



**Willamette Falls Legacy Project
Cultural Landscape/Cultural Resource Report
Request for Proposal**

January 16, 2015



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SECTION 1 - PROCUREMENT INFORMATION

Procurement Schedule

Schedule of Events	Date
RFP Release	January 16, 2015
Deadline for Questions	February 2, 2015
Sealed Proposals Due to the City	February 4, 2015
Prescreen Of Proposals	February 5, 2015
Announcement of Successful Proposer	February 6, 2014
Anticipated Negotiation Schedule	February 6 –February-11, 2015
Anticipated Contract Execution	February 18, 2015

The City reserves the right to modify this schedule at the City's discretion. Notification of changes will be posted on the City website (www.orcity.org) or as otherwise stated herein. Inquiries shall be directed to Christina Robertson-Gardiner, Planner, the City project manager, by email (crobertson@orcity.org), phone (503-496-1564) or fax (503/722-3880). One (1) unbound copy of the proposal must be received at the City of Oregon City, Community Development Department, at the address below:

Fed Ex & Hand Delivery - Physical Address	US Post Office - Mailing Address
Oregon City Economic Development 625 Center Street Oregon City, OR, 97045	City of Oregon City Christina Robertson-Gardiner P.O. Box 3040 Oregon City, OR 97045

No later than 4:00 P.M. on February 4, 2015

Proposals received after this date will not be accepted. Faxed copies of bid proposals are not accepted. An electronic version of the submittal may be emailed to crobertson@orcity.org as a supplementary document. Arrangements can be made to upload the proposal through the city's FTP site.

The anticipated contract start date is February 19, 2015 with contract duration of approximately three years. The period of performance continues until the project deliverable schedule is complete. The selected Consultant shall assume responsibility for all contractual matters and services outlined in their proposal.

Hard Copy Submittal.

Submit one original (1) unbound, one (1) electronic copy of the response. Faxed and emailed copies will not be an alternative to the hard copy. Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your submission, you are to use fully 100% recycled stock.

Electronic Submittal.

The City allows and will accept an electronic submittal, in lieu of an official paper submittal.

- a. The electronic submittal is to be e-mailed to the Project Manager e-mail address (see page 2), on or before the deadline
- b. Title the e-mail very clearly with the RFP Title and your company name.
- c. Any risks associated are borne by the Proposer. The City will send a confirmation email if the submittal is received 24- hours before the deadline.
- d. The City e-mail system will generally allow documents up to, but no larger than, 8 megabytes.

All proposals become part of the public file for the project, without obligation to the City of Oregon City. The City reserves the right to reject any and all proposals for good cause, in the public interest, and is not liable for any costs incurred by the Consultant in the preparation or presentation of the proposal.

SECTION 2- PROJECT PERSONNEL

Christina Robertson-Gardiner, Planner for the City of Oregon City, will be the Project Manager for the City of Oregon City. Unless authorized by the Project Manager, no other City official or employee may speak for the City with respect to this solicitation. 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.

SECTION 3 - PROJECT BACKGROUND AND PURPOSE

The purpose of this Request for Proposal is to select a Consultant to complete a Cultural Resource/Cultural Landscape Report to assist the City of Oregon City, in cooperation with the project partners, to create a product that will allow the site to express its cultural history along with other goals for the site, which are outlined in the Willamette Falls Framework Plan.

Willamette Falls Legacy Project (www.rediscoverthefalls.com)

The Willamette Falls Legacy Project is a partnership between the site owner, the City of Oregon City, Metro, Clackamas County and the State of Oregon with the goal of transforming the 22-acre former Blue Heron mill site into a mixed use destination that embodies four core values:

Public access: Visitors will get a front-row seat to experience the majestic and truly extraordinary Willamette Falls. Cut off from public enjoyment and effectively removed from the public consciousness for more than 150 years, the falls are one of the most scenic places along the Willamette River.

Economic redevelopment: The Willamette Falls property will carry on a tradition of economic development along the riverfront, where mills thrived for more than a century. With the closure of the Blue Heron Paper Co., Oregon City lost 175 jobs – a loss that must be made up through redevelopment.

