maximize the chances of effective execution of the plan. While subcontractors may be included in proposals to supplement the experience of the prime contractor, the prime contractor is responsible for providing project management and integrate the expertise of the team into a cohesive final product.

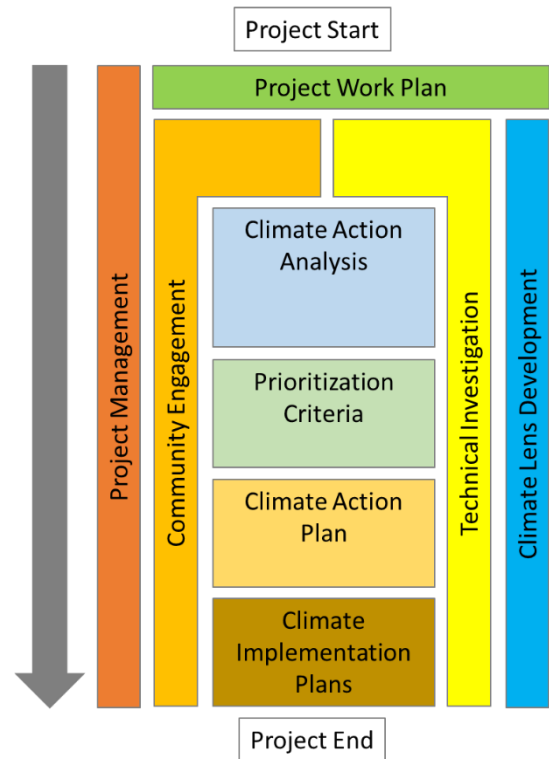
Because many of the elements of this project inform each other, the tasks and deliverables in this scope of work are not in strict chronological order. The graphic in this section shows the anticipated timing and overlap of different task areas, with project management running the length of the project.

As an overview, the selected proposer will evaluate existing conditions in terms of climate impacts and climate actions already underway, as well as institutional and community partnerships with the

potential to support new climate action. The proposer will work with the core planning team to engage internal County staff and the public to identify and refine opportunities for successful action.

After an initial exploration of potential actions through research and engagement (see Appendix A), the selected proposer will work with County staff to refine the potential actions to those that are feasible and effective, and to develop criteria by which to prioritize those actions for inclusion in implementation plans. This refined list of actions will be the basis for the overall climate action plan, a complete 2-year implementation plan, and two draft implementation plans for the subsequent 2-year work periods.

The selected proposer will perform the tasks listed below and will be expected to work closely with County staff and a community-based advisory task force to accomplish these goals. The final scope, schedule and fee will be determined during the negotiations stage of the selection process. It is expected that the CAP will take between 12 and 18 months to complete from the time Notice to Proceed is given to the selected proposer.



### **3.3.2.1 Project Work Plan**

The selected proposer will provide a detailed project work plan to address all tasks required in this solicitation. This deliverable is the finalization of the draft work plan required as part of the proposal response contents (outlined in Section 5). The project work plan will expand upon the draft and go into further details regarding the team’s approach to the project, based on the information provided in the proposal. It will be used to create the scope of work for the contract. The consultant team will draft a complete work plan for the County within 15 days of the Notice to Proceed.

The project work plan will include the overall goal of each task, specific sub-tasks, and which members of the consultant team are responsible for specific tasks and sub-tasks. The work plan will also provide a description of products, schedule, reviews, costs by task and discipline, anticipated meetings, an explanation of how the team will interact with each other and the client, and expected deliverables. The consultant will complete the project work plan in coordination with the Clackamas County project management team and will include a mutually agreeable schedule for project management check-ins and broader community meetings.

***Deliverable 1:*** Detailed work plan with tasks, sub-tasks, responsibilities parties, products, schedule, reviews, costs.

### **3.3.2.2 Project Management**

The consultant team will designate a consultant project manager to work with the County project management team to ensure successful completion of all phases of the project. Proposals should include the cost for minutes, with the understanding that the County may decide during negotiations to use staff for this task.

