



A&E “Related Services”

MINI-RFP #34941/“Requisition Number” REQ-73000-00016283

for

Work Order Contract (“WOC”) Assignment Under Price Agreement (“PA”) series B36376 and B36380 through B36383 (Land Use).

NOTE: Only Consultants that have been awarded a PA in the above PA series may respond to this Mini-RFP.

Project Name: Highway 99 and Bear Creek Greenway Corridor Re-visioning

Project Location: City of Talent, City of Phoenix and Jackson County

DBE Participation Goal: 3% (see section 1.5.1 for more information)

PROPOSAL SUBMISSION DEADLINE: See “Bid Ending Date” and time for this Mini-RFP in OregonBuys.

Buyer/Single Point of Contact: See “Buyer” for this Mini-RFP in OregonBuys.

Section 0. OREGONBUYS

This Mini-RFP is advertised in [OregonBuys](#) as an Informal Quote, which is open only to registered vendors that have an existing PA with ODOT for the needed Services.

0.1 INFORMATION and ATTACHMENTS INCORPORATED FROM OREGONBUYS

In addition to the provisions set forth and linked within the Mini-RFP, the Mini-RFP incorporates by this reference the information published on the [OregonBuys](#) Informal Quote page for this Mini-RFP, including but not limited to:

- The Bid Ending Date and time specified under the Active Informal Quotes section;
- The Buyer name and contact information specified in the Header Information section;
- Any documents, forms, or other files linked in the Informal Quote Attachments section.

0.2 CROSSWALK of TERMS used in OREGONBUYS

Terms used in OregonBuys	Definition
Bid Ending Date	“Closing” as defined in OAR 137-046-0110(5). In OregonBuys it is the deadline for submitting Quotes (Bids, Proposals or other required responses) required for an Informal Quote.
Change Order	A formal change to an existing MBPO (i.e., any form of contract; agreement; price agreement or on-call contract, etc.; purchase order; or WOC).
Master Blanket Purchase Order (“MBPO”)	Any form of contract, agreement (i.e. price agreement, on-call contract, etc.), purchase order or WOC.
Quote	Any form of offer submission by vendors; i.e., Bids, Technical Proposals, Price Proposals, or any other type of offer required by a Bid Solicitation.
Vendor	Any form of business entity registered in OregonBuys. Only registered vendors are eligible to submit a Quote and enter Purchase Orders, MBPOs, or Release Requisitions pursuant to Bid Solicitations advertised in OregonBuys.

Section 1.0 SOLICITATION INFORMATION AND REQUIREMENTS

1.1 SUMMARY OVERVIEW and WORK ORDER CONTRACT (WOC”) OBJECTIVES

Problem Statement

In early September, the Almeda Fire began in northern Ashland and moved north up the Highway 99 and Bear Creek corridor through the cities of Talent and Phoenix, as well as unincorporated Jackson County. Altogether, the fire destroyed approximately 2,500 residential properties, including approximately 1,500 manufactured homes in 18 mobile home parks and approximately 180 commercial properties. Southern Oregon suffers from a substantial lack of housing affordable to local residents. This affordability problem has been exacerbated by the Almeda Fire. The vegetation along the Bear Creek Greenway, a 20-mile, paved, multi-use trail that links the cities of Ashland, Talent, Phoenix, Medford, and Central Point, suffered major damage as well. A significant portion of the destroyed housing, especially manufactured housing, was located in the Bear Creek floodplain or

floodway. This will impact redevelopment options and, potentially, the affordability of replacement housing.

Prior to the Alameda Fire, development of land adjacent to the Highway 99 corridor consisted of a mix of uses including commercial, industrial, and low- to high-density residential. However, the development was largely inefficient, automobile-oriented, and lacked identity and place-making elements. Furthermore, significant portions of Highway 99 lack adequate facilities and are unsafe and uncomfortable for people traveling on foot or by bike, including a large number of traditionally underserved residents living near the Highway throughout this corridor.

Project Description

The purpose of the Highway 99 and Bear Creek Greenway Corridor Re-visioning (“Project”) is to engage the communities along Highway 99 and the Bear Creek Greenway, including Cities of Talent and Phoenix and Jackson County, in a visioning and planning process. The intended outcome of the process is to create a plan and development code language for redeveloping the land adjacent to the transportation corridor in a manner that supports multi-modal transportation, with a particular emphasis on walking and biking, and multi-use hubs or nodes that improve destination accessibility and reduce the need for motor vehicle travel. The Project consists of two principal parts.

1) A visioning and strategic planning process to:

- a. Identify projects to enhance opportunities for people to walk, bike, and use transit, including access to transit routes. This will require a review of existing plans in place by ODOT and the local jurisdictions, and interviews with the cities and residents to develop a list of potential feasible projects. Changes to the number of travel lanes will not be considered as part of this project.
- b. Recognize the opportunities and challenges of the post-fire landscape, which has resulted in conditions that are different from those on which existing plans and regulations are based.
- c. Evaluate increased housing opportunities and types (especially affordable housing types) through mixed-use (vertical and horizontal) nodal commercial/residential development along Highway 99, including a review of opportunities and constraints for zoning districts along the corridor,
- d. Develop design elements and other suggestions for placemaking for the City of Talent and the City of Phoenix, including green infrastructure strategies to mitigate flooding and improve multi-modal transportation.

2) A final report with recommendations for design concepts, adoption-ready comprehensive plan language (goals and policies), and adoption-ready zoning code amendments for each of the three participating local governments, including:

- a. Recommendations to implement the goals and vision identified in the visioning and strategic planning process (1, above);
- b. Recommendations to increase safety, visibility, and connectedness to the Bear Creek Greenway. This includes a review of current issues (safety, homelessness, gaps in connections, etc.), a list of improvements and policies to address those issues, and trail-oriented development; and
- c. Comprehensive plan and development code amendments (including graphics) for increased housing, including affordable housing, and mixed-use options in the Project area.

Oregon Department of Transportation (“Agency” or “ODOT”) is requesting supplemental information regarding specific A&E and Related Services experience relevant to the above referenced (the

“Project”). The needed Services are further described in the attached Statement of Work (SOW). The expected outcome of the WOC is to create a vision and implementing regulations to redevelop the land uses in the Project Area in a manner that supports multi-modal transportation (with an emphasis on walking, biking, and transit) and multi-use hubs that improve destination accessibility and reduce the need for transportation. Proposers responding to the Mini-RFP do so solely at their expense. Agency is not responsible for any Proposer expenses associated with the Mini-RFP.

The selected Proposer and Agency will negotiate the delivery schedule, costs and final Statement of Work, within the scope of what is advertised here, for inclusion in the final WOC.

The WOC is anticipated to start fall 2021, and is expected to be completed by spring 2023. Pending successful negotiations, the selected Proposer shall perform its obligations according to the WOC and applicable terms and conditions of the parent PA and exhibits thereto.

Funding Source(s):

This project is partially funded by a grant from the Transportation and Growth Management (“TGM”) Program, a joint program of the Oregon Department of Transportation and the Oregon Department of Land Conservation and Development. This TGM grant is financed, in part, by federal Fixing America’s Surface Transportation Act (“FAST Act”), local government, and State of Oregon funds.

WOC Payment. Payment will be made for completion of tasks and deliverables in conformance with PA requirements and all applicable standards. The method of compensation will be Fixed Price per Deliverable.

For further information see PA, Exhibit B “Compensation”.

WOC Phases. The contracted Services will be a phased development as follows:

- Phase I – visioning and strategic planning
- Phase II – design concepts, and comprehensive plan and zoning code amendments. Agency is not obligated to proceed with final design for any alternative; all reasonable alternatives will be evaluated and given appropriate consideration.

Following completion of Phase I, Agency may, at its discretion:

- Amend this WOC to add Phase II tasks – or
- Elect to complete Phase II tasks with in-house staff, or
- Assign Phase II tasks to another consulting firm.

Agency and Consultant shall negotiate the detailed tasks, deliverables, schedule, and costs for each phase Agency elects to add. Each added phase will be authorized only by written WOC amendment with all required approvals and signatures.

Offer Period: A Proposer's Proposal is a firm offer, irrevocable, valid and binding on the Proposer for not less than 180 days following the closing date for this Mini-RFP. Agency may request, either orally or in writing, that Proposer extend the offer period in writing.

