



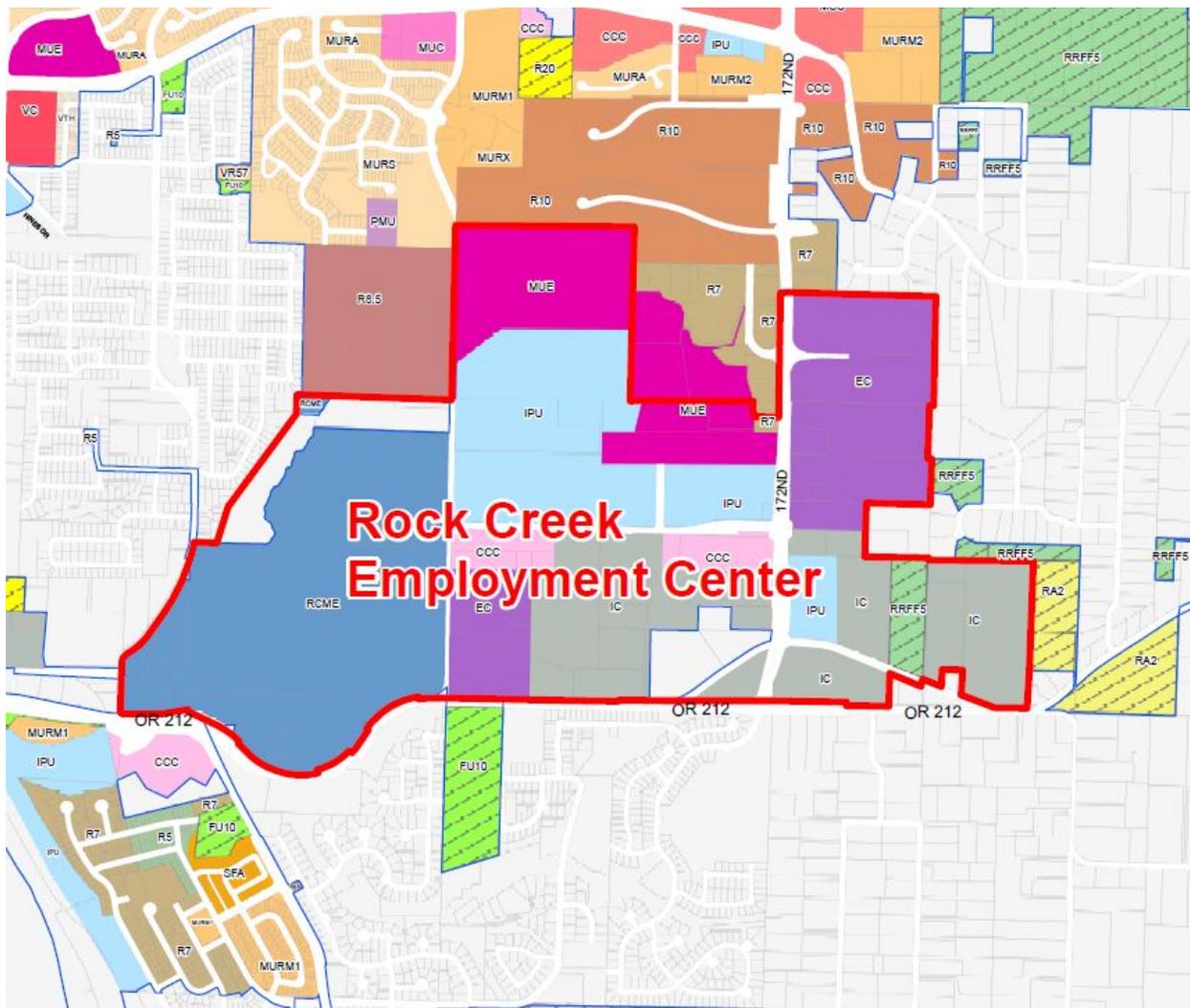
REQUEST FOR PROPOSAL (RFP)