**Deliverable 2:** Agendas and meeting materials for calls/meetings with project management team, partners and/or the community.

**Deliverable 3:** Written summaries of calls and meetings including outcomes and assigned action items (to be confirmed in contract negotiations).

### **3.3.2.3 Technical Investigation**

Research and review of relevant information is a key task of this project. The consultant team will review relevant documents and research related topics to gain a comprehensive understanding of the project. The consultant team will provide summaries to document information gained.

One expectation of the technical investigation is to highlight major contributors of greenhouse gasses and areas of current or planned work that can be leveraged to reduce those contributions. It will also reveal areas at risk from climate impacts that may require actions to build resilience.

- Review documentation related to climate efforts in the county, including the 2008 *Action Plan for a Sustainable Clackamas County*, the 2017 *Operational GHG Inventory*, and the forthcoming community GHG inventory. The team can anticipate that the community GHG inventory will be available as soon as practicable after the Notice to Proceed.
- Review and summarize existing County plans for alignment with and potential to contribute to climate mitigation or resilience, including but not limited to:
  - Natural Hazard Mitigation Plan (2019)
  - Watershed Health Plan
  - 10-year Forest Management Plan
  - Clackamas County Transportation System Plan (“TSP”) (2013)
  - Clackamas County Transportation Safety Action Plan (TSAP) (2019)
  - Clackamas County Housing & Community Development Action Plan (2017)
  - Clackamas County’s Community Health Improvement Plan / Blueprint for a Healthy Clackamas County (2018)
  - Clackamas County Comprehensive Plan
  - Clackamas County Bicycle and Pedestrian Master Plan
  - NCPRD Parks Master Plan (2014)
  - Performance Clackamas
- Review and summarize County studies that inform potential climate actions, including:
  - Climate Resilience Evaluation & Awareness Tool (CREAT) Analysis (2019)
  - Regional Economic Opportunity Analysis
  - Sustainable Tourism Destination Assessment

- Review and summarize demographic data and previous community engagement efforts to develop a baseline for additional engagement that honors the time and input already provided.
- Review and summarize the policy and programmatic context for climate action, including federal, state, and local legislation, and initiatives or programs that support or restrict potential climate actions.
- Review and summarize climate action best practices, drawing from research literature, comparable climate action plans and IPCC Assessment Reports.

Based on the above investigation, the team will work with staff to develop an initial list of potential climate actions. These actions may focus on reducing greenhouse gas emissions, sequestering carbon, or increasing resilience and adaptation to climate impacts. Actions should include new opportunities for County operations and broader community actions, including:

- Transportation emissions – electric vehicles and charging infrastructure, heavy fleet emissions, less carbon-intensive commute opportunities, active transportation, public transit and tourism-based emissions.
- Energy use – renewable natural gas, renewable electricity generation, energy efficiency and building electrification.
- Chemical processes – refrigerant leakage, wastewater treatment, agriculture, construction materials and methods.
- Land use – transit-oriented development, urban heat mitigation, zoning regulations, forestry practices, urban forestry and park land.
- Consumption – waste minimization, informed consumption, food security and water use.
- Education and Awareness – support for Indigenous land management, education across communities, and policy advocacy.

The team will summarize opportunities and constraints revealed through this phase, and may combine the summaries listed below into one or more documents as seems most practicable.

***Deliverable 4:*** Summary report of documentation related to climate efforts in the County.

***Deliverable 5:*** Summary report of County plans for their alignment with and potential to contribute to climate mitigation or resilience.

***Deliverable 6:*** Summary report of County studies that inform potential climate actions.

***Deliverable 7:*** Summary report of demographic data and previous community engagement efforts.

***Deliverable 8:*** Summary report of the policy and programmatic context for climate action.

***Deliverable 9:*** Summary report of climate action best practices.

***Deliverable 10:*** Initial list of potential climate actions based on technical investigation.

#### **3.3.2.4 Community Engagement**

Community engagement for this project will include both the internal ‘community’ of Clackamas County staff and elected leaders, and the external community of the public, jurisdictional partners and others. County staff will have initiated engagement with many of these stakeholders prior to the consultant coming on board. There will be three main phases of engagement:

- initial engagement to support project development,
- primary engagement to develop the climate strategy, and
- follow-up engagement to share draft and final products.

