City of Oregon City
Comprehensive Plan Update
Request for Proposals
Released: February 14, 2020

SECTION 1 – PROCUREMENT INFORMATION

Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFP Release</td>
<td>February 13, 2020</td>
</tr>
<tr>
<td>Proposals Due</td>
<td>Thursday, March 5, 2020, 3:30 pm</td>
</tr>
<tr>
<td>Contract Award Announcement</td>
<td>Tuesday, March 10, 2020</td>
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</tbody>
</table>

Inquiries

Inquiries shall be directed to Pete Walter, the City Project Manager, by phone (503) 496-1568 or email pwalter@orcity.org. The proposal must be received at the City of Oregon City, Community Development Department, attn:

- City of Oregon City
- C/O Pete Walter, AICP, Senior Planner and Project Manager
- P.O. Box 3040 Oregon City, Oregon 97045-0304
- No later than 3:30 P.M. on March 5, 2020

Proposals received after this date and time will not be accepted.

Any Proposer seeking information, clarification, or interpretations from any other City official or City employee is advised that such material is used at the Proposer’s own risk. The City will not be bound by any such information, clarification, or interpretation. Following the Proposal submittal deadline, Proposers shall continue to direct communications to only the City Project Manager. The Project Manager will send out information to responding companies as decisions are concluded.

Electronic Submittal

The proposal shall be submitted electronically to pwalter@orcity.org by 3:30 P.M. on Thursday, March 5, 2020.
SECTION 2 - PROJECT PERSONNEL

Pete Walter will serve in the capacity of City Project Manager associated with day-to-day project administration. Pete Walter will be assisted with project management by Senior Planner Christina Robertson-Gardiner. Laura Terway, AICP, Community Development Director, will provide general project oversight.

Additional City planning staff will assist with public engagement at meetings, if available. The Planning Division consists of the Community Development Director, two Senior Planners, a Planner, and an Assistant Planner. There are no administrative staff. GIS Staff will be available for technical support and analysis.

SECTION 3 - PROJECT BACKGROUND AND PURPOSE

The City of Oregon City is seeking proposals from qualified consulting firms to update the Oregon City Comprehensive Plan.

The project is a Comprehensive Plan update for the City of Oregon City. The current Comprehensive Plan does not adequately reflect the needs of all community members in Oregon City. Not only has our population changed, but previous outreach measures were not successful in soliciting input from those not already connected to local government. Traditional outreach methods coupled with long and complicated documents written only in English fail to engage a wider range of community members who really need to be heard. For example, the 2004 Comprehensive Plan is organized by state land use goals. While easy for planners to understand, may cause confusion or a barrier for participation.

A new approach is needed which ensures that all community members are given opportunity to participate in a collective vision for the future that reflects our values and equitably supports all. Care is needed to assure marginalized community members have a voice in a manner in which they feel comfortable participating. Outreach will include both empowering the community with information as well as listening to a diverse array of members of our community. By working together to create a document reflective of the entire community, we will empower people to participate in the future city decisions while creating future leaders. A more supported community is a more resilient community.

The scope of this grant supports the overall project with:

- **Community Engagement Plan for the Community Vision.** The plan will identify strategies for engagement to allow the public to create a Community Vision.
- **Community Engagement Plan for the Comprehensive Plan Update.** The plan will identify strategies for engagement during the Comprehensive Plan Update process.
- **Community Engagement Tools.** The toolkit of engagement methods will be the avenue to solicit participation during the creation of a Community Vision.
- **A Supplemental Housing Needs Analysis.** The analysis will supplement the recently completed housing needs analysis by identifying assumptions in the HNA and updating assumptions based on recent code amendments and other policy assumptions for informed and strategic decisions while updating the Comprehensive Plan.
• **An Economic Study.** The high-level analysis will provide an understanding of how Oregon City is meeting the needs of our community members for informed and strategic decisions while updating the Comprehensive Plan.

• **Findings to adopt the Housing Needs Analysis and Economic Study.**

• **Attendance at a few meetings.** Presence at a few select meetings will allow empower the community and decision makers in order to develop and adopt the products.

**Timing**

The City anticipates that the Comprehensive Plan update will begin in March 2020 and be completed and adopted by the end of 2021. The consultant is responsible for completion of the Community Engagement Plan for the Community Vision and the associated Community Engagement Tools within a few months of signing the contract and completion of all Tasks by May 31, 2021.

**SECTION 4 - SCOPE OF WORK**

The scope of work is attached as Attachment 2. The scope of work for this project has already been prepared pursuant to an approved contract with DLCD.

The overall project will be initiated in winter, 2020 with this project funded by a Technical Assistance Grant from DLCD and the City of Oregon City. The general purpose of this project is to work with the community to create community engagement plans, tools to implement the community engagement plans, and initiate an economic study and a supplemental housing needs analysis. The City staff will then implement the tools created in this project to solicit direction on the future of Oregon City from the public.

This project will be followed by a subsequent related project to use the public feedback and data from this project to compose the Community Vision and Comprehensive Plan Update. The project will be funded by a Transportation and Growth Management (TGM) grant from Oregon Department of Transportation (ODOT), along with supplemental funding from the City of Oregon City. The work will include writing the Community Vision, facilitating a series of summits to complete each chapter of the Comprehensive Plan Update, and submitting a Legislative application to adopt the updated plan.

The consultant will be responsible for the specific deliverables in the scope of work attached to this RFP. The Consultant’s proposal will be evaluated to ensure that the required deliverables can be met within the time period identified.

**Project Budget**

The overall budget is $53,500. Grant funding is provided from two sources, $42,500 from a Technical Assistance grant from the Department of Land Conservation and Development (DLCD) and $11,000 from the City of Oregon City.