METRO CONTRACT No. 935492

**ROCK CREEK EMPLOYMENT CENTER INFRASTRUCTURE
ASSESSMENT & FUNDING PLAN**

**CITY OF HAPPY VALLEY
ECONOMIC & COMMUNITY DEVELOPMENT DEPARTMENT
16000 SE MISTY DRIVE
HAPPY VALLEY, OR 97086**

JANUARY 2019



Introduction

The City of Happy Valley is presently accepting proposals from qualified firms for the development of the Rock Creek Employment Center Infrastructure Assessment and Funding Plan (“RCEC Assessment & Funding Plan”), The proposed project is intended to identify infrastructure solutions and potential funding options to attract economic development. The infrastructure solution package will act as a catalyst for job growth and economic development within the RCEC area by identifying a specific plan to serve the development sites and provide interim solutions to Hwy. 212 from the Rock Creek Intersection (Hwy. 212/224 “split”) to 172nd Avenue as it relates to the very long- term highway plan (Sunrise Corridor Phase II). It is evident in the current study of the employment sites that the characteristics of the RCEC are favorable for industrial and employment land development and suitable for jobs-based industry recruitment. The infrastructure and funding challenges that exist with the Sunrise Phase II Final Environmental Impact Statement (“FEIS”) combined with a lack of internal utility connection to the existing regional infrastructure impede the current ability of the RCEC

lands to attract the intended outcome. In addition, sanitary and storm sewer; domestic water; electricity; natural gas; and all other public-private utilities will be analyzed to determine critical components missing within the subject area. To accomplish this task, the City's Economic & Community Development Department is seeking to hire a consultant team to develop the RCEC Assessment & Funding Plan (see the Scope of Work for specific deliverables).

This project will identify near-term solutions for the transportation and utility constraints and will identify funding options for local infrastructure connections within the RCEC. These outcomes will establish a collaborative method for the City, County, State, private land owners and future industrial developers to participate in funding the needed infrastructure. The level of community readiness and local commitment to the predicted development outcomes has been demonstrated through the series of planning steps the City of Happy Valley has taken since the property was added to the Urban Growth Boundary (UGB) in 2002, as well as by the construction of a major arterial (172nd Avenue) from Hwy. 212 to Sunnyside Road and the development of the sanitary sewer main (Rock Creek Interceptor) to the immediate west of the subject area. The approximately 400 gross acres of land within the RCEC has adequate scale to generate a critical mass of activity by providing a significant number of potential development sites.

SECTION 1: Proposal Submittal and Closing Date

The proposal must be received by the Happy Valley Economic & Community Development Department by **5:00pm on Friday, March 1, 2019**. Electronic proposals are preferred. Proposals must be clear, succinct and **not exceed twenty (20) pages**. Section dividers, title page, table of contents, cover letter, and Supporting Information section do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered. If you choose to utilize paper copies, for purposes of review and in the interest of sustainable business practices, the City requests the use of submittal materials (i.e. paper, envelopes, etc.) that contain post-consumer recycled content and are readily recyclable. Submittals shall NOT include 3-ring binders or any plastic binding, folders, or indexing materials. Reusable binding posts, clips or rings and recycled content paper envelopes or folders are examples of acceptable bindings. Submittals shall be printed on both sides of a single sheet of paper wherever applicable. If sheets are printed on both sides, they are considered two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All electronic submittals will receive receipt of submission via email if received and accepted. Late proposals will not be considered and (if mailed) will be returned unopened to the sender.

Proposals should be addressed to:

Michael D. Walter, AICP
Economic & Community Development Director
16000 SE Misty Drive
Happy Valley, OR 97086
michaelw@happyvalleyor.gov, (503) 783-3839

SECTION 2: Inquiries

Questions that arise prior to the deadline must be submitted **seven days prior to the deadline** and must be addressed to the Project Manager listed above. As appropriate, questions and answers will be provided to all the RFP recipients. Protest of the contract award must be submitted within seven days of the contract award or issuance of intent to award, whichever is sooner.