Habitat restoration: Historically, the falls were surrounded by unique plants because of microclimates from the mist. Protecting the site provides an opportunity to reestablish native plant communities, enhancing this ecologically diverse stretch of the upper reaches of the Willamette. This land is also critical for water quality – every fish and lamprey that travels the river passes through or around the falls.

Historic preservation and cultural interpretation: Future visitors will learn about the rich history of the Oregon City riverfront. Willamette Falls served as an important cultural site for native tribes and they tell the story of the area's industrial development – John McLoughlin built the Pacific Northwest's first lumber mill here. As the End of the Oregon Trail and the birthplace of Oregon, it served as a launching point for thousands of new Oregonians.

In cooperation with the new owners (Falls Legacy LLC), Willamette Falls Legacy Project partners (Oregon City, Metro, Clackamas County, and the State of Oregon) brought together thousands of Oregonians to help shape the future of Willamette Falls. This fall the framework planning and visioning process concluded and successfully rezoned the site to provide needed flexibility and certainty for a new generation of investors while reducing and removing barriers to redevelopment. The next step – and the centerpiece – of the project is a publicly accessible Willamette Falls Riverwalk providing visitors with up-close views of the majestic site in the heart of historic Oregon City, Oregon.

A Request for Proposal for a consultant team to provide a schematic design for the Riverwalk will be released in mid-January 2015. The chosen consultant for this project will be integrated into the larger schematic design process.

Purpose

The Cultural Resource/Cultural Landscape Report builds upon the work done to date and will provide a comprehensive look at the historic and cultural context of the Riverwalk site and adjacent mill property. As this site is so significant to the settlement and growth of Oregon, there is a wide range of primary and secondary documents associated with the site and to date, they have never been comprehensively indexed. The process of indexing resources will provide an incredible and long lasting benefit for the project. A primary aim is to bring historic institutions and academic leaders into the process, and through review, begin to identify compelling stories, missing information and holes in the understanding of the place. This will continue the champion building process and hopefully will spur discussions on potential parallel studies/projects associated with site themes which could be identified in the final Riverwalk interpretive plan.

The second product, the period plans, will provide the design team, and the public with a much better understanding of how the site has dynamically changed through the years and will be used, along with the rest of the report to help communicate the complexities of the site and explain specific decisions relating to the Riverwalk schematic design process.

This early work will be essential for the Riverwalk design as the draft report is scheduled to be completed just as the Riverwalk design process commences. This deliberate approach is intended to ensure that information on historic resources and interpretation is easily accessed and understood by the design team at the beginning of the process and is not rushed or put off to a later phase after the initial design work is completed. The Cultural Resource/Cultural Landscape Report will stay in draft form and is intended to be a working document for the design team and will be published when appropriate through the Riverwalk Design process.

The report is scoped to ensure Federal Section 106 requirements are met if and when federal monies are used for the construction of the Riverwalk. The cultural resource Consultant will also be a collaborative member of the Riverwalk design team and will help review and potentially contribute to the final interpretive plan for the Riverwalk.

The project will be broken into three phases. These dates are approximate and may shift to better align with the Riverwalk design and construction schedule. Phase 2 and Phase 3 will be further scoped with the chosen Riverwalk Consultant team in April and May 2015.

Scope Goals and Products

In preparation for the development of a master plan for the Willamette Falls Riverwalk, Oregon City wants to develop a better understanding of the site's history and cultural development. The primary focus of this Cultural Landscape/Cultural Resource Report will be the area addressed in the Willamette Falls Framework Plan, but will look beyond that at a contextual level as well to document historic and cultural events and development patterns that occurred within the Willamette Falls basin, which extends northwest to the Willamette Falls Canal and Locks,

southwest to the Willamette Falls and railroad spur, southeast to the bluff, and northeast to the Oregon City Arch Bridge.

