

**CITY OF SHERWOOD, OREGON
REQUEST FOR PROPOSALS
CONSULTANT SERVICES
TRANSPORTATION SYSTEM DEVELOPMENT
CHARGE (SDC), AND STREET, SIDEWALK, AND
STREET LIGHTING FEES STUDY**

General Information

The City of Sherwood owns, operates, and maintains all public streets within the City of Sherwood city limits, excepting Highway 99W and Tualatin-Sherwood Road which are owned, operated, and maintained either by the State of Oregon Department of Transportation (ODOT) or Washington County Department of Transportation.

The City of Sherwood recently updated its Transportation System Plan (TSP), adopted June 2014, and also revised the estimated costs of design and construction of the projects listed in the TSP. The City now wishes to review, amend and update the City's Transportation System Development Charges (SDCs) relative to the TSP.

In addition, the City collects monthly fees for the operation and maintenance of the City's streets, sidewalks and street lighting. Along with the SDC analysis, the City wishes to review, amend and update the City's operations and maintenance fees for sidewalks, streets and street lighting.

As such, the City of Sherwood is seeking the services of a qualified consulting firm to conduct an appropriate analysis of the City's TSP, and using the data contained therein, review the existing Washington County Transportation Development Tax (TDT), the City's existing transportation SDCs and other reasonably likely funding, and generate an appropriate methodology for updating existing SDC fees. It is anticipated that the City-wide SDC would apply to all new development undertaken within the City, with the fees generated applied to city transportation projects identified within the TSP.

Additional, using information provided by the Public Works and Finance Departments, the consulting firm would perform a review of the City's street, sidewalk, and street lighting fees, and make recommendations for updated fees.

SDC Study Scope of Work

The scope of work is essentially as follows:

1. Data Collection & Review
 - a. Meet with City staff and review data needs and availability, and expected results.
 - b. Collect relevant information from the City's TSP, fixed asset records, the most recent comprehensive plans, facility plans, the 5-year Capital Improvement Plan, and Ordinances.
 - c. Review the information provided and extract the needed data for the study from the materials provided.
2. Develop SDC Policy Framework
 - a. Identify key policy questions to be addressed by the SDC study.

- b. Draft issue papers analyzing each policy question, and suggesting a preliminary course of action.
 - c. Meet with City staff to finalize policy recommendations.
- 3. Develop SDC Cost Basis
 - a. Determine the allocable cost of existing facilities using the City's asset inventory, facility plans, financial statements, and/or other documentation to determine the cost basis for the reimbursement fee.
 - b. Determine the allocable cost of future facilities using the City's recently updated TSP project design/construction cost estimates of eligible projects to determine the cost basis for the improvement fee.
- 4. Develop SDC Capacity Basis
 - a. Using the planning development and other growth related information, determine the capacity basis to be used to calculate the reimbursement and improvement fees.
 - b. The City's preferred approach is the local traffic forecast data from the TSP travel demand model developed for Sherwood. The use of other approaches such as the estimated growth left to build-out or applying a percentage growth on an annual basis may be accepted depending on the confidence level of these approaches.
- 5. Calculate SDCs
 - a. Develop a spreadsheet model- develop or adapt an existing computer spreadsheet model for use in this SDC analysis.
 - b. Develop/generate transportation SDC alternatives – identify and apply relevant capacity basis to eligible costs and estimated potential SDC alternatives for consideration by the City. The alternatives will illustrate policy choices regarding the identification of eligible costs, as well as “who benefits” and “who pays” for existing and planned system improvements. Include funding sources such as Major Streets Transportation Improvement Program (MSTIP), Metropolitan Transportation Improvement Program (MTIP) and the Washington County Transportation Development Tax (TDT) in the “who benefits”/”who pays” analysis.
 - c. Meet with City staff to review proposed alternative transportation SDCs and policy issues.
 - d. Generate a transportation SDC schedule recommendation which is accurate and defensible, and will meet City policy objectives.
 - e. Generate a draft transportation SDC ordinance, based on City ordinance standards and protocols, which assures compliance with City policy objectives and statutory requirements.
- 6. Documentation and Presentation
 - a. Draft Report - consultant shall prepare documentation of findings and

recommendations, and shall submit five (5) paper copies of the draft report along with an electronic file in PDF format.