Contingent upon Agency need and available funding, Agency may (for up to 9 months following the close of this Mini-RFP), in Agency’s sole discretion, make additional award(s). Agency may select the next ranked responsible Proposer who has submitted a responsive proposal (provided Proposer agrees to an extended offer period, which would cover the balance of the 9 months, if at that time

the offer period stated in the paragraph above has expired or soon will expire), issue an intent to award. If agreement with that Proposer is not reached **within 60 days**, Agency may offer award to the next ranked Proposer and so on until agreement is reached or until Agency terminates the process. Agency reserves the right to require confirmation of the qualifications of any Proposer.

1.2 QUESTIONS and CLARIFICATIONS

1.2.1 PROPOSER QUESTIONS & AGENCY RESPONSES

The “Buyer” identified in OregonBuys for this Mini-RFP is the Agency’s Single Point of Contact for this solicitation. All inquiries regarding this procurement, whether relating to the Mini-RFP process, administration, deadline or award, potential COI issues, or to the intent or technical aspects of the Services must be submitted in writing via e-mail to the Buyer. **Failing to follow the foregoing requirements regarding the Buyer/Single Point of Contact for inquiries may result in Proposal rejection by Agency.**

All questions must be received not later than 5 business days prior to the Proposal submission deadline.

Question and Answer documents, if any, will be posted on OregonBuys (in the Informal Quote Attachments section for this Mini-RFP) to respond to inquiries that Agency determines, in its sole discretion, do not effect changes to this Mini-RFP. Question and Answer documents provide clarifications and interpretations but do not change Mini-RFP requirements.

1.2.2 ADDENDA

Answers to questions Agency receives and that Agency, in its sole discretion, determines are substantive and provide new information, will be issued as official Addenda to this Mini-RFP. When appropriate, as determined by Agency in its sole discretion, revisions, substitutions, or clarifications of the Mini-RFP will be issued as Addenda to this Mini-RFP. Changes or modifications to this Mini-RFP will be binding on Agency only if in the form of written Addenda issued by the Agency. Any Addenda to this Mini-RFP will be published on OregonBuys in the Informal Quote Attachments section for this Mini-RFP.

1.3 PUBLIC RECORDS

After the evaluation/selection and negotiation process is complete, Proposals will be open to public inspection in accordance with ORS 279C.107. If a Proposal contains any information that may be considered exempt from disclosure under the various grounds specified in Oregon Public Records Law, ORS 192.311 through 192.478, the Proposer must clearly designate the portions of its Proposal that Proposer claims are exempt from disclosure, along with a justification and citation to the authority relied upon. Application of the Oregon Public Records Law shall determine whether any information is actually exempt from disclosure. **Identifying the Proposal in whole as exempt from disclosure is not acceptable.** If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure and the authority used to substantiate that claim, Proposer is deemed to waive any future claim for non-disclosure of that information.

1.4 PROPOSAL and SUBMISSION REQUIREMENTS (“PASS/FAIL” & “REQUIRED” ITEMS)

1.4.1 PASS/FAIL:

- Items in Section 1.4 marked as “**PASS/FAIL**” that are incomplete (except for minor informalities), not submitted by Proposal due date and time, or are otherwise not in substantial conformance with the requirement, will be rejected as non-responsive. Proposals must comply with ALL requirements marked as “**PASS/FAIL**” to be considered for further evaluation.

1.4.2 RESERVED:

1.4.3 PROPOSAL

The Proposal must describe how Proposer meets the requirements that are specified in this Mini-RFP as related to the scoring criteria below. Be clear and concise.

1.4.4 RESERVED

1.4.5 PROPOSAL COVER SHEET (REQUIRED)

The Proposal must include a completed Proposal Cover Sheet using the form attached below as an electronic file, with the “APPROVED” checkbox marked to certify approval.



1.4.6 PROPOSAL SUBMISSION DEADLINE (PASS/FAIL)

Agency will not accept Proposals submitted after the Proposal submission deadline, which is specified as the Bid Ending Date and time for this Mini-RFP in OregonBuys. .

1.4.7 SUBMITTAL FILE SIZE and REQUIRED FORMS (REQUIRED)

The total combined size of all files for Proposal, Coversheet and any forms must not exceed 5 megabytes.

- **(REQUIRED)** Key Staff Resumes form (using Agency form and minimum 11-point font). Key Staff Resumes form is, available at:
<https://www.oregon.gov/ODOT/Business/Procurement/Pages/PSK.aspx>

1.4.8 SUBMITTAL VIA OREGONBUYS

All required submittals must be submitted via OregonBuys (submittals by any other means will be rejected).

When submitting a Proposal (“Quote”) in response to this Mini-RFP:

- Do not enter pricing or any other information in the Item Information section.
- Select the “Confidential” checkbox on the Create Quote page when uploading Proposal and any other files (“Quote”).

1.4.9 FORMAT FOR PROPOSAL AND PAGE LENGTH LIMITATION

The Proposal must be organized and submitted in accordance with the table below and including any limitations in the applicable sections. **If a Proposer submits a Proposal exceeding the page limits, Agency will consider the pages up to the allowable page limit and discard all subsequent pages.**

Proposal Components	Section	Maximum Number of Pages	Submission
Mini-RFP Cover Sheet	1.4.5	1	Single combined pdf file
Key Staff Resumes	2.2.1	4	
Project Approach and Project Samples	2.2.2 and 2.2.3	3	
Work Samples	2.2.3	3	
Conflict of Interest	1.4.1	N/A	Separate pdf file

The Proposal must be organized in accordance with the list of Scoring Criteria categories in Section 2.2. **The Proposal must not exceed 3 pages, excluding Proposal Cover Sheet, any tabs or indexes, table of contents, “Key Staff Resumes” (including any limitations, in Section 2.2), and Work Samples. If a Proposer submits a Proposal exceeding this limit, Agency will consider the pages up to the allowable page limit and discard all subsequent pages.** The Proposer may choose how to allocate the number of pages between any sections, within the overall page limit.

One Page is defined as: one side of a single 8-1/2" x 11" page, with 12-point minimum font size for the substantive text (including text in tables) and 11-point minimum font size for resumes or Key Staff Resume form. Any page over this size will be counted as 2 pages. Any page, or partial page, tabs, indexes or table of contents with substantive text, tables, graphics, charts, resumes, etc., will be counted as 1 page.

- **The Proposal Cover Sheet, Proposal, and Key Staff Resumes must be submitted as a single combined pdf file.**
- **Conflict of Interest (“COI”) information (see Attachment A, Coversheet) must be submitted as a separate pdf file.**

(REQUIRED) Proposals must use 12-point minimum font size for the substantive text in Proposals (including text in tables). “Key Staff Resumes” (if required) or other resume formats (if required) must use an 11-point minimum font. Proposers may use their discretion for the font size of other materials that do not include substantive text (e.g. headings, graphics, picture or graphics captions, and org charts). If hard copies are required, Proposers are to submit Proposals on recycled white paper (stapled only), without binders or cover-stock. If a Proposer submits a Proposal with cover-stock or binding, Agency will remove and recycle them.

1.4.10 TERMS AND CONDITIONS (PASS/FAIL)

Unless otherwise provided in this Mini-RFP, by submitting a Statement of Proposal (SOP), each Proposer agrees to be bound by and comply with the terms and conditions of the Proposer's existing PA, as amended. Any SOP that is conditioned on Agency's acceptance of terms and conditions other than those set forth in the existing PA and the requirements specified in this Mini-RFP (as they may be revised by an addendum to this Mini-RFP) will be rejected as non-responsive.

1.4.11 OTHER MINIMUM REQUIREMENTS (REQUIRED)

Proposer must clearly indicate on Attachment A - Proposal Cover Sheet how they meet each of the minimum requirements listed in this Section 1.4.11.

List all subconsultant firms that, if selected, will be utilized on Proposer's team for this project.

1.5 DBEs and Certified Small Businesses

1.5.1 DISADVANTAGED BUSINESS ENTERPRISE (DBE)

The WOC will include Federal funding:

- **A DBE participation goal, as set forth on page 1**, has been assigned for the prospective WOC. This goal will apply to the overall WOC including amendments. If a given phase of the WOC (such as CA-CEI, if applicable) will include little or no opportunity for DBEs, then DBE utilization in other phases of the WOC will need to be sufficient to meet the overall WOC goal. Exceptions for a given WOC or amendment will need to be assessed by Agency on a case-by-case basis.

See PA Exhibit E:

- information on reporting requirements and how credit toward meeting an assigned DBE participation is determined (for goal and no-goal WOCs), and
- further explanation and description of the DBE program.