SECTION 3: Scope of Work

Please refer to the attached “RCEC Assessment Plan – Scope of Work”

SECTION 4: Request for Proposal

Information that is required from the applicant as part of the proposal shall include:

1. Transmittal Letter

The Transmittal Letter must include the following:

- RFP number and Project title
- Full legal name of proposing business entity
- Name(s) of the person(s) authorized to represent the proposer in any negotiations
- Name(s) of the person(s) authorized to sign any contract that may result and a statement that the Proposal will be valid for 90 days.
- Contact person’s name, mailing or street addresses, phone and fax numbers and email address. **1-page limit.**

2. Project Team

Overall team description and organizational structure. **2-page limit.**

3. Project approach

The approach shall include the team’s statement of understanding of the project intent and requirements and shall describe the proposer’s approach to accomplishing the goals and deliverables of the project. **2-page limit.**

4. Statement of Work and products to be delivered

A clear written statement of the services to be performed, the form they will take and what the final products or deliverables will be. A concise outline delineating the specific tasks to be performed, indicating what will be done, in what sequence and by whom should be provided, including tasks to be performed by City and its service providers.

3-page limit.

5. Qualifications and Experience

Include firm information and resumes on each key person involved in the project with verifiable references as well as a description of the respondent's organizational framework, specific resources, and any other information to demonstrate that the respondent can effectively and efficiently provide the requested product. Include contact information for each firm's Project Manager. **6-page limit.**

Include one to three examples of similar projects that have been performed in the states of Oregon or Washington in the last five years. Resumes and past work examples may be included separately as part of the Supporting Information (see Section 9, below).

6. Cost proposal

The proposal shall provide an offer to undertake the project as proposed at a quoted cost. A rate schedule shall be provided in case of unanticipated change orders. The proposal should be clear in the specific tasks, hours, costs, schedule, and responsibilities (consultant vs. City staff) for each component and task in the Scope of Work. **1-2 page limit.**

7. Racial Equity and Diversity

Explain how well the 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, and/or
- Approaches to implement the work plan that engage underrepresented communities.

The use of COBID certified minority-owned businesses, woman-owned businesses, businesses that service disabled veterans own 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 underrepresented communities. **1-2 page limit.**

8. Project Timeline

A chart designed to illustrate the project schedule. **1-2 page limit.**

9. Supporting Information:

Resumes, brochures, previous work examples, etc. **No page limit.**

SECTION 5: Evaluation

The applicant's proposal and capabilities will be judged according to the following criteria:

1. Understanding the problem/plan (15pts)
The proposal will be evaluated based on the respondent's understanding of the nature of the project, chief issues, types of services necessary to accomplish the work, coordination issues and delivery of stated needs.
2. Project approach and Statement of Work (30 pts)
This response will be evaluated to assess the approach that will be applied to accomplish the objectives set forth in the statement of work. This statement of approach must clearly outline how the work will be completed. The project approach should emphasize the use of graphical tools/displays throughout the process.
3. Individual capabilities and experience with similar projects (30 pts)
The project will be evaluated based on the experience and skills of the applicant and/or staff as they relate to this project, capacity to perform required tasks and knowledge and experience with assessment and/or infrastructure plans in Oregon/Washington. The individuals/firms should demonstrate experience with graphical tools/displays and technical planning and engineering projects.
4. Racial Equity and Diversity (15 pts)
The proposal will be evaluated based on the extent to which racial equity and diversity have been incorporated into the consultant team and work plan, as detailed above in Section 4, item 7.
5. Project Timeline and Cost proposal (10 pts)
The proposal will be evaluated based upon the proposed project timeline/schedule and the specific tasks, hours, costs and responsibilities (consultant vs. City staff) for each component and task in the Scope of Work.

**City of Happy Valley
SCOPE OF WORK
ROCK CREEK EMPLOMENT CENTER INFRASTRUCTUE ASSESSMENT
AND FUNDING PLAN**

Project Description

The City of Happy Valley has invested 15+ years of effort planning for employment and job growth in the Rock Creek Employment Center (RCEC) and with this RFP, is currently seeking to reach the next level of planning efforts. These efforts will focus on the transportation and infrastructure requirements necessary to create “development ready” employment opportunities in the RCEC area.