- b. City Council Work Sessions – consultant shall present project analysis, findings and recommendations at City Council work sessions (3 meetings). The first meeting shall be prior to conducting an open house to the general public. The City Council may make recommendations which must be incorporated into the final analysis.
- c. Open House – consultant shall attend and support City staff in presenting the Draft Report findings to the public in an open house forum. The consultant shall be responsible for taking notes and preparing a summary report of submitted comments from the public at the open house. One (1) paper copy of the Open House Summary Report and an electronic file in PDF format shall be submitted to the City.
- d. Prepare Final Report – after review of/and incorporating comment changes, and approval by City staff of the Draft Report, consultant shall prepare final documentation of findings and recommendations, and shall submit five (5) paper copies of the final report along with an electronic file in PDF format.
- e. Meetings – the consultant shall attend and provide technical support in presenting the SDC final report findings to the City Council at public hearings (2 meetings). These two hearings are in addition to the three work sessions described in section (b) above.

Streets, Sidewalks, and Street Lighting Fee Study Scope of Work

The scope of work is essentially as follows:

1. Data Collection & Review
 - a. Meet with City staff and review data needs and availability, and expected results.
 - b. Collect and review information from City Public Works and Finance on street, sidewalk, and street lighting operations and maintenance costs, revenue sources, and projected maintenance projects.
 - c. Review the information provided and extract the needed data for the study from the materials provided.
2. Develop Fee Study Alternatives
 - a. Develop a spreadsheet model - develop or adapt an existing computer spreadsheet model for use in the fee analysis.
 - b. Develop/generate fee alternatives – identify and apply relevant operations and maintenance costs, revenue sources, and projected maintenance projects to develop fee structure alternative(s). The alternatives will take into account current operations and maintenance plans and policies.
 - c. Meet with City staff to review proposed alternative fee structures.
 - d. Generate a street, sidewalk, and street lighting operation and maintenance

fee schedule recommendation which is accurate and defensible, and will meet City policy objectives.

3. Documentation and Presentation

- a. Draft Report - consultant shall prepare documentation of findings and recommendations, and shall submit five (5) paper copies of the of the draft report along with an electronic file of the draft report in PDF format.
- b. City Council Work Sessions – consultant shall present project analysis, findings and recommendations at a City Council work session (3 meetings). These work session meetings may be performed concurrently with the work session meetings identified in item 6.b of the SDC Study Scope of Work above. City Council may make recommendations which must be incorporated into the final analysis.
- c. Prepare Final Report – after review of/and incorporating comment changes, and approval by City staff of the Draft Report, consultant shall prepare final documentation of findings and recommendations, and shall submit five (5) paper copies of the final report along with an electronic in PDF format.
- d. Meetings – the consultant shall attend and provide technical support in presenting the operations and maintenance fee final report findings to the City Council at public hearings (2 meetings). These public hearings may be performed concurrently with the public hearings identified in item 6.c of the SDC Study Scope of Work above.

Closing Date and Anticipated Project Schedule

Submit one (1) original and four (4) copies as well as an electronic file in PDF format on a CD, of the consultant’s proposal in a sealed envelope marked:

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Addressed to: City of Sherwood
22560 SW Pine Street St
Sherwood, OR 97140
Attention: Robert Galati

Project Manager is Robert Galati P.E., City Engineer

All proposals must be received no later than 4:00 p.m. (local time), Friday, September 18th, 2015. Proposals received after this date and time will not be accepted. Faxed or emailed proposal submittals are not acceptable.

Funding for this project is from the City’s current budget for fiscal year (FY) 2015-2016.

Award of a Consultant contract is anticipated to occur in October. It is anticipated that a final executed contract will be procured within 7 to 10 days after the award.