The consultant team will plan and implement initial engagement early in the project, working with representatives from the Department of Public & Government Affairs. Initial engagement will include building early awareness of the process with known stakeholders, the development of a community advisory task force, and the development of web content to share information with the community more broadly. The development of the community advisory task force will include the recruitment and selection of task force members, facilitation of meetings, and an onboarding phase (for task force members) designed to affirm a shared vision and set of values for the plan, and help the task force gain cohesion as a group, prior to investigating specific strategies or actions. Initial engagement may also include staff-led presentations to the Board or department leadership, and other efforts to support the early work of the project.

The majority of engagement will occur after, and be informed by, the technical investigation. One expectation of the community engagement is to reveal some of the opportunities, challenges, and context for different actions; and to reveal community priorities regarding climate actions, or regarding different approaches to reaching outcomes necessary for emissions reduction. The consultant team will work with County staff to refine an engagement strategy that builds on the technical analysis to effectively reach stakeholders in a way that builds positive relationships, draws out key concerns and opportunities, and empowers community members to pursue climate action.

The consultant team will produce a creative strategy to engage the community equitably and effectively in accordance with the project considerations noted above. The strategy will identify key stakeholders, including under-served stakeholders. These may include those who have been active in climate work, those with relevant expertise, those who may experience negative impacts from climate change, those who may be concerned about potential negative impacts from climate action, those with important roles to play in implementation and others.

While the strategy may include diverse tools (e.g. focus groups, summits, community workshops, interviews, surveys, social media, etc.), it should include the following tools:

- **Community Advisory Task Force** – The consultant team will organize a task force of community members to advise the core project management team on how to best meet the County’s climate goals. Consultant responsibilities will include:
  - Advising and assisting the County in the selection of members, with a focus on bringing together diverse viewpoints and areas of expertise, and

- Facilitation of regular meetings, developing agendas, and potentially producing meeting minutes.
- **Stakeholder communication** – Key stakeholders should be largely represented on the task force. Additional, frequent communication with the organizations they represent—in the form of updates, announcements, presentations—is likely to be important.
- **Project Website** – The project website will share information and opportunities with the public during plan development, serve as a platform for updates as implementation moves forward, and provide one of a number of ways for the public and partners to provide input.
- **County Leadership Engagement** – County staff will take the lead on keeping County department directors, the County Administrator, and the Board of Commissioners informed of plan development through consultant-supported presentations and summary reports throughout the process.

The consultant team will implement the engagement strategy and summarize the results. The findings of this engagement will influence the selection of climate strategies and methods of implementation. Once documents are ready for public review, the consultant will promote them to community members who participated in earlier engagement, as well as making them generally available.

**Deliverable 11:** Strategy to engage the community equitably and effectively, including identification of key stakeholders, tools to be employed, and the required elements of a community advisory task force, project website and County leadership engagement.

**Deliverable 12:** Implementation plan for the community engagement strategy.

**Deliverable 13:** Results of the engagement and how those results impacted the selection of climate strategies.

**Deliverable 14:** Evaluation of the effectiveness of the engagement and recommendations for future engagement.

**Deliverable 15:** Initial list of potential climate actions based on community engagement.

### **3.3.2.5 Climate Action Analysis**

The consultant team will refine and organize the potential actions and action areas that emerge from the technical investigation and community engagement in an iterative fashion to facilitate prioritization. The team will conduct a series of evaluations of potential actions, narrowing to actions that are the most feasible and impactful. These analyses will use criteria approved by the Board, which may include but not be limited to:

- Feasibility (financial, political and technical),
- Impact of actions on climate mitigation or resilience,
- Cost-effectiveness,
- Expected timeline and opportunities for phasing,



- Equity impacts (including co-benefits and unintended consequences),
- Degree of County influence over the action, and
- How the action interfaces with legislation and other programs and initiatives beyond the County.