In 2010-2011, the Regional Industrial Site Readiness Project identified two large lot industrial sites in the RCEC. To build upon this work, in 2012 the City of Happy Valley worked with Business Oregon, Clackamas County, and a consultant team to identify potential employment sites in the RCEC area to further evaluate and to identify barriers and constraints to implementing the regional development strategy within the RCEC. This project will build on the work currently underway by developing solutions to the infrastructure constraints for the RCEC area and developing cost and potential funding requirements for solutions. The project outcome will be a well defined infrastructure investment strategy and the identification of long term employment and tax benefits resulting from the investment in infrastructure.

The benefits of the project will have a strong positive impact on the Happy Valley Town Center Area, which is directly north of the RCEC, the 172nd/190th Corridor, and the Highway 212/224 Corridor. The preliminary scope of the project is to create an RCEC Infrastructure Funding Plan as the next step toward "development ready" sites in this approximately 200 buildable-acre Title 4 designated area. Metro has identified the majority of the land in the RCEC as Regionally Significant Industrial Lands and also Employment and Industrial lands. The RCEC Infrastructure Funding Plan will define critical infrastructure improvements, quantify costs as well as private share investment requirements, which will efficiently leverage public investment in order to add certainty for developers and attract private funds in the Rock Creek Employment Center.

Specific analysis to be included in the Infrastructure Funding Plan proposed under this grant application would be the capital costs for the extension of 162nd Ave. from the north end of Rock Creek (connection to the Happy Valley Town Center) south/southeast across Rock Creek; south to an intersection with Hwy. 212 (adjacent to approximately 70 acres owned by Providence Health Systems - Oregon); and, Highway 212 Improvements from 172nd Avenue traveling west to the Hwy. 212/224 intersection or "split", including intersection improvements at 162nd Avenue as well as the Hwy. 212/224 intersection itself. (see attached map). Further, once estimated project costs for development of the street system (to include public sewer and water) are established, the Infrastructure Funding Plan would identify the optimal mixture of finance mechanisms that would

maximize the public investment in infrastructure development to remove uncertainty for private investors which will enable private investment in the region.

Estimated RCEC Assessment & Funding Plan Start Date: **April 2019**

General Scope of Work Assumptions

The following Scope of Work outlines the City's minimum requirements for respondents to address in their proposals. The City is open to additional project components and methodologies that have proven successful in similar or related Assessment/Funding plan efforts. The proposal should be clear in the specific tasks, hours, costs, schedule, and responsibilities (consultant vs. City staff) for each component and task in the Scope of Work. Following the selection of a consultant team, the City expects for the lead consultant to meet with City staff and the Project Management Team (discussed in more detail in Scope of Work Item No. 1), to assist in finalizing scope and tasks; team roles; and, priorities.

The City is aiming to complete work (including adoption) of the RCEC Assessment & Funding Plan within 12 months of the start date. Per the Metro 2040 Grant, **the estimated budget is \$210,000** as well as significant in-kind services from City and City service provider staff members. Proposals should assume that the City's Project Manager or designee will be responsible for coordination and communication with the City Council and the project's Project Management Team (discussed further below), coordination of process/meeting logistics and support, and oversight of consultant team work. Consultant expertise is needed for:

- Project management
- Public infrastructure needs, preliminary survey/design and cost projections
- Funding mechanisms and implementation plans

Preliminary Scope of Work, Milestones, and Deliverables

Following is a high-level summary of the scope intended to carry out the Metro 2040 grant to develop the RCEC Assessment & Funding Plan. Proposals should expand on the team's approach and effort to achieve the tasks, milestones, and deliverables. Metro and the City are open to suggested changes in approach and timing, so long as the original goals and intent of the grant award are achieved within the budget provided. The City is seeking deliverables with a design and structure that will be easily accessible to the City website and easily understood by the community. The consultant team is expected to provide graphic design services for all final deliverables and provide said deliverables in an editable format. The consultant team will support the Project Manager in presenting draft materials to the PMT and City Council.