The preparation of the recommended Transportation System Plan (TSP) System Development Charge (SDC) portion of the Study shall be completed on or before Friday, April 8th, 2015, with the Street, Sidewalk, and Street Lighting Fee portion of the Study completed on or before June 10th, 2015. This will include bound copies and a PDF version of the study required to begin the public review and hearing process. Public review and final adoption will occur shortly after the City receives the bound copies and the PDF version.

Consultants submitting proposals, which are evaluated as being highly responsive to the RFP, may be requested to make an oral presentation to the Consultant Selection Committee.

Proposals shall remain in effect for a period of sixty (60) days after the closing date. Each responding Consultant may withdraw their proposal in writing at any time before closing date and time.

The proposal must state that the Consultant is an Equal Opportunity Employer and will comply with all Federal, State, and local laws, rules, and regulations.

CITY'S RIGHT TO ACCEPT, REJECT, AND AWARD PROPOSALS

The City reserves the right to:

- Accept or reject any or all proposals received as a result of this RFP;
- To negotiate contract terms with a qualified Consultant;
- Take into consideration any or all information supplied by the Consultant in his/her proposal and the City's investigation into the experience and responsibility of the Consultant. In addition, the City may accept or reject proposals based on minor variations from the stated specifications, when such action is deemed to be in the City's best interest. Further, the City reserves the right to waive informalities in the submitted proposal.
- Award a contract to the respondent who the City determines to be the most responsible and responsive to this RFP. The successful Consultant shall commence work only after an agreement with the City is negotiated, a contract fully executed, and a notice to proceed has been issued.
- Cancel the RFP process entirely if deemed in the best interest of the City.

Incurring Costs: Neither the City of Sherwood, nor its agents, are liable for any costs incurred by Consultants prior to issuance of a contract.

Pre-Proposal Interpretation: The City is not responsible for any explanation, clarification, interpretation, or approval made or given in any manner, except by Addenda. Addenda, if necessary, will be issued on the City's RFP project webpage <https://www.sherwoodoregon.gov/bids> not later than three (3) days prior to the RFP closing date. It is the responsibility of the Proposer to check the webpage for any posted addenda, and ensure that the submitted proposal includes said addenda. Questions must be received five (5) calendar days prior to the RFP closing date. Questions shall be

submitted to Robert Galati at galatib@sherwoodoregon.gov.

Contract Payment Schedule: Payment for work will be made monthly upon receipt of Consultant's billing statement, consistent with City procedures and as established by the Finance Department. Each statement must include summary of progress made through the date of the billing and shall be submitted to the project manager. Monthly payments will be based on the costs incurred as summarized in the progress report.

Insurance Coverage: The selected Consultant will be required to provide Errors and Omissions, Professional Liability Insurance in the amount of \$1,000,000 for this project as well as the other insurance coverage including Worker's Compensation.

The consultant shall carry, at a minimum, comprehensive or commercial general liability, personal injury, and property damage insurance in the amount of \$2,000,000 aggregate total for all claims arising out of a single accident or occurrence. The consultant shall include the City, its officers, agents, and employees as named insured on insurance policies issued for this project, or shall furnish an additional insured endorsement naming the same as an additional insured to the Consultant's existing public liability and property damage insurance.

The consultant shall carry, at a minimum, automobile liability in the amount of \$2,000,000 aggregate total for all claims arising out of a single accident or occurrence.

In addition, the consultant shall insure the work for 100 percent of replacement value for the life of the contract against all loss or damage by fire, theft, vandalism, and malicious mischief.

Before the contract is executed, the consultant shall furnish to the City a certificate of insurance for limits set out above which is to be in force and applicable to the project.

Contract Requirements: The successful Consultant will complete a City standard contract in the form of a *Professional Services Contract* which shall incorporate a contract, the Scope of Work, a list of tasks, a work schedule, and certificates of insurance. A sample of this contract form is attached for reference.

The City will issue the *Notice to Proceed* after the execution of the contract.

The contract shall not be assigned in part or in total and the Consultant shall be solely responsible for the work of sub-consultants.