The goals for this project include:

1. Review the historic materials that have been gathered to date which primarily focus on the historic buildings and social history, complete targeted research at various local and state archives and repositories and through online sources to fill knowledge gaps pertaining to the cultural landscape historical development, and identify any gaps that continue to persist, but are outside the scope and budget of this project to reasonably complete. **(Phase 1)**
2. Using the information gathered during the research phase, develop an illustrated chronology/site history that is rich with historic photographs and illustrations and is supplemented by historic era plans. The historic era plans will depict site elements (buildings, natural features, land use, vegetation, circulation, small-scale features, etc.) as they existed at a particular era in time which is evident through the historic materials that have been compiled, reviewed and analyzed. **(Phase 1)**
3. Present the information in a way that can be easily used and incorporated into future site design plans and interpretive components for Willamette Falls. **(Phase 1)**
4. Provide assistant to the chosen Riverwalk Consultant team through the schematic and construction drawing phases of the Riverwalk. This work will consist of attending meetings and providing review and potential contribute content for the interpretive plan, a deliverable of the Riverwalk Consultant team. **(Phase 2)**
5. Coordinate and assist city staff to submit all required Section 106 documentation required for construction permits. **(Phase 2 & 3)**
6. Provide guidance during the construction phase to ensure successful integration of cultural and historic interpretation plan and elements in the final design and construction documents. **(Phase 3)**

PROJECT PHASES

BUDGET

Phase1 (February 2015-July 2015)

Preliminary Cultural Resource/Cultural Landscape Report
Task Items 1.1-1.9

up to \$80,000

Phase 2 (July 2015-December 2016)

Provide assistant through the schematic and construction drawing phases of the Riverwalk. Review and potential contribute content for the interpretive plan, a deliverable of the Riverwalk Consultant team. Coordinate and assist city staff and Consultant team on issues relating to Section 106 documentation requirements.

up to \$50,000

Phase 3 (January 2017-December 2017)

Provide guidance during the construction phase. Coordinate and assist city staff to submit all required Section 106 documentation required for construction permits.

up to \$20,000

Total Budget up to \$150,000

SECTION 4 -DELIVERABLES

Phase1 (February 2015-July 2015)

Task 1.1: Research: Review Existing, Gather New, and Identify Gaps

Consultant will begin by reviewing the extensive research that has been completed to develop a deeper understanding of the cultural landscape’s evolution and start identifying gaps in the historical materials so that targeted new research can be completed through local and state repositories and national online sources. Consultant will develop a research plan, including a targeted list of repositories for review by Metro and Oregon City prior to completing extensive new research to ensure that the team is exploring fruitful new areas of research. Research will be completed through the identified and agreed upon sources and will be focused on uncovering information and images that help piece together the cultural landscape’s historic development. Oral interviews and general stakeholder outreach to key leaders within the academic and professional historic fields will be included in the final scope of this task. Metro and Oregon City will review the research plan and draft chronology/bibliography and develop a set of clear directions for moving forward with targeted research and providing any feedback on information that has been gathered to date in the chronology. Following receipt of the consolidated direction and comments, consultant will meet with Metro and Oregon City to finalize the Research Plan and to begin to discuss which historic eras will be depicted in the

historic era plans. Following receipt of the consolidated comments, consultant will meet with Metro and Oregon City to discuss and clarify any comments that require further elaboration. Oregon City has agreed to take meeting notes and distribute them to the team.

Task 1.1 Deliverables: *Research Plan and Draft Chronology and Bibliography (in Excel)*

Estimated Timeframe: *1 month*

Task 1.2: Develop Methodology and Report Outline

Consultant will develop a narrative that outlines the methodology used to complete the research, develop the cultural landscape chronology and historic era plans so there is clarity in terms of how the information was gathered and used to develop an understanding of the cultural landscape's evolution. This will include a section on how archaeological confidentiality issues were addressed as part of this effort. An outline of the report, with proposed historic eras outlined, will also be developed at this stage for review and comment. Metro and Oregon City will review the draft methodology and report outline and develop a consolidated set of juried comments, meaning that conflicts between reviewers will be addressed and clear direction for changes or edits will be provided to Consultant. No meeting is needed following the review of these deliverables.

