

Park Avenue  
Development & Design Standards Project  
**Phase I: Park Avenue Community Assessment**  
**SCOPE OF WORK**  
October 9, 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 between the cities of Milwaukie and Gladstone.

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 to support 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.

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.

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,

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 in and facilitation of 12 calls/meetings** with project grant team.

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

**Deliverable 1.4** – **Attendance at and participation in 3 community meetings, such as MAP-IT meetings, to update the partners and community on the progress of the project and gather input into the Community Assessment findings**

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## **Task 2: RESEARCH - Document community demographics and organizations and summarize existing policies, plans and development conditions**

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 who 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, 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 in Phase 2 to craft design and development standards.
- Identify, analyze and summarize existing policies and development conditions in and around the project area, including a review of neighborhood livability. Include the following items:
  - Current and projected socio-economic and environmental conditions of the project area.
  - 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 those changes or assessments can provide a foundation for moving forward.
    - The current regulatory framework and any language in that framework that could hinder the type of development that would achieve the community goals as stated in the MAP vision and goals.
    - High level assessment of current land inventory for the study area, including land uses, ownership patterns, general infrastructure condition, transactional history, development trends, and/or other indications of the growth patterns.
    - Analysis of the current real estate market, including considerations of land assessment noted above, nearby workforce, county economic development policies, and initiatives and nearby / competitive submarkets
    - The projected potential impact new development over the next decade could have on the study area's businesses and residents, as well as the potential impacts to surrounding neighborhoods, residents, and businesses.
- Perform an initial review of neighborhood livability and economic diversity including consideration of potential economic, environmental and other impacts, such as gentrification/displacement, that have occurred in the project area since the opening of the TriMet Orange Line and the Park Ave Light Rail.

**Deliverable 2.1:** Draft Memo 1: Community Overview and Development Trends that includes demographics and organizational summary, summary of existing policies and development conditions.

- This memo should include a clear statement of the “vision” outlined in the existing MAP documents that will be the foundation for Task 3 – Education and Outreach
- The memo shall include a specific section on the initial review of neighborhood livability and economic diversity in the study area. It shall include information about potential economic, environmental and other impacts, such as gentrification and/or displacement that has occurred in the project area since the opening of the TriMet Orange Line and the Park Ave Light Rail station. The section shall identify Tasks to include in Phase 2 of the project that would address the potential impact of changes to the development and design standards in the commercial areas on the surrounding neighborhoods and actions that could be taken to mitigate the potential negative changes to neighborhood livability.

**Deliverable 2.2:** Final Memo 1: Community Overview and Development Trends that includes demographics and organizational summary, summary of existing policies and development conditions. This memo should include a clear statement of the “vision” outlined in the existing MAP documents that will be the foundation for Task 3 – Education and Outreach

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### **TASK 3. EDUCATION and OUTREACH- Verifying the Vision**

The outcome of Task 3 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. In addition, these activities will identify opportunities for community engagement and partnerships necessary to create and successfully implement development policies in the corridor study area.

The expected activities include:

- Compile a summary of policies, resources and/or programs needed to support the implementation of the MAP community vision along the study area.
- Determine the most effective methods to specifically engage community members who could 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
- Elicit key information 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
- 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.
- 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
- Assess the present level of support for moving forward with implementation of some or all of the MAP vision.
- 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 and design policies that will address community disparities, actively seek to retain current residents and locally-owned businesses, and support the MAP vision.

**Deliverable 3.1:** Presentation summarizing research findings and impact on the Park Ave Study Area

**Deliverable 3.2:** Draft Survey proposed to gather input on level of understanding of MAP Vision

- Survey will be developed in an online format, but also in a format that can be collected without a computer

**Deliverable 3.3:** Final Survey proposed to gather input on level of understanding of MAP Vision

**Deliverable 3.4:** Targeted attendance at up to 3 standing meetings to encourage neighborhood and residential participation in the survey.

**Deliverable 3.5:** Intercept survey at the Park Ave Light-rail station to capture input from public transit riders

- The consultant will prepare the materials for the interview and Pyszka will attend. County staff will provide staff and/or volunteers to assist with outreach.

**Deliverable 3.5:** Strategic Roundtable interviews (up to five stakeholder discussions). Examples of the types of roundtable interview groups include: Retail business owners, manufacturing/non-retail business owners; Commercial property owners; manufactured home park/ multi-family property owners; senior housing residents; affordable housing advocates

**Deliverable 3.6:** Draft Memo 2: Summary Findings of Survey collected through neighborhood meetings, intercept survey and strategic roundtable interviews

**Deliverable 3.7:** Final Memo 2: Summary Findings of Survey collected through SurveyMonkey; Strategic Roundtable interviews and Community-wide meeting

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## **Task 4: Recommended Phase II engagement strategy and governance**

The outcome of Task 4 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 3, continue the public involvement process and create new development and design standards. Integrating all findings and information gathered and set forth through Tasks 4, the consultant will refine and flesh out the Phase II scope and approach integrating the technical work, the proposed engagement strategy, 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.

An additional outcome of Task 4 is to identify opportunities for community engagement and partnerships necessary to create and successfully implement development policies in the corridor study area during Phase 2. The overarching goal is to build on 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:

- 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.