1.5.2 CERTIFIED SMALL BUSINESS ASPIRATIONAL TARGETS

A standard 12% Certified Small Business Aspirational Target will be assigned if the WOC does not include federal funding and it is likely to exceed \$100,000 (including amendments for future phases). See PA [Exhibit K](#) for additional information.

Section 2.0 PROPOSAL EVALUATION & CONSULTANT SELECTION

2.1 EVALUATION PROCESS

2.1.1 EVALUATION

Agency will evaluate Proposals in accordance with the Pass/Fail criteria identified in Section 1.4. Proposals meeting those criteria will be forwarded to an evaluation committee of at least 3 members that will independently review, score and rank Proposals according to the Scoring Criteria set forth in Section 2.2.

The outcome of the Evaluation process may, at the Agency's sole discretion, result in:

- (a) notice to Proposer(s) of selection or rejection for WOC negotiation and possible award;
- (b) further steps to gather additional information for evaluation, (e.g. checking references, notice of placement on an interview list, requesting clarification); or
- (c) cancellation of the Mini-RFP and either re-issuance of the Mini-RFP in the same or revised form or no further action by Agency with respect to the Mini-RFP.

Agency reserves the right to reject any or all Proposals and reserves the right to cancel this Mini-RFP at any time if doing either would be in the public interest as determined by Agency. Agency is not liable for any costs a Proposer incurs while preparing or presenting the Proposal or during further evaluation stages. All unreturned Proposals will become property of Agency and part of the public file without obligation to Agency.

2.1.2 INTERVIEWS/FOLLOW-UP QUESTIONS

Agency may conduct interviews/follow-up questions. If interviews/follow-up questions are conducted, the following will apply:

- The number of Proposers selected for interviews/follow-up questions is at the sole discretion of Agency.
- A minimum of 3 evaluators shall score the interviews/follow-up questions;
- Interview/follow-up question scores (up to a maximum of 25 points) will be combined with the other criteria scores to arrive at a total score. The total score will be ranked to determine the apparent successful Proposer.
- Interviews normally require physical attendance at Agency's offices; however, Agency may elect to conduct interviews via teleconference or video conference. Further details will be included with notification of time and date of interviews, if conducted.
- Evaluation and scoring will be based on one or more of the following criteria:
 - Understanding of Requested Services
 - Technical Approach
 - Project Management/Cost Effectiveness
 - Proposer's General Qualifications
 - Proposer's Capabilities
 - Proposer's Relevant Experience
 - Project Team and Qualifications

2.1.3 RESERVED

2.1.4 AGENCY QUESTIONS

Agency may require any clarification it needs to understand the Proposer's Proposal. Any necessary clarifications or modifications which are in the best interest of the Agency may be made before the Proposer is awarded a WOC, and some or all of the clarifications or modifications may become part of the final WOC.

2.1.5 METHOD OF AWARD

The scores for Proposer ranking and tentative award will be determined as follows:

Evaluators will assign a rank for each Scoring Criteria and interview/follow up question (if conducted). Ranking will be the best response to the Scoring Criteria or interview/follow up question will receive a rank of #1, the second best will receive a rank of #2 and so on.

The ranking will correlate with a percentage of the points available for each Scoring Criteria depending on the number of proposals.

Example: 3 proposals are received

A ranking of #1 will receive 100% of the points available per Scoring Criteria

A ranking of #2 will receive 66% of the points available per Scoring Criteria

A ranking of #3 will receive 33% of the points available per Scoring Criteria

Example 5 proposals are received:

A ranking of #1 will receive 100% of the points available per Scoring Criteria

A ranking of #2 will receive 80% of the points available per Scoring Criteria

A ranking of #3 will receive 60% of the points available per Scoring Criteria

A ranking of #4 will receive 40% of the points available per Scoring Criteria

A ranking of #5 will receive 20% of the points available per Scoring Criteria

If a Proposer does not respond to a Scoring Criteria the Proposer will receive a 0 rank for that Scoring Criteria.

The SPC will convert the ranking of each Scoring Criteria to the percentage of the points awarded for the ranking. The total score and selection for tentative WOC assignment will be determined as follows:

- Total Proposal Score = Total of all points awarded per ranking for a given Proposal, divided by the number of evaluators.
- Total Interview or Follow-up Questions Score (if conducted) = Total of all evaluator points awarded per ranking for a given Proposer, divided by the number of evaluators.
- **Final Score** = Total Proposal Score plus Total Interview or Follow-up Questions Score (if conducted).

Agency will negotiate the payment amount and methodology with the top ranked Proposer (based on Final Scores). If negotiations are not successful, Agency may terminate negotiations with the top ranked

Proposer and may begin negotiations with the next highest ranked Proposer and so on, until successful negotiations are completed or Agency determines that cancellation of this Mini-RFP is in the best interest of the State.

2.2 SCORING CRITERIA

Proposal scoring will be based on the criteria stated in the subsections below.

	<u>Evaluation & Scoring Criteria</u>	Max Points
2.2.1	<p><u>Specific Experience of Key Staff</u></p> <p>Complete a “Key Staff Resumes” form available at: http://www.oregon.gov/ODOT/Business/Procurement/Pages/PSK.aspx</p> <p>Provide information for the proposed Project Manager and proposed key staff for the following disciplines:</p> <ol style="list-style-type: none"> 1. Developing streetscape improvement and public spaces (“place making”) (5 points) 2. Multi-modal transportation and land use planning to improve destination accessibility (5 points) 3. Public engagement techniques that emphasize environmental justice; equity; and participation by people who lack formal organization or influence, have limited English proficiency, and have been displaced from their homes (5 points) 4. Writing development codes that promote walking, biking, and transit (5 points) <p>Scoring will be based on relevance of the experience, qualifications, and technical competence of Project Manager and key staff proposed for use on this specific project.</p> <p>The fields on the Key Staff Resumes form may be expanded, but may not exceed 1 page per resume and must use a minimum of 11 point font for substantive text.</p>	20
2.2.2	<p><u>Project Approach</u></p> <p>Given the information provided with this solicitation, describe your approach for the prospective project to cost effectively meet the Agency’s deliverables/objectives in the timeline needed. In addition, describe your approach to creating an inclusive and equitable public involvement strategy as stipulated in the "Public Involvement Approach" section of Part C and in Task 2 of the SOW</p> <p><u>Scoring will be based on a) relevance of the recommendations to the project and community and b) how the recommendations will advance the Project Purpose and Project Objectives and lead to adoption and implementation.</u></p>	45

2.2.3	<p>Work Samples</p> <p>Provide actual pages demonstrating the Consultant’s ability to communicate key information and inform decisions from one or more projects of similar scope and magnitude. Pages should be marked only to call out a specific section (circle or highlight a particular area of a page). The projects must be those performed by the team’s Project Manager and Key Staff in the same roles.</p> <p>The Work Samples will be scored by evaluators on applicability to Project as well as format including appropriate use of tables and graphics; clear, concise text; and errors, including misspellings, grammatical, and typographic.</p>	25
2.2.4	<p><u>Clarity and Responsiveness of Proposal</u></p> <p>Proposers should not provide a written response to the criterion.</p> <p>SOP will be scored by evaluators on format including appropriate use of tables and graphics; ease of finding clear, concise responses that correlate with the order of evaluation criteria in the Mini-RFP; errors, including misspellings, grammatical, and typographic; and Proposers ability to follow instructions.</p>	10

Proposal Score Summary	
Total Maximum Points for Proposal	100
Maximum Points for Interviews/Follow-up Questions (if conducted)	25
Maximum Possible Total Score	125

2.3 AWARD REQUIREMENTS

2.3.1 COST DATA

Following development of the Statement of Work, the selected Proposer shall submit a detailed Breakdown of Costs ([BOC](#), [BOC NBR](#), or [BOC-CPFF](#), as applicable) with cost information as required in the WOC Assignment and Requirements Exhibit of the PA.

2.3.2 COMMITTED DBE BREAKDOWN & CERTIFICATION FORM-AE

During negotiations of the WOC, Consultant shall submit a **Committed DBE Breakdown and Certification Form-AE** (one for each DBE subcontractor that will be utilized) if a DBE goal greater than 0% is assigned to the WOC. **[Note:** The Committed DBE Breakdown and Certification Form-AE will not be required for WOCs with no goal assignment or if a DBE goal is not required (i.e., if WOC includes no federal funding)]. The Committed DBE Breakdown and Certification Form-AE must be submitted

and approved prior to WOC execution and shall be used to determine Consultant’s responsiveness to the DBE requirements. See PA **Exhibit E**, DISADVANTAGED BUSINESS ENTERPRISE (DBE) PROVISIONS for detailed requirements.