The proposal needs to be clear in identifying the consultant team's role on specific tasks and the cost/deliverables and timeline associated with those tasks:

- Consultant team identifies "10 percent" preliminary engineering plans for 162nd Ave./Hwy. 212 intersection; traffic capacity analysis at Rock Creek Interchange; and the costs associated with development of Rock Creek Employment Center (RCEC) transportation infrastructure per the City's TSP;
- Cost estimate of minimum 162nd Ave./Hwy. 212 signal; capacity adding mitigations at Rock Creek Interchange (if necessary, based on study) arterial road system;
- Cost estimate of sanitary/storm sewer in RCEC area;
- Cost estimate domestic water in RCEC area;
- Formation of Project Management Team (PMT) and presentation/review of 10% work;
- Consultant develops and details an itemized list of local funding mechanisms and potential matching fund opportunities including, but not limited to: Special Assessment Districts - including potential voter approved districts; System Development Charge (SDC) Overlays; Local Improvement Districts (LID's); Urban Renewal Districts; and, estimated private funding in conjunction with future development. The identified mix of funding would leverage regional investment and outcomes to yield the highest contribution to regional employment land needs;
- Identification and detailing of most realistic local funding opportunities;
- Local funding options detail and economic output resulting from investment (tax revenues, direct and indirect employment, etc.);
- Development of Summary Report and Action Plan;
- TSP evaluation/amendments (if necessary, by City staff); and
- Adoption of Resolution by City Council.

MILESTONE 1: Project Reconnaissance

Consultant team will attend a tour organized and led by the Project Manager of the project area and nearby East Happy Valley Comprehensive Plan (EHVCP) area. Consultant team shall evaluate relevant existing plans, physical and land ownership conditions, and regulatory framework and prepare a list of items for further evaluation.

Engineering/Funding Plan consultants will attend a City strategies overview meeting to understand the context of the City's Transportation System Plan (TSP); Metro Regional Transportation Plan (RTP); and, the Oregon State Highway Plan, and prepare a list of plans that are complete (for example, the East Happy Valley Comprehensive Plan); partially complete, or yet need to be started.

Consultant Deliverables - Milestone 1:

- a. Participate in site tour, City strategies overview meeting
- b. Evaluation of existing state of the area against the desired outcomes articulated in the RFP
- c. Evaluation of relevant existing plans to identify incomplete documents, regulatory concerns, and other items for further evaluation

MILESTONE 2: Project Management Plan, Project Timeline, and Identification of Roles

The consultant team will be responsible for the development of a project management and planning process plan timed and sequenced to allow for adequate analysis and opportunity for community input, City review of work products, and process for updating the City Manager's Office and City Council.

The City expects to create a Project Management Team (PMT) that will include staff from: City Economic & Community Development Department; City Manager's Office; Oregon Dept. of Transportation (ODOT); Clackamas County Business and Development; Clackamas County Water Environment Services (WES); Sunrise Water Authority (SWA); and, Metro project liaisons, and, the consultant team. Regularly scheduled meetings, primarily by phone and as frequently as monthly, will serve to keep the process moving, gauge process, and identify short-term tasks.

The City's Project Manager and PMT will assist the consultant team in the identification of and contact information for the diverse set of stakeholders in the Happy Valley community that should be involved in the development of the RCEC Assessment & Funding Plan. The City is committed to developing a project-specific website that incorporates a wide variety of social media platforms and engagement tools, which the City would host, develop and manage.

It is not anticipated that a Community Advisory Committee (CAC) will be necessary. Public involvement will include direct mailers to property owners in the RCEC area; newsletter articles, a dedicated page on the City's website and two Open Houses once the RCEC Assessment & Funding Plan is mature enough for public presentation.