This evaluation of the impacts and considerations of potential actions will be the core of the CAP, and the basis for implementation plans to move actions forward strategically to achieve the County’s climate goals.

***Deliverable 16:*** Draft climate action analysis, including potential climate actions and their anticipated feasibility, impact on mitigation/resilience, cost-effectiveness, equity impacts, the degree of County influence, and legislative or programmatic considerations.

### **3.3.2.6 Prioritization Criteria**

The consultant team will work with County staff to develop criteria to evaluate and prioritize actions for inclusion in the implementation plans. These prioritization criteria may generate milestones and goals for the CAP in addition to the existing Performance Clackamas goal. This prioritization criteria may result in changes to the evaluations included in the strategy framework.

***Deliverable 17:*** Draft prioritization criteria and supporting materials for discussion with the Board for their final decision.

### **3.3.2.7 Climate Action Plan**

The consultant team will draft the full CAP to present the County’s overall climate strategy in a cohesive manner. The plan will be accessible, understandable, and engaging, with supporting figures, images, and graphs, and with text that is understandable to laypeople, with minimal jargon and clear definitions. The plan will be accessible to community members who speak languages other than English to ensure that non-English speakers have equal access. This may manifest as translations of the plan, or other culturally appropriate formats for sharing the plan.

The team will make a draft CAP available for public comment before it is finalized. The consultant team may, depending on the community engagement plan, work with the County’s Public & Government Affairs to publicize and gather feedback on the draft CAP through videos, social media, presentation documents and other materials. Technical elements related to specific actions may be contained in supporting documents intended for staff.

The CAP will include:

- **Framing Narrative** – An introduction to key issues, the planning process, the importance of this work, an understanding of the relevance of climate to Clackamas County, and resources for additional information.
- **Goals** – The desired outcomes that drive the actions of the plan.
- **Climate Action Synopsis** – A synopsis of mitigation, adaptation, and sequestration actions identified to address climate change, with summaries reflecting analysis of anticipated impacts and considerations noted above.

- **Implementation Strategy** – A summary of how the County will prioritize and work towards climate goals and actions through implementation plans, accountability, tracking, and monitoring.

**Deliverable 18:** Draft final CAP for public review that is accessible, understandable, and engaging to the public with a framing narrative, goals, strategy framework, and implementation strategy.

**Deliverable 19:** Technical and other supporting documents for staff use.

**Deliverable 20:** Summary of public input regarding the final draft of the CAP.

**Deliverable 21:** Final CAP.

**Deliverable 22:** Materials to present the final CAP to the Board of Commissioners and other public groups.

### **3.3.2.8 Climate Lens**

The consultant team will work with the core project team to develop a climate lens/guidelines that elected officials and County staff from all departments can use to evaluate the climate impacts of individual projects, regardless of their relationship to the CAP. This lens will apply to work planning and the development of department strategic plans, which are tied to the overall County strategic plan, *Performance Clackamas*. Development of the climate lens will draw on internal County engagement and the technical investigation. This can be a breakout deliverable provided in advance of the CAP.

**Deliverable 23:** Final climate lens/guidelines.

### **3.3.2.9 Climate Implementation Plans**

The consultant team will work with County staff to apply the final prioritization criteria to the identified actions to propose specific actions for three consecutive two-year implementation plans. The implementation plans will build on each other strategically, with a long-term vision for accomplishing the County’s climate goals. The second and third implementation plans will remain high-level, with the expectation that County staff will refine and finalize them when staff proposes them to the Board for adoption.

The consultant team will fully develop the first implementation plan, including:

- responsible agencies,
- key partners,
- budgeting and other resource needs,
- potential phasing,
- anticipated timelines, and
- incorporation into relevant County plans (e.g. *Performance Clackamas*).

If proposed actions have anticipated negative consequences, the team will identify and evaluate any opportunities to lessen or eliminate those impacts. The team will assist staff in developing materials to present the three draft implementation plans to the Board.