The Committed DBE Breakdown and Certification Form-AE is available at:

<https://www.oregon.gov/ODOT/Business/OCR/Pages/Forms.aspx>.

2.3.3 PROPOSER RESPONSIBILITY, DEBT OWED to STATE

Agency may reject an offer and rescind the Intent to Award notice if Agency determines Proposer is not responsible or if Proposer has liquidated and delinquent debt owed to the State or any department or agency of the State.

2.3.4 RESERVED

2.3.5 RESERVED

SECTION 3.0 STATEMENT OF WORK (or) SUMMARY of TASKS, DELIVERABLES & SCHEDULE

**STATEMENT OF WORK and DELIVERY SCHEDULE
TGM C1A2-2
Highway 99 and Bear Creek Greenway Corridor Re-visioning**

Initials & Definitions:

Agency/ODOT – Oregon Department of Transportation

APM – Agency Project Manager

CAC – Citizen Advisory Committee

DLCD - Department of Land Conservation and Development

IAP2 – International Association for Public Participation

Local Jurisdictions – City of Phoenix, City of Talent, Jackson County

Local Jurisdiction Leaders -- Planning Commissions and City Councils or County Board of Commissioners of each Local Jurisdiction

PAC – Project Advisory Committee

PIP – Public Involvement Plan

PMT – Project Management Team

Project - Highway 99 and Bear Creek Greenway Corridor Re-visioning

SOW – Statement of Work

TGM - Transportation and Growth Management

TPR – Transportation Planning Rules (Oregon Administrative Rules 660-012-0000)

B. PROJECT DESCRIPTION and OVERVIEW of SERVICES

Project Purpose and Transportation Relationships and Benefits

The purpose of the Highway 99 and Bear Creek Greenway Corridor Re-visioning (“Project”) is to engage the communities along Highway 99 and the Bear Creek Greenway, including Cities of Talent and Phoenix and Jackson County, in a visioning and planning process. The intended outcome of the process is to create a plan and development code language for redeveloping the land adjacent to the transportation corridor in a manner that supports multi-modal transportation, with a particular emphasis on walking and biking, and multi-use hubs or nodes that improve destination accessibility and reduce the need for motor vehicle travel.

The Project supports the Transportation and Growth Management (“TGM”) Program’s mission of integrated land use and transportation planning by enhancing opportunities for people to walk, bike, and use transit, and improving destination accessibility by increasing mixed-use residential/commercial development along Highway 99.

Project Area

The Project Area comprises the land along the Highway 99 / Bear Creek Greenway corridor between the city limits of Medford and Ashland, including properties inside and outside of the Almeda Fire burn scar that are adjacent to both sides of Highway 99, and properties between Highway 99 and the Bear Creek Greenway (See Figure 1). The project will consider connections to Highway 99 and the Bear Creek Greenway from areas outside the immediate Project Area. The Project Area may be refined during the Project.

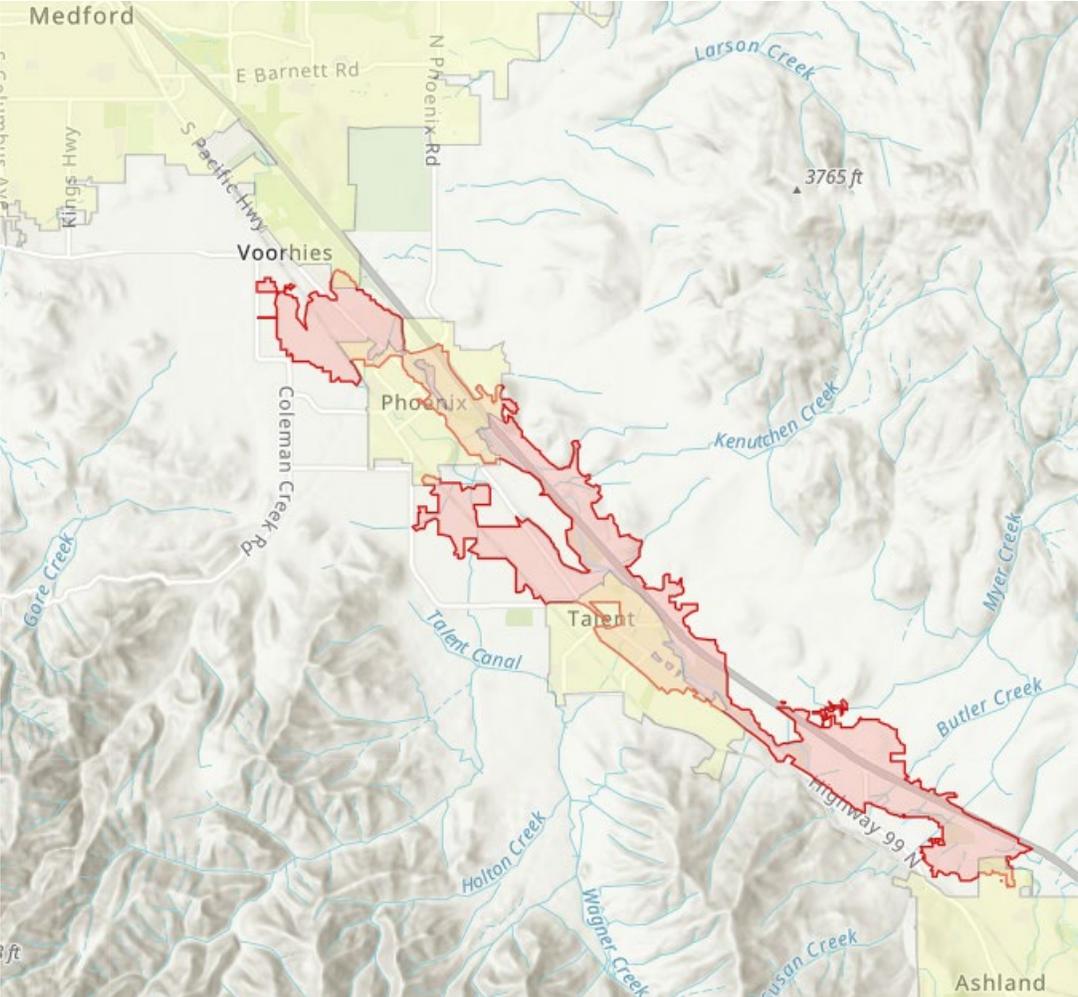


Figure 1 (Burn scar indicated in red.)

Background

In early September, the Almeda Fire began in northern Ashland and moved north up the Highway 99 and Bear Creek corridor through the cities of Talent and Phoenix, as well as unincorporated Jackson County. Altogether, the fire destroyed approximately 2,500 residential properties, including approximately 1,500 manufactured homes in 18 mobile home parks and approximately 180 commercial properties. Southern Oregon suffers from a substantial lack of housing affordable to local residents. This affordability problem has been exacerbated by the Almeda Fire. The vegetation along the Bear Creek Greenway, a 20-mile, paved, multi-use trail that links the cities of Ashland, Talent, Phoenix, Medford, and Central Point, suffered major damage as well. A significant portion of the destroyed housing, especially manufactured housing, was located in the Bear Creek floodplain or floodway. This will impact redevelopment options and, potentially, the affordability of replacement housing.

Prior to the Almeda Fire, development of land adjacent to the Highway 99 corridor consisted of a mix of uses including commercial, industrial, and low- to high-density residential. However, the development was largely inefficient, automobile-oriented, and lacked identity and place-making elements. Furthermore, significant portions of Highway 99 lack adequate facilities and are unsafe and uncomfortable for people traveling on foot or by bike, including a large number of traditionally underserved residents living near the Highway throughout this corridor.

The Oregon Department of Transportation (“ODOT”) is working on two projects within the Project Area that will add bicycle and pedestrian facilities to portions of Hwy 99. Both projects are currently in the design phase. The [Coleman Creek Culvert Replacement](#), just north of the North Phoenix Road intersection, will replace an existing culvert with a new bridge that will include sidewalks and bike lanes. The [Glenwood Road to Coleman Creek Project](#) will retain the existing five-lane width of Hwy 99, but widen it further to add sidewalks and bike lanes on both sides. Crosswalks, as well as crossing islands to give pedestrians a safer place to wait while crossing five lanes of traffic, will also be added.

The Bear Creek Greenway parallels Hwy 99, providing a non-motorized route for people traveling through the area. It is a great asset to the region and attracts many users, but safety concerns (real and perceived) decrease the comfort level for many potential users. The Greenway also lacks complete connections to destinations on the Highway.