Consultant Deliverables - Milestone 2:

- a. Detailed project management and planning process plan with timeline, roles and responsibilities, critical path dependencies, and technical tasks
- b. Charter for Project Management Team and PMT decisions incorporated into overall process
- c. Strategy that outlines a consensus-based decision-making process that includes efforts to connect with traditionally underrepresented communities, online and social media efforts, open house, committee meetings, community meetings or events, and other engagement efforts

MILESTONE 3: Transportation Infrastructure Assessment and Cost Estimates

Working with the PMT, the consultant will evaluate and analyze the information gained through the project reconnaissance task to identify the necessary transportation infrastructure needs and cost estimates.

The analysis will build off the efforts of the surrounding East Happy Valley Comprehensive Plan (EHVCP) adopted in 2009 and the City's TSP. Transportation studies/potential improvements to Highway 212 must be developed with the support of ODOT and the work is required to be coordinated with the processes and methods developed as part of Phase I of the Columbia to Clackamas Corridor (C2C) Plan effort funded by the State Transportation and Growth Management (TGM) Program.

Consultant Deliverables – Milestone 3:

- a. "10 percent" preliminary engineering plans (including cost estimates) for the extension of 162nd Ave. from the north end of Rock Creek (connection to the Happy Valley Town Center) south/southeast across Rock Creek, south to an intersection with Highway 212
- b. "10 percent" preliminary engineering plans (including cost estimates) for Highway 212 improvements from 172nd Avenue traveling west to the Highway 212/224 intersection or "split"
- c. "10 percent" preliminary engineering plans (including cost estimates) for intersection improvements at 162nd Avenue and the Highway 212/224 intersection itself

MILESTONE 4: Sanitary Sewer, Storm Water and Domestic Water Infrastructure Assessment and Cost Estimates

City and service provider staff will provide sanitary sewer, storm sewer and water plans or pertinent information to devise infrastructure and cost assessments. Respondents are encouraged to outline in their proposals a coordinated process to develop these technical documents - timing, sequencing, and integration with community engagement and decision-making processes.

Consultant Deliverables – Milestone 4:

- a. "10 percent" preliminary engineering plans for sanitary sewer, storm water and domestic water services
- b. Cost estimates for sanitary sewer, storm water and domestic water services

MILESTONE 5: Infrastructure Funding Opportunities

Based on the results of the infrastructure assessments and cost estimating for transportation, sanitary sewer, storm water and domestic water, an itemized list of local funding mechanisms and potential matching fund opportunities shall be developed. The identified mix of funding will be used to leverage regional investments. Potential mechanisms include Special Assessment Districts, System Development Charge Overlays, Local Improvement Districts, Urban Renewal Districts and private funding from future development. This will result in an action plan for a collaborative approach for the City, County, State, private land owners and future industrial developers to participate in funding the needed infrastructure.

Consultant Deliverables – Milestone 5:

- a. Summary Infrastructure Funding Report and Action Plan

MILESTONE 6: Final Report and Findings

Development of a final report identifying infrastructure needs, potential local funding opportunities and amendments to the City’s Transportation System Plan (TSP) and infrastructure master plans as needed.

Consultant Deliverables – Milestone 6:

- a. Final report for presentation to City Council
- b. Code language/findings for TSP and master plan amendments as needed.

Appendices:

A. 2018 Metro 2040 CP&D Grant Application - RCEC Assessment & Funding Plan Project Narrative - www.happyvalleyor.gov/wp-content/uploads/2018/12/RCEC-Project-Narrative.pdf

B. East Happy Valley Comprehensive Plan (2009) - www.happyvalleyor.gov/wp-content/uploads/2018/10/East-Happy-Valley-Comp-Plan-Current-Zoning-October-2018.pdf

C. City TSP (2017) - www.happyvalleyor.gov/wp-content/uploads/2017/12/Happy-Valley-TSP-Adopted-12-5-17.pdf

D. RCEC Economic Opportunity Analysis (2011) - www.happyvalleyor.gov/wp-content/uploads/2018/12/Happy-Valley-Final-EOA-May-v6.pdf

E. RCEC area Composite Industrial Land Profiles (2018) - www.dropbox.com/s/ip6nqewwhj9d5in/RCEC%20Composite%20Profile%2020021418.pdf?dl=0