Task 1.2 Deliverables: *Draft Methodology and Report Outline*

Estimated Timeframe: *2 weeks*

Task 1.3: Develop Illustrated Cultural Landscape Chronology

Narrative information, gathered through the research process, will be entered into a customized excel spreadsheet developed primarily for cultural landscape projects, which can be sorted by landscape characteristic, source and date. This tool is used primarily to develop the cultural landscape chronology, but can be used by future researchers, planners and designers involved with the site. Graphic information (historic images, maps, drawings, plans) will be scanned and organized by date and source. This task is completed alongside the research associated with Task 1.1.

Task 1.3 Deliverables: *See Task 1.5*

Estimated Timeframe for Tasks 1.3 -1.5: *2.5 - 3 months*

Task 1.4: Develop Historic Era Plans

Using the narrative and graphic information gathered during task 1.1 and 1.2, and a digital base plan provided by Metro (see below for more details), Consultant will develop up to four historic era plans for Willamette Falls that will depict the elements in place (buildings, natural features, land use, vegetation, small-scale features, circulation, etc.) at the end of each particular era. Consultant will work with Metro to determine which eras/dates to choose prior to developing the historic era plans. The illustrated cultural landscape chronology (see task 1.2) will be written to correspond to the eras which are depicted in the historic era plans. Metro will provide Consultant with a digital site plan (GIS, ACAD, and/or Illustrator) and recent high resolution aerial photograph to use as the base for developing the historic era plans. Consultant will supplement this with a half-day site walk that will focus on reviewing the extant site. The budget for this portion of the task assumes that the base map will require little to no clean-up or additional line work.

Task 1.4 Deliverables: *See Task 1.5*

Estimated Timeframe for Tasks 1.3 -1.5: *2.5 - 3 months*

Task 1.5: Draft Cultural Landscape Report

Consultant will develop a draft Cultural Landscape Report which serves as the compilation of elements developed in tasks 1.1 – 1.4. It will include an illustrated chronology focused on the cultural landscape’s evolution that is complemented by historic photographs, maps and illustrations that exemplify the site’s development and punctuated by historic era plans that tie the narrative and historic images together. Metro and Oregon City and other partners in the process will review the Draft Cultural Landscape Report and develop a consolidated set of juried comments, meaning that conflicts between reviewers will be addressed and clear direction for changes or edits will be provided to Consultant. Following receipt of the consolidated comments, Consultant will meet with Metro and Oregon City to discuss and clarify any comments that require further elaboration. Oregon City has agreed to take meeting notes and distribute them to the team. Consultant will incorporate comments and edits into a Final Draft Cultural Landscape Report.

Task 1.5 Deliverables: Revised Methodology, Draft Chronology that is supported by historic photographs, plans and graphics, Historic Era Plans

Estimated Timeframe for Tasks 1.3 -1.6: 2.5 - 3 months

Task 1.6 Case Studies and Preliminary Recommendations. This section of the report will look at compelling case studies and provide initial recommendations for treatment and interpretive guidelines for Riverwalk Schematic design process.

Task 1.6 Deliverables: This section may begin as an internal memorandum for the design team and later be revised for the final report.

Task 1.7 Final Draft Cultural Landscape Report

Following incorporation of the edits, Consultant will submit a Final Draft Cultural Landscape Report for review. Metro and Oregon City will review the Final Draft Cultural Landscape Report and develop a consolidated set of juried comments, meaning that conflicts between reviewers will be addressed and clear direction for changes or edits will be provided to Consultant. Following receipt and review of the consolidated comments, Consultant will meet with Metro and Oregon City to discuss and clarify any comments that require further elaboration. Oregon City has agreed to take meeting notes and distribute them to the team. Consultant will incorporate comments and edits into a Final Cultural Landscape Report.