TGM Program Objectives

The TGM Program is a joint effort of ODOT and Department of Land Conservation and Development (“DLCD”). The goals of TGM are to strengthen the capability of local governments to effectively manage growth and comply with the Oregon Transportation Planning Rules (Oregon Administrative Rules 660-012-0000) (“TPR”), to integrate transportation and land use planning, and to encourage transportation-efficient land uses that support modal choice and the efficient performance of transportation facilities and services. Specifically, TGM supports efficient use of land and resources; human-scaled, walkable communities; good connections between local destinations; and pedestrian, bicycle, and transit-oriented development.

The TGM Program’s *Smart Development Code Handbook*, identifies Five Principles of Smart Development:

- Efficient use of land resources
- Full utilization of urban services
- Mixed use
- Transportation options
- Detailed, human-scaled design

The Project must be done in a manner that furthers the Five Principles of Smart Development and supports the TGM Mission, Goals, and Objectives, available here:

<https://www.oregon.gov/lcd/TGM/Documents/mission-goals-objectives.pdf>

Project Objective

The Project Objective is to create a vision and implementing regulations to redevelop the land uses in the Project Area in a manner that supports multi-modal transportation (with an emphasis on walking, biking, and transit) and multi-use hubs that improve destination accessibility and reduce the need for transportation. The Project consists of two principal parts, to be conducted in two phases.

- 1) Phase One, is a visioning and strategic planning process to:
 - a. Identify projects to enhance opportunities for people to walk, bike, and use transit, including access to transit routes. This will require a review of existing plans and funded projects in place by ODOT and the local jurisdictions, and interviews with the cities and residents to develop a list of potential feasible projects. Changes to the number of travel lanes will not be considered as part of this project.
 - b. Recognize the opportunities and challenges of the post-fire landscape, which has resulted in conditions that are different from those on which existing plans and regulations are based.
 - c. Evaluate increased housing opportunities and types (especially affordable housing types) through mixed-use (vertical and horizontal) nodal commercial/residential development along Highway 99, including a review of opportunities and constraints for zoning districts along the corridor,
 - d. Develop design elements and other suggestions for placemaking for the City of Talent and the City of Phoenix, including green infrastructure strategies to mitigate flooding and improve multi-modal transportation.

- 2) Phase Two, will occur after Local Jurisdictions convene to confirm the direction of the project in Task 4. The Phase Two tasks will be added through an amendment to this statement of work (“SOW”). Phase Two deliverables are expected to include a final report with recommendations for design concepts, adoption-ready comprehensive plan language (goals and policies), and adoption-ready zoning code amendments for each of the three participating local governments, including:
 - a. Recommendations to implement the goals and vision identified in the visioning and strategic planning process (1, above);
 - b. Recommendations to increase safety, visibility, and connectedness to the Bear Creek Greenway. This includes a review of current issues (safety, homelessness, gaps in connections, etc.), a list of improvements and policies to address those issues, and trail-oriented development; and

- c. Comprehensive plan and development code amendments (including graphics) for increased housing, including affordable housing, and mixed-use options in the Project area.
- d. Analysis to support the comprehensive plan and development code amendments including traffic analysis to meet Oregon Administrative Rules 660-012-0060 requirements. Recommended changes to the transportation system must comply with ODOT standards and satisfy TGM goals and objectives.

C. STANDARDS and GENERAL REQUIREMENTS

Unless otherwise specified:

General Requirements for Project Management

Project management tasks are integrated into each of the tasks, but are described here to establish a framework for managing the Project.

A Project Management Team (“PMT”), comprising a Local Project Manager from each of the local jurisdictions City of Phoenix, City of Talent and Jackson County (“Local Jurisdictions”), Agency Project Manager (“APM”), DLCD Southern Oregon Regional Representative, ODOT Region 3 representative, and Consultant, shall provide overall guidance for the Project. Other members may be added to the PMT as needed. Meetings of the PMT are not anticipated to exceed two hours.

Consultant shall maintain regular communication with the PMT to ensure satisfactory completion of deliverables in accordance with Project Schedule.

General Requirements for Meetings

Project meetings will be held in person, by video, by telephone, or any combination of the aforementioned, as determined by the APM.

Meeting arrangements include: scheduling meeting dates and times with meeting participants, distribution of agendas and meeting materials in advance of the meeting, reserving a suitable meeting location, placing advertisements in local media, and posting notices in public locations (such as Local Jurisdiction buildings and libraries).

Conducting meetings includes: preparing agendas and meeting materials, making presentations, and facilitating discussion of relevant issues.

Local Jurisdictions shall prepare and distribute all staff reports, necessary public notices, and notifications, and public outreach for Local Jurisdictions Leaders meetings within each jurisdiction.

At all meetings, Consultant shall advocate for smart development principles and the removal of obstacles to them, and make persuasive arguments for amendments that encourage smart development as identified in TGM’s *Smart Development Code Handbook* (https://www.oregon.gov/lcd/Publications/SmartDevelopmentCodeHandbook_1997.pdf) and in accordance with current smart development best practices.

Consultant shall prepare text for press releases, advertisements, and announcements; provide translation where required; and graphics for public involvement material.

General Requirement for Written and Graphic Deliverables

All written and graphic deliverables must be submitted in a format suitable for distribution by e-mail unless hardcopy is specified in a subtask. Written deliverables must include the project name, date of preparation, and subtask number and name. Text (except for photo or illustration captions) must be in at least a 12-point font size to ensure readability. Written and graphic deliverables must use appropriate color contrast for the visually impaired.

Deliverables must be written concisely and use a simple and direct style, both to minimize the length of the final document and to make the document understandable to as large an audience as is reasonable. Where possible, Consultant shall present information in graphic or tabular format, with a simple and concise accompanying narrative.

Consultant shall write materials intended for the public, such as meeting presentations, at no higher than a high school grade level using the Flesch–Kincaid Grade Level Formula.

Graphic deliverables may be developed in ArcMap, Adobe Illustrator, Auto CAD, PCMaps, or other applications appropriate to the deliverable. Graphic deliverables submitted for review must be converted to .pdf for readability. Electronic files of final graphics submitted to the City and Agency may be in the native application but must also be converted to .pdf. All graphic deliverables must be well documented, with project name, a legend, and the date of preparation. Maps, aerial photos, and other graphic material prepared for Project must be suitable for enlargement to create wall displays for Project meetings and presentations.

Due Dates, PMT Review, and Consultant Edits

- Consultant shall submit deliverables for all meetings at least two weeks prior to the meeting, unless another timeframe is specified in this contract. Deliverables must be provided to PMT unless otherwise specified in this contract.
- Each Local Jurisdiction shall provide one set of written comments on draft materials within two weeks of receipt. If multiple staff members are commenting, the comments shall be reconciled by Local Project Managers. If the Local Jurisdictions cannot reconcile conflicting comments, APM will determine which comment will be kept.
- APM will provide written comments on draft materials within two weeks of receipt.
- Based on comments received, Consultant shall submit minor revisions and corrections to materials prior to release. Consultant is not required to make major or extensive revisions without an approved contract amendment. This provision does not limit the right of the State to require correction of deliverables that do not meet the requirements of this Contract. APM will determine what constitutes a “minor” or “major” edit.

Consultant shall ensure that the final deliverable produced pursuant to this Contract include the following statement:

This project is partially funded by a grant from the Transportation and Growth Management (TGM) Program, a joint program of the Oregon Department of Transportation and the Oregon

Department of Land Conservation and Development. This TGM grant is financed, in part, by federal Fixing America's Surface Transportation Act (FAST-Act), local government, and State of Oregon funds.

The contents of this document do not necessarily reflect views or policies of the State of Oregon.

Consultant, TGM, ODOT, and DLCD names or logos may not appear on final deliverables, with the exception of the acknowledgement page.

General Requirements for Public Involvement

It is expected that public involvement for the Project will be significant, requiring a variety of mechanisms. The process will provide a valuable source of assistance on decisions and build support and understanding. The public must be engaged in all key activities and decisions, and their input must be incorporated to the maximum extent possible. **The public involvement approach must give people who lack formal organization or influence the opportunity to have a meaningful impact, including extensive outreach to the business community, to community-based organizations, and to the population of traditionally underserved residents (defined in Task 2) who lived in the Project Area, but have been largely displaced by the fire.**

Consultant and Local Jurisdictions shall consider environmental justice issues, which is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income. The Project will follow the three fundamental principles of environmental justice established by the U.S. Department of Transportation's Environmental Justice Program (<https://www.transportation.gov/civil-rights/civil-rights-awareness-enforcement/program-goals>): 1) avoid, minimize, or mitigate disproportionately high, adverse environmental and human health impacts; 2) ensure full and fair participation by individuals comprising communities affected by the project decision making process; and 3) prevent the denial of or significant delay in the receipt of benefits by minority and low-income populations.