**Deliverable 24:** One full two-year implementation plan for implementation of initial climate actions.

**Deliverable 25:** Two high-level draft two-year implementation plans subsequent climate actions.

**3.3.3. Work Schedule:**

The project work plan (Deliverable 1) will provide deadlines for all deliverables noted in Section 3.3.1.

**3.3.4. Term of Contract:**

The term of the contract shall be from the effective date through **December 31, 2021.**

**3.3.5 Special Terms:** If any of the below special clauses need to be included in the RFP, please indicate:

- Travel and Other Expense is Authorized (County Contractor Travel Reimbursement Policy)
- Confidentiality (County data/information needs to be maintained in a confidential manner)
- Criminal Background Check Requirements
- Key Persons (the proposed vendor staff will not be substituted unless approved by the County)
- On-Call Provision
  
- Grant specific clauses (Provide a copy of the Grant section)

Insurance: We typically ask for Workers' Compensation, Professional Liability (\$1/\$2M), General Liability (\$1/\$2M), Automobile (\$1M), If need special insurance, please indicate:

- Abuse & Molestation
- Pollution Liability
- Technology Errors and Omissions
- Cyber Liability
- Medical Professional Liability (\$1/\$3M)
- Other: \_\_\_\_\_

## **Climate Action Plan Scope of Work**

### **Appendix A. Potential Areas of Analysis for Community-Wide Climate Action**

The following list identifies areas of action with the potential to contribute towards a carbon-neutral, climate-resilient community; this is intended as a representative list that addresses most of the major sources contributing to climate change. The process to develop a climate action plan may identify other action areas.

The planning process is anticipated to assess the potential, importance, cost effectiveness, and benefits of these various action areas. It will identify priorities, goals, and milestones, and include specific next steps within work plans that support the overall climate plan.

Some of these are areas where the County may have some direct influence, or is already taking affirmative steps; in other cases, the County's role may be to encourage, advocate, support, or partner with others.

#### Transportation

- electric vehicles
- more efficient fossil fuel vehicles
- alternative renewable fuels (e.g. biodiesel)
- low-carbon freight
- more effective bus and rail transit, and ridesharing options

#### Community Design / Planning

- electric vehicle charging infrastructure
- more and safer access for active transportation on streets and trails (age 8 to 80 friendly)
- encouraging a mix of destinations that allow more healthy low-carbon trips (e.g. concepts like 15 minute neighborhoods)
- reduced or more flexible car parking requirements

#### Clean, Renewable Energy

- increased customer enrollment in renewable energy options
- more local solar and renewable energy

#### Better Buildings

- increased energy efficiency retrofits
- new net zero buildings
- more efficient residential and commercial building envelopes and heating and cooling technology
- LED lighting
- refrigerant management

#### Healthy Food & Farmland

- Increase practices that store carbon in soils
- Promote the consumption of more local, organic food

- Adopt more regenerative agriculture practices
- Reduce fossil-fuel based fertilizers
- Encourage plant-based diets

#### Forests & Trees

- recover or promote urban tree canopy
- encourage forestry practices with a lower carbon footprint
- advocate for financial rewards for forest owners adopting practices that store carbon
- support a mix of forest management, harvesting, and use of trees that optimizes lifecycle carbon sequestration
- continue to explore the role of mass timber in replacement of carbon-intensive construction practices

#### Low-Carbon Economy & Jobs

- Support and encourage businesses adopting low-carbon practices or that provide climate solutions

#### Waste Reduction & Waste Management

- Reduce wasted food
- Composting or recovering energy from residential and commercial food waste
- More sustainable consumption choices (durable goods)
- Improved recycling opportunities
- Support right-to-repair and repair businesses

#### Resilience & Adaptation

- Distributed energy generation and storage (e.g. batteries)
- Support for tourism and other economic sectors vulnerable to climate or seeking to transition to lower carbon approaches
- Actions to support important natural systems (e.g. fisheries, streams, healthy forests, pollination)
- Preparedness for drought, hotter summers, and fire
- Preparedness for flooding
- Preparedness for public health impacts of climate change
- Policy Leadership