The process should focus on increasing the influence that previously marginalized members or the community 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 4.1:** Draft Memo 3: Proposed revisions to Phase II Scope of Work, including an engagement strategy and a governance approach.

- A. The engagement strategy that includes 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 broader community, including reporting back to participants so that the community can see how their comments have been reflected in the development and design standards;
  - Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people, and people of all ages), and
  - How the plan will work to ensure that participants believe their views and ideas have been heard, even if not adopted.
- B. The governance approach will include information regarding:
  - 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.
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**Deliverable 4.2:** Final Memo 3: Revised Phase II Scope of Work, including an engagement strategy and a governance approach.

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## **TASK 5: DIRECTION - Seek direction from elected officials on next steps for Park Ave Development and Design Standards Project**

The outcome of Task 5 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 5.1:** Report 1, compiling all final three memos and deliverables under one cover with a brief introduction and/or executive summary.

**Deliverable 5.2:** 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 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

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.

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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.



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## 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:

- 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.

**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?

- 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:**

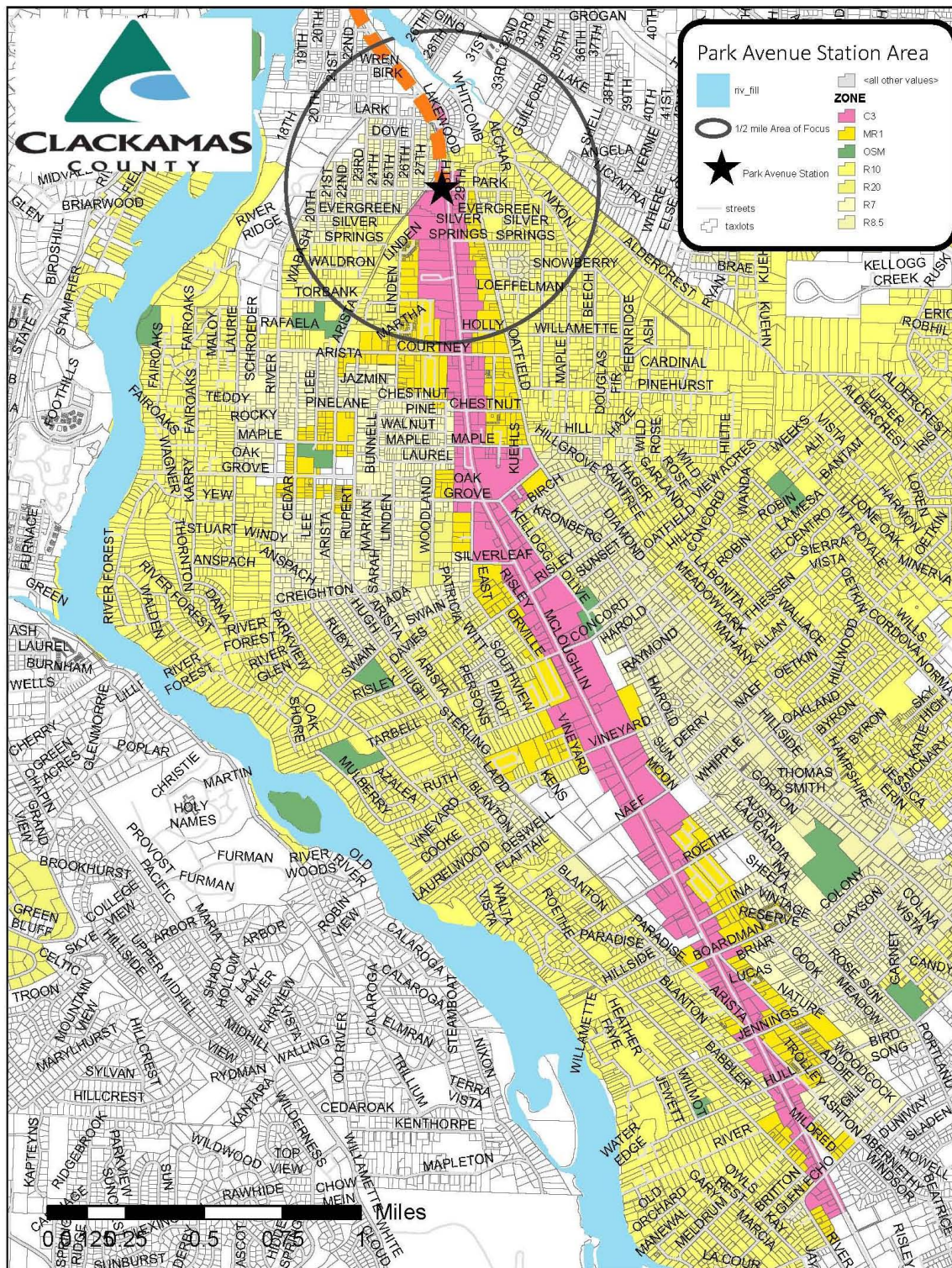
- 5.5.1 Describe how you would apply equity principles throughout all aspects of the project, including ensuring representation from under-represented communities.
- 5.5.2 The use of COBID-certified minority-owned businesses, woman-owned businesses, businesses that service disabled veterans, owned and 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**









## 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

- 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.