Fair treatment means that no group of people, including a racial, ethnic, or a socioeconomic group, should bear a disproportionate share of the negative environmental consequences resulting from industrial, municipal, and commercial operations or the execution of federal, state, local, and tribal programs and policies. Meaningful involvement means that: (1) potentially affected community residents have an appropriate opportunity to participate in decisions about a proposed activity that will affect their environment and/or health; (2) the public's contribution can influence the regulatory agency's decision; (3) the concerns of all participants involved will be considered in the decision making process; and (4) the decision makers seek out and facilitate the involvement of those potentially affected.

The Task 2 Public Involvement Plan ("PIP") and all public involvement activities must include specific steps to provide opportunities for participation in accordance with the 1964 Civil Rights Act, Title VI. Local Jurisdictions shall utilize ODOT Title VI guidance (https://www.oregon.gov/ODOT/Planning/Documents/TitleVI-EJ_Guidance.pdf) to formulate public involvement strategies and report public outreach efforts. In addition, public participation strategies must be designed to achieve the **Collaborate** level of public participation for this Project on the International Association of Public Participation ("IAP2") Spectrum of Public Participation:

[https://iap2usa.org/Resources/Documents/IAP2%20Federation%20-%20P2%20Pillars%20\(2\)%20\(1\).pdf](https://iap2usa.org/Resources/Documents/IAP2%20Federation%20-%20P2%20Pillars%20(2)%20(1).pdf)

Public Involvement Responsibilities for Local Jurisdictions and Consultant

In addition to any responsibilities specified in individual tasks, the following responsibilities are assigned for all tasks and subtasks that require public outreach and involvement.

Local Jurisdictions shall:

- issue press releases,
- place advertisements in a variety of media, including print, digital, and broadcast media,
- process and send mail and e-mail,
- place articles and announcements in area publications and social media, and
- conduct other activities to support public involvement efforts for the Project.

E. TASKS, DELIVERABLES, and SCHEDULE

TASK 1: PROJECT MANAGEMENT

1.1 PMT Meetings

Consultant shall arrange and conduct PMT Meetings via conference call approximately once a month, up to eighteen. In addition, certain in-person PMT meetings are specified within the individual tasks.

1.2 PAC Roster, and CAC Roster

Consultant shall consult with Local Jurisdictions to establish a Project Advisory Committee (“PAC”) and prepare a Roster of up to twenty individuals, containing member names, represented group, and contact information. The PAC is expected to review and comment on deliverables and provide technical and policy advice according to member expertise. To ensure a collaborative process, the PAC is expected to consist of Local Jurisdiction staff, representatives from the neighboring jurisdictions: City of Ashland, City of Medford, and staff from relevant districts, partner agencies, and organizations, including non-governmental organizations. Local Jurisdictions shall recruit/select other PAC members based on discussion at PMT Meeting #1. PAC meetings are detailed in the subsequent tasks.

Consultant shall consult with Local Jurisdictions to establish a Citizen Advisory Committee (“CAC”) and prepare a Roster. The CAC membership must consist of people who live in the Project Area or people who were displaced from the Project Area as a result of the Alameda Fire and would like to return. To the extent feasible, the demographic composition (including age, gender, location of residence, race and ethnicity, educational attainment, experience of a disability, and renter/homeownership status) of the CAC must reflect the population of the Project Area prior to the Alameda Fire and further the objectives of General Requirements for Public Involvement. The CAC will provide input and feedback throughout the Project. CAC meetings are detailed in the subsequent tasks.

1.3 Project Charter

Consultant shall create a draft and final Project Charter that outlines communication, decision-making framework, roles and responsibilities of groups and committees, risks, expectations, change management, and schedule. Consultant shall prepare final Project Charter after PMT Meeting #1.

1.4 Background Information

Local Jurisdictions and APM shall provide to Consultant available Background Information in the most convenient and accessible forms (e.g., hard copy, electronic copies or web-links), including the following:

1. Development code and complete comprehensive plan (including all elements) of each Local Jurisdiction
2. OR 99 Rogue Valley Corridor Plan (Garfield Street to S. Valley View Road) (2015)
3. ODOT's Blueprint for Urban Design
4. Draft (or Final, if available) Rogue Valley Active Transportation Plan
5. Rogue Valley Transportation District 2040 Transit Master Plan
6. Rogue Valley Metropolitan Planning Organization (Regional Transportation Plan
7. Map of Project Area with boundaries, all street names, and other key geographic features, including floodplain and floodway
8. List of ongoing projects in the Project Area, including brief description of Project, project sponsor, and any other relevant information
9. Any known market studies done for the Project Area since 2011

Local Jurisdictions and APM shall provide the Background Information to Consultant at least two weeks in advance of PMT Meeting #1 to allow time for review.

1.5 PMT Meeting #1 and Refined Project Schedule

Consultant shall arrange and conduct PMT Meeting #1, which is a start-up meeting to review the draft Project Charter and discuss the Project Schedule, PAC and CAC Rosters, and upcoming public involvement tasks.

PMT will review Background Information and develop list of additional information that the Local Jurisdictions need to provide. Consultant shall work with PMT to develop a list of Stakeholders to be interviewed in Task 2. Consultant shall prepare a Refined Project Schedule based on PMT discussion and showing the duration of work tasks and subtasks needed to complete the Project.

Local Jurisdiction Deliverables

- 1.1 PMT Meetings, up to 18
- 1.4 Background Information
- 1.5 PMT Meeting #1

Review and comment on Task 1 Consultant deliverables

Consultant Deliverables

- 1.1 PMT Meetings, up to 18
- 1.2 PAC Roster and CAC Roster
- 1.4 Project Charter
- 1.5 PMT Meeting #1 and Refined Project Schedule

TASK 2: PUBLIC INVOLVEMENT STRATEGY

2.1 Public Involvement Plan

Consultant shall create a draft and final PIP that is consistent with the Project’s public involvement goals and processes. The PIP must, at minimum:

- State public involvement goals
- Address Project public involvement tasks of this SOW (and may also include Local Jurisdiction public involvement activities not specified in the tasks of this SOW);
- Be tailored to community composition, based on a demographic analysis using U.S. Census data and any other relevant demographic data from other sources;
- Follow the “General Requirements for Public Involvement” stipulated in Standards and General Requirements section of this SOW and comply with civil rights, environmental justice, social equity goals, and Title VI requirements (see: <https://www.oregon.gov/ODOT/Planning/Pages/Public-Involvement.aspx>);
- Give people who lack formal organization or influence the opportunity to have a meaningful impact through a variety of means;
- Include outreach to transit riders, bicyclists, and pedestrians;
- Propose involvement and facilitation techniques for inclusively engaging diverse populations and stakeholders, with an emphasis on visual and, where applicable, multilingual communications or other methods to encourage participation of all populations with an interest in the Project Area, including those who have been displaced as a result of the fire.
- Define the intended outreach strategies and formats (e.g., community newspapers and other media outlets, social media, community associations, groups or congregations, accessible meeting locations, and contacts), including a thorough social media strategy, in English and Spanish, that creates a presence on the platforms used by area residents of all ages;
- Identify the person or entity responsible for each specific outreach task and related deadlines;
- Recognize the significant presence of Hispanic people and businesses by scheduling, locating, and conducting meetings in a manner that welcomes and engages all community members, including those whose primary language is not English.

2.2 Project Website and Social Media

Consultant shall, with input from the PMT, create, maintain, and host a Project Website for the duration of the Project and for at least six months after the expiration date. Project Website must have at least the following features:

- Description of the Project and Project FAQ;
- Contact person (as agreed to by the PMT);
- List of meetings and other events, and meeting materials;
- Sign-up for a Project email list;
- All page content available in English and Spanish as directed by the PIP (some linked documents may not be available in both languages);
- An embedded translate tool,

- Elements such as comment submittal, interactive mapping, online meeting tools, and surveys as necessary for public meetings (these features may be available during time-limited windows);
- No registration required for participation in interactive features;
- Format that is fully compatible with mobile devices; and
- Simple writing style and use of simple graphics to convey information where possible.

Consultant shall create a social media presence in English and Spanish, including project-specific pages or accounts, as directed by the PIP.