Task 1.7 Deliverables: Final Draft Cultural Landscape Report

Estimated Timeframe: 1 month

Task 1.8 Final Cultural Landscape Report

Following incorporation of the edits, Consultant will submit a Final Cultural Landscape Report to Metro and Oregon City. The professionally produced report will be coordinated with the chosen Riverwalk schematic design team. A secondary poster plan or brochure will also be produced as part of this

Task 1.8 Deliverables: Final Cultural Landscape Report, Poster plan/brochure

Estimated Timeframe: 1 month

Task 1.9: Client Meetings and Coordination

Consultant will meet with Metro and Oregon City representatives on three occasions following major deliverables which correspond to decision points after completion of Tasks 1.1, Tasks 1.3-1.5, and Task 1.7, and have as-needed conference calls with the Metro project manager

during the project. This task includes contract set-up, scheduling and invoice review and approval.

Task 1.9 Deliverables: Meetings/Conference Calls, Project Schedule, and Monthly Invoices

Note for Deliverables: Please note that all deliverables will be sent to Oregon City digitally via email or ftp. There is no budget for printing deliverables.

Phase 2 (July 2015-December 2016)

Task Overview

Provide assistance through the schematic and construction drawing phases of the Riverwalk. Review and potentially contribute content for the interpretive plan, a deliverable of the Riverwalk Consultant team. Coordinate and assist city staff and Riverwalk Consultant team on issues relating to Section 106 documentation requirements. Task items for this scope will be refined with the chosen Consultant team in May 2015

Phase 3 (January 2016-December 2017)

Task Overview

Provide guidance during the construction phase. Coordinate and assist city staff to submit all required Section 106 documentation required for construction permits. Task items for this scope will be refined with the chosen Consultant team in May 2015 and at the beginning of the construction phase.

SECTION 5 - PROPOSAL FORMAT

Introductory Letter

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.

Minimum Qualifications

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 two (2) cultural landscape reports that include place specific period plans within the last five (5) years.
- Completed at least two cultural resource reports within the last five (5) years that include both place specific and ethnographic research.
- The individual chosen to oversee the project can meet the preservation professional standards as outlined in Appendix A of 36 CFR 61.

Project Team

This criterion relates to the project principal, the project manager, key staff and 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 On:

- Project principal experience on similar projects.
- Extent of principal involvement.
- Names of team members who will be performing the work on this project and their responsibilities.
- Identity of project manager and his/her experience on similar projects.
- Experience of key staff.
- Unique qualifications.

Project Understanding

Please describe your understanding of the project and what creative approaches you may have for meeting the Required Deliverables within the project time frame.

Project Approach

This criterion is the heart of the response and deals with the Consultant's ability to clearly define the action to be taken to deal with the objectives and problems outlined in the scope of work. It should include the proposed outline and schedule that indicate tasks, milestones, and staff assignments.

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.

Scope of Work

The City has provided background information, preliminary scope for Phase 1 and required deliverables. The Consultant's proposed scope of work will be evaluated based on this information to ensure that the required deliverables can be met within the time period identified.

Support Information

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.

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.

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 and project partners will evaluate proposals and decide on those people to be interviewed. A selection committee will evaluate applicants, rank the proposals, and make recommendations to the City within 11 days of the submittal date. 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.

Evaluation and Selection

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:

Contents	Max. # Pages	Max. Points
Introductory Letter	1	5
Firm's Capabilities	1	15
Project Team	2	30
Project Understanding	1	30
Project Approach	1	10
Budget Breakdown	1	0
Support Information	2	10
TOTAL	9	100

SECTION 7 - CONTRACT REQUIREMENTS

The successful Consultant shall enter into a Personal Services Agreement with the City (example attached). 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.

Protests concerning the selection process must be delivered, in writing to the City of Oregon City Project Manager, within or not later than 14 days after notification 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. The Consultant must show proof of insurance (workers compensation, automobile) as required by the City's Personal Services Agreement (see Attachment 1).

ATTACHMENTS:

- 1 - Personal Services Agreement
- 2- Preservation Standards and Qualifications