**SECTION 5 - PROPOSAL FORMAT**

Proposals should be organized in the following format, with each component receiving an evaluation score for a total of 100 points.
1. Introductory Letter (10 points)
The letter shall name the person(s) authorized to represent the Consultant in any negotiations and name of the person(s) authorized to sign any contract, which may result. The letter shall indicate insurance carried by the Consultant. The proposal letter shall be signed by an authorized representative of the Consultant.

2. Minimum Qualifications (20 points)
These criteria relate to the firm's minimum capabilities and resources in relation to this project, and provide a reasonable basis on which to evaluate potential Consultants.
- The Consultant must have the resources available to perform the work for the duration of the project.
- The Consultant must have successfully performed at least one contract with a public or private agency of similar size to the City of Oregon City within the last five (5) years, with services similar to those expected by the City for this contract.
- The Consultant must have successfully completed at least five (5) similar projects within the last ten (10) years.
- Consultant shall employ the services of suitably qualified planners, economists, and/or other related fields deemed necessary to successfully complete the project.

3. Project Team (20 points)
This criterion relates to key project leadership and staff, including any sub-consultants. The basic question is: How well does the team's qualifications and experience relate to this specific project?

Additionally, please describe the project principal’s experience in project management and describe how responsibilities will be assigned and managed, how decision points and milestones will be identified and how the project team will manage the costs of the project and ensure that the available resources are used in an efficient manner to meet the objectives of the proposal.

Please Include Information about:
1. Project principals experience on similar projects.
2. Extent of the project principal’s involvement in the project
3. Names of other team members or project managers who will be performing the work on this project and their responsibilities.
4. Experience of key staff.
5. Unique qualifications.

4. Project Understanding (10 points)
Please describe your understanding of the project and what creative approaches you may have for meeting the Required Deliverables within the project time frame.

5. Project Approach (30 points)
This criterion is the heart of the response and deals with the Consultant’s ability to clearly define the actions to be taken to deal with the objectives and problems outlined in the scope of work. It should reflect the scope of work and provide a schedule that indicates tasks, milestones, and staff assignments.
The project approach shall demonstrate practicality, effectiveness, and be tailored uniquely to Oregon City, particularly with respect to creation of a community engagement plan, creation of tools to implement the community engagement plan, and implementation of the community engagement plan.

The Consultant shall include an estimated fee for services to be used by the city for budgetary purposes including the number of hours proposed for the services required, deliverables, due dates, expenses and hourly rates. The fee estimate will not be used as an evaluation criterion.

6. Support Information (10 points)
Support information must be limited to that which is pertinent to the proposal. Material must include references and may include graphs, charts, photos, resumes, certificates, examples of similar projects, etc.

SECTION 6 - PROPOSAL REVIEW, EVALUATION, AND SELECTION

Review
The City of Oregon City will award a contract to the Consultant whose proposal would be most advantageous to the City. City Staff will evaluate proposals and decide on those people to be interviewed. The City reserves the right to interview applicants at its sole discretion. A selection committee will evaluate applicants, rank the proposals, and make recommendations to the City. The City has the right to require any clarification or change it needs to understand the Consultant’s approach to the project and view of the work scope.

Any Consultant who submits a proposal shall certify that the Consultant has not and will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055 or against a business enterprise that is owned or controlled by or that employs a disabled veteran as defined in ORS 408.225.

Evaluation
Each proposal will be limited in length and judged as a demonstration of the Consultant’s capabilities and understanding of the project. Evaluation criteria, maximum points and page limitations (one page is considered to measure 8 1/2" x 11") will be as follows:

<table>
<thead>
<tr>
<th>Contents</th>
<th>Max. # Pages</th>
<th>Max. Points</th>
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</thead>
<tbody>
<tr>
<td>1. Introductory Letter</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>2. Minimum Qualifications</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>3. Project Team</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>4. Project Understanding</td>
<td>1</td>
<td>10</td>
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</table>
5. Project Approach

<table>
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<tr>
<th>5. Project Approach</th>
<th>4</th>
<th>30</th>
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</thead>
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6. Support Information
(public flyers, example engagement, resumes, etc.)

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<tr>
<th>6. Support Information</th>
<th>5</th>
<th>10</th>
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TOTAL

| TOTAL | 15 | 100 |

NOTE: Although the City will score all proposals numerically, the final point score will not be the sole basis for evaluation of the proposals. Additional qualitative criteria are described elsewhere in this RFP.

Selection
The Community Development Director has ultimate decision-making authority for the final selection.

Protests concerning the selection process must be delivered, in writing to the City of Oregon City Project Manager, within or not later than 7 days after selection or non-selection to the City of Oregon City Project Manager. The protest must state the grounds upon which it is based. The City of Oregon City will review the protest and present a decision to all involved parties within 45 calendar days. All documents shall become, and remain, the property of the City.

SECTION 7 - CONTRACT REQUIREMENTS

The successful Consultant shall enter into a Personal Services Agreement with the City (See Attachment 1). The Consultant must show proof of insurance (workers compensation, automobile) as required by the City’s Personal Services Agreement. Payment for contract services will be made monthly, upon receipt of the Consultant’s billing statement, for work done to date, unless the city and the consultant agree to another mutually agreeable reimbursement plan. The invoice shall include a summary of progress through the billing date and shall not be submitted more often than once per month. All billings will be processed through the City project manager.

ATTACHMENTS:

1. Personal Services Agreement - Standard Conditions
2. Project Scope of Work and Budget
3. Overall Comprehensive Plan Scope of Work and Budget