Each Local Jurisdiction shall provide prominent links on their websites to the Project Website. In concert with each public meeting, Consultant shall post agendas, summaries, and other updates. Consultant shall coordinate with PMT to provide responses to comments and questions.

2.3 Stakeholder Interviews Summary Report

Consultant shall arrange and conduct interviews to seek input about the expectations for the Project, the values of the community that are relevant for the Project, and information needed for later tasks, including Task 3’s Existing Conditions and Opportunities Survey and Development Feasibility Memorandum. Consultant shall review Background Information in preparation for the interviews.

Consultant shall conduct up to ten one-hour stakeholder interviews, with one to three stakeholders attending each interview. Local Jurisdictions, in consultation with PMT, shall identify the stakeholders to interview. Stakeholders must be evenly distributed among the Local Jurisdictions and include at least the following interest groups: owners or managers of local businesses and property; owners of manufactured home parks; local community organizations that represent low-income, elderly, youth, transit-dependent, and Hispanic populations; affordable housing developers or providers; and non-motorized transportation advocates.

Consultant shall prepare a Stakeholder Interview Summary Report outlining key results from the interviews.

2.4 PAC Meeting #1

Consultant shall arrange and conduct an initial meeting of the PAC to review the goals and objective of the Project, the Project scope and schedule, methods of public participation, and other Project issues. PAC Meeting #1 must include a review of the Stakeholder Interview Summary Report and PIP. Local Jurisdictions shall attend to answer questions.

Consultant shall prepare PAC Meeting #1 summary notes.

2.5 Interested Parties List

Consultant shall, in consultation with PMT, prepare an Interested Parties List for the Project. In creating the Interested Parties List Consultant shall make special efforts to reach out to limited-English proficiency and other traditionally underserved populations. Traditionally underserved population “refers to a broad category that includes minority and low-income populations but may also include many other demographic categories that face challenges engaging with the transportation process and reaping equitable benefits, such as children, the elderly, and the disabled” (Federal Highway Administration Environmental Justice Reference Guide:

https://www.fhwa.dot.gov/environment/environmental_justice/publications/reference_guide_2015/section05.cfm). Local Jurisdictions and Consultant shall use the interested parties list in their notification and outreach efforts.

Local Jurisdiction Deliverables:

- 2.2 Links to Project Website and Social Media
 - 2.4 PAC Meeting #1
- Review and comment on Task 2 Consultant deliverables

Consultant Deliverables:

- 2.1 PIP
- 2.2 Project Website and Social Media
- 2.3 Stakeholder Interviews Summary Report
- 2.4 PAC Meeting #1
- 2.5 Interested Parties List

TASK 3: VISIONING AND STRATEGIC PLANNING

3.1 Existing Conditions and Opportunities Survey

Consultant shall prepare a draft and final Existing Conditions and Opportunities Survey that documents the location and condition of the following items in the Project Area:

- Key origins (e.g., residential areas) and destinations (e.g., businesses, schools, services, etc.);
- Existing transportation facilities, including non-motorized transportation facilities;
- Existing connections between and access to transportation facilities;
- Gaps in access to transportation facilities;
- Opportunities for new connections to transportation facilities;
- Transit routes, service levels, and stops;
- Buildable lands inventory in the Project Area that takes into account pre-existing and newly vacant land as a result of fire damage, as well as flood hazard areas; and
- Optimal locations and design for mixed-use nodes and additional housing density to enhance location efficiency and make walking, biking, and transit more feasible as principal transportation modes.

Consultant shall use at least the following sources and methods to conduct the Opportunities Survey. These methods are in addition to other meetings and tasks listed in this SOW:

- Background Information from Task 1;
- Stakeholder interviews from Task 2;
- Consultation with the PMT, PAC, and CAC;
- Online survey in English and Spanish, oriented to the general public, that includes evaluation of visual preferences and the opportunity to give location-specific (i.e., mapped) input; and
- Two online live public meetings (one in English, one in Spanish) to present the Project, explain the online survey component of the Existing Conditions and Opportunities Survey, and seek public input.

The Existing Conditions and Opportunities Survey shall be submitted as a report that includes simple narrative, graphics (including photographs), and maps.

Consultant shall prepare final Existing Conditions and Opportunities Survey after Task 3 meetings.

3.2 PMT Meeting #2

Consultant shall arrange and conduct PMT Meeting #2 via remote conference to review the draft Existing Conditions and Opportunities Survey. Consultant shall prepare meeting summary notes.

3.3 PAC Meeting #2

Consultant shall arrange and conduct PAC Meeting #2 via remote conference to report on the online public meeting and survey, and review the draft Existing Conditions and Opportunities Survey. Consultant shall prepare meeting summary notes.

3.4 CAC Meeting #1

Consultant shall arrange and conduct CAC Meeting #1 via remote conference to introduce the Project, report on the online public meeting and survey, review and seek feedback on the draft Existing Conditions and Opportunities Survey, and discuss desired Project outcomes. Local Jurisdictions shall provide a place for CAC members to use a computer to attend the remote conference if they do not have computer access. Consultant shall prepare meeting summary notes.

3.5 Development Feasibility Memorandum

Consultant shall prepare a Development Feasibility Memorandum, which must:

- outline the possible types, sizes, and mixes of development on vacant, semi-vacant, and redevelopable parcels within the Project Area;
- identify financial, plan, and regulatory barriers to, and potential incentives for, development consistent with Local Jurisdiction needs and TGM objectives;
- explain the long-term financial implications for public budgets of compact mixed-use versus low-density development patterns;
- address opportunities and obstacles for new development, including opportunities for affordable, compact, land-efficient commercial and residential uses, and multi-story development; and
- consider development constraints presented by the Bear Creek floodplain and the Glenwood Road to Coleman Creek highway widening project.

Consultant shall review notes from Stakeholder Meetings and information obtained in the Existing Conditions and Opportunities Survey to prepare a list of possible development options (types, sizes, and mixes of development) that will be examined in this task. Consultant shall use measures of growth and development that take into account the post-fire reality of the Project Area, updated forecasts of employment and populations if available, current real estate market conditions, development fees, and typical mixed-use zoning standards to evaluate opportunities for various development options (types, sizes, and mixes of uses and buildings). The Development Feasibility Memorandum must include a market analysis to determine the commercial viability for each development option, and make recommendations for lowering development code barriers to make desired development mixes feasible in the existing market.

3.6 Placemaking Workshops and Recommendation Report

Consultant shall arrange and conduct two online Placemaking Workshops to gather information and feedback for Project Objective 1.d.: “Develop design elements and other suggestions for placemaking for the City of Talent and the City of Phoenix, including green infrastructure strategies to mitigate flooding and improve multi-modal transportation.”

Placemaking Workshop 1 must be a live, guided workshop for the CAC. Local Jurisdictions shall provide a place for CAC members to use a computer to attend the workshop if they do not have computer access. Consultant shall prepare workshop summary notes.

Placemaking Workshop 2 shall be designed for the general public to complete on their own time on a computer or mobile device (i.e., smart phone or tablet) with internet service. In order to accommodate members of the public who don’t have access to technology, Local Jurisdictions shall arrange for safe, convenient, accessible, welcoming places to access Placemaking Workshop 2. These locations should be hosted by local non-governmental organizations or public libraries to the extent possible. Consultant shall also design a paper version of Placemaking Workshop 2. Local Jurisdictions shall provide copies of the paper version in convenient locations and at the request of community members. Placemaking Workshop 2 must be offered in English and Spanish, designed to allow participation by people with sight and hearing impairments, and be available for at least four weeks.

Both workshops must:

- Be oriented to the general public, specifically, following the public involvement direction of the PIP;
- Use simple language and graphics;
- Be based on the principles of placemaking as described in the Project for Public Spaces publication, “Placemaking: What If We Built Our Cities around Places?” (https://assets-global.website-files.com/5810e16fbe876cec6bcbd86e/5a6a1c930a6e6500019faf5d_Oct-2016-placemaking-booklet.pdf);
- Include interactive elements in order to address the “Community is the expert” principle of the Project for Public Spaces and the “Collaborate” level of participation of IAP2; and
- Integrate TGM and Smart Development objectives of the project, including a focus on the Bear Creek Greenway as a transportation corridor.

Consultant shall produce a draft and final Placemaking Recommendation Report summarizing the Workshop and their recommendations for placemaking in the Cities of Talent and Phoenix. The Placemaking Recommendation Report must include design elements and implementation steps.

3.7 CAC Meeting #2

Consultant shall arrange and conduct CAC Meeting #2 via remote conference to review and seek feedback on the draft Placemaking Recommendation Report. Local Jurisdictions shall provide a place for CAC members to use a computer to attend the remote conference if they do not have computer access. Consultant shall prepare meeting summary notes.

3.8 Comprehensive Plan and Development Code Evaluation Memorandum

Consultant shall review and evaluate the materials from Task 1 Background Information to produce a draft and final Comprehensive Plan and Development Code Evaluation Memorandum. The analysis approach for the Comprehensive Plan and Development Code Evaluation Memorandum must

support TGM Program Objectives and the Project Objective. The Comprehensive Plan and Development Code Evaluation Memorandum must also:

- Include general recommendations for the Development Code and Comprehensive Plan Amendments in Phase Two of the Project;
- Evaluate whether the amendments should include zoning map changes;
- Demonstrate recommendations' compliance with the TPR; and
- Be organized into three main sections, one for each Local Jurisdiction, in order to facilitate review by people who are interested in the evaluation of a specific jurisdiction.

3.9 PMT Meeting #3

Consultant shall arrange and conduct PMT Meeting #3 via remote conference to review the draft Plan and Development Code Evaluation Memorandum prior to its release to the PAC, CAC, and wider public. Consultant shall prepare meeting summary notes.

3.10 PAC Meeting #3

Consultant shall arrange and conduct PAC Meeting #3 via remote conference to review and seek feedback on the draft Placemaking Recommendation Report and the Plan and Development Code Evaluation Memorandum. Consultant shall prepare meeting summary notes.

Local Jurisdiction Deliverables:

- 3.2 PMT Meeting #2
- 3.3 PAC Meeting #2
- 3.4 CAC Meeting #1
- 3.6 Placemaking Workshops and Recommendation Report
- 3.7 CAC Meeting #2
- 3.9 PMT Meeting #3
- 3.10 PAC Meeting #3

Consultant Deliverables:

- 3.1 Existing Conditions and Opportunities Survey
- 3.2 PMT Meeting #2
- 3.3 PAC Meeting #2
- 3.4 CAC Meeting #1
- 3.5 Development Feasibility Memorandum
- 3.6 Placemaking Workshops and Recommendation Report
- 3.7 CAC Meeting #2
- 3.8 Plan and Development Code Evaluation Memorandum
- 3.9 PMT Meeting #3
- 3.10 PAC Meeting #3

TASK 4: LOCAL JURISDICTION MEETINGS

4.1 Local Jurisdiction Leaders Meetings

Consultant shall arrange and conduct up to five Local Jurisdiction Leaders Meetings via remote conference to check in with the Planning Commissions and City Councils or County Board of Commissioners of each Local Jurisdiction (“Local Jurisdiction Leaders”) about the progress of the

Project, and confirm support for and direction of the Project, prior to drafting amendments. Consultant shall present a project update, a report of results and public input to date, and a general outline of expected Code and Comprehensive Plan amendments. Local Jurisdiction Leaders shall have an opportunity to give feedback and ask questions. Consultant shall prepare summary notes for each meeting.

4.2 PMT Meeting #4

Consultant shall arrange and conduct PMT Meeting #4 via remote conference to discuss the Local Jurisdiction Meetings and confirm direction for Phase Two of the Project. Consultant shall prepare meeting summary notes.

4.3 Phase One Title VI Report

Consultant shall prepare and submit to ODOT a report delineating Title VI activities, and documenting Project processes and outreach for all low income, race, gender, and age groups.

Local Jurisdiction Deliverables:

- 4.1 Local Jurisdiction Leaders Meetings
- 4.2 PMT Meeting #4

Consultant Deliverables:

- 4.1 Local Jurisdiction Leaders Meetings
- 4.2 PMT Meeting #4
- 4.3 Phase One Title VI Report

TASK 5: CONTINGENT TASKS

Contingent Task: No work under this contingent task shall be done without the prior written approval (e-mail acceptable) of APM. APM shall give separate written authorization for each meeting in this contingent task.

5.1 Contingent Project Coordination Meeting #1

To ensure that public involvement and information sharing is accomplished, between this Project and other significant projects occurring within the Project Area, the Consultant shall arrange and conduct Contingent Project Coordination Meeting #1 via remote conference. Consultant shall prepare meeting summary notes.

5.2 Contingent Project Coordination Meeting #2

To ensure that public involvement and information sharing is accomplished, between this Project and other significant projects occurring within the Project Area, the Consultant shall arrange and conduct Contingent Project Coordination Meeting #2 via remote conference. Consultant shall prepare meeting summary notes.

5.3 Contingent Meeting #1

Consultant shall arrange and conduct an additional meeting, work session, or hearing, to be held in the Project Area. Consultant shall present information using material from previous meetings and products developed over the course of the project. Consultant shall prepare meeting summary notes.

5.4 Contingent Meeting #2

Consultant shall arrange and conduct an additional meeting, work session, or hearing, to be held via remote conference. Consultant shall present information using material from previous meetings and products developed over the course of the project. Consultant shall prepare meeting summary notes.

5.5 Contingent Meeting #3

Consultant shall arrange and conduct an additional meeting, work session, or hearing, to be held via remote conference. Consultant shall present information using material from previous meetings and products developed over the course of the project. Consultant shall prepare meeting summary notes.

Local Jurisdiction Deliverables:

- 5.1 Contingent Project Coordination Meeting #1
- 5.2 Contingent Project Coordination Meeting #2
- 5.3 Contingent Meeting #1
- 5.4 Contingent Meeting #2
- 5.5 Contingent Meeting #3

Consultant Deliverables:

- 5.1 Contingent Project Coordination Meeting #1
- 5.2 Contingent Project Coordination Meeting #2
- 5.3 Contingent Meeting #1
- 5.4 Contingent Meeting #2
- 5.5 Contingent Meeting #3

PHASE TWO TASKS

The following tasks are expected to be carried out under Phase Two of the Project, however, they may be amended according to the outcome of Phase One, but will remain in within the scope of this request for proposals:

- Methodology Memorandum
- Development Code and Comprehensive Plan Amendments Draft #1
- PMT Meeting #5
- PAC Meeting #4
- CAC Meeting #3
- Community Meeting
- Draft Final Report and Development Code and Comprehensive Plan Amendments Draft #2
- Transportation Analysis and Findings Memo
- PAC Meeting #5
- Final Report and Development Code and Comprehensive Plan Amendments
- Project Information Sheet
- Phase Two Title VI Report

Phase One Project Schedule (18 months time frame from Notice to Proceed)

Task 1	Continuous (months 1-18)
Task 2	Months 2-13
Task 3	Months 6-11
Task 4	Months 12-13
Task 5	TBD (months 1-18)

CONSULTANT DELIVERABLE TABLE

Task	Description	Fixed Deliverable Price	Max Quantity	Not-to-Exceed Amount
1	PROJECT MANAGEMENT			
1.1	PMT Meetings		18	
1.2	PAC Roster and CAC Roster			
1.3	Project Charter			
1.4	PMT Meeting #1 and Refined Project Schedule			
	Task Total			
2	PUBLIC INVOLVEMENT STRATEGY			
2.1	Public Involvement Plan			
2.2	Project Website and Social Media			
2.3	Stakeholder Interviews Summary Report			
2.4	PAC Meeting #1			
2.5	Interested Parties List			
	Task Total			
3	VISIONING and STRATEGIC PLANNING			
3.1	Existing Conditions and Opportunities Survey			
3.2	PMT Meeting #2			
3.3	PAC Meeting #2			
3.4	CAC Meeting #1			
3.5	Development Feasibility Memorandum			
3.6	Placemaking Workshops and Recommendation Report			
3.7	CAC Meeting #2			
3.8	Comprehensive Plan and Development Code Evaluation Memorandum			
3.9	PMT Meeting #3			
3.10	PAC Meeting #3			
	Task Total			
4	AMENDMENTS AND FINAL REPORT			
4.1	Local Jurisdiction Leaders Meetings		5	
4.2	PMT Meeting #4			
4.3	Phase One Title VI Report			
	Task Total			
5	CONTINGENT TASKS			
5.1	Contingent Project Coordination Meeting #1			

Task	Description	Fixed Deliverable Price	Max Quantity	Not-to-Exceed Amount
5.2	Contingent Project Coordination Meeting #2			
5.3	Contingent Meeting #1			
5.4	Contingent Meeting #2			
5.5	Contingent Meeting #3			
	Task Total			
	CONSULTANT Amount			