Project Budget: Prospective Consultants shall clearly show and define which tasks they will perform for their proposed fee. Details shall include Consultant and sub-consultant staff hours for each task.

Proposal Instructions

The Consultant must submit a definitive proposal for the end results that are set forth in this RFP. The proposal must describe the intended performance of the Consultant on the activities prescribed and the resources to perform the activities. The selected Consultant must have demonstrated experience in this type of study. The professional staff necessary to conduct the required study must be available for timely response in preparing the Transportation System Development Charge (SDC) and Streets, Sidewalk, and Street Lighting Fee Study. The Consultant should have available a project manager with demonstrated skill in managing an interdisciplinary team.

The City expects the Consultant to maintain the same project manager and key team members through the duration of the project. Sub-consultants proposed by the Consultant shall be listed in the proposal.

Required Information: The proposal shall include, as a minimum, the following items:

1. The name of the person(s) authorized to represent the Consultant in negotiating and signing any contract that may result from this document.
2. A description of the organization, size, and structure of the Consultant's team.
3. A statement that the proposal includes all terms and conditions of the RFP.
4. A problem statement from the Consultant's viewpoint, the objectives of the proposed Consultant work, the Consultant's proposed methodology, and a work plan for completing the work. If the Consultant chooses to modify the objectives section, those modifications shall be explained. The Consultant should clearly define the assumptions behind the Proposal.
5. At least three (3) references of former clients with summaries or samples of previous work that demonstrate the Consultant's ability to conduct a study of this scope and magnitude.
6. A list of similar transportation SDC and City fee studies developed within the past five (5) years.
7. The name of the Consultant's project manager and the names of professional persons who will perform the work, a current resume for each, including a description of qualifications, skills, responsibilities, and the special knowledge material to this project.
8. A list of the tasks, responsibilities, and qualifications of any proposed sub-consultant(s).
9. A work schedule showing duration, dependency, and the dates of completion of the tasks necessary to meet the City's objectives.
10. Any Consultant proposed modification or addition to the objectives detailed in the proposal will be separately assigned resources to permit clear distinction between those items required for the requested proposal and the modified proposal.
11. After a Consultant has been selected, and a final project Scope of Work and Consultant Fee is being negotiated, the Consultant shall provide a current rate schedule for all consultant and sub-consultant team members who will be assigned to the project.
12. Provide a statement outlining the anticipated involvement of City staff.
13. Provide a schedule of the Consultant and sub-consultant staff hours associated with each task defined in the proposal.
14. A brief discussion of whether and how any work done on behalf of any other agencies within Washington County would affect the work to be provided to the City.

Evaluation Criteria

The proposals will be reviewed by a selection committee consisting of at least two City staff members and will be scored and ranked according to the following criteria:

- Introductory letter (5 points)
- Firm's capabilities (40 points)
- Project team (25 points)
- Project approach (30 points)
- Total Possible Points Awarded (**100 points**)

Protest Procedures

Proposers are directed to consult OAR 137-048-0240 for the protest procedures applicable to this solicitation.

Scope of Work Requirements

General Statement: The City of Sherwood provides transportation services to a current population of approximately 18,800. The City maintains approximately 77 miles of paved roadways within the City limits. The City recently updated its Transportation System Plan (TSP) which was adopted on June 17th, 2014.

The Transportation SDC portion of this study is intended to provide an evaluation of the existing system plans and conditions, and projected future needs for serving build-out within the City's UGB.

The Streets, Sidewalk, and Street Lighting Fee portion of this study is intended to provide an evaluation of the existing Streets, Sidewalks, and Street Lighting Fees, and determine the future operations and maintenance needs, costs, and revenue sources to amend and update these fees to meet the City's operation and maintenance plans and policy goals.

Public review of the study results and recommendations will be accomplished through a public informational open house, and work sessions and formal hearings before the City Council for final adoption.

Evaluate Current Plans, System Conditions, and Preliminary Alternatives:

Consultant shall review existing System Master Plans, reports, studies, codes, regulations, etc., provided by the City; prepare a final schedule, and hold a kick-off meeting with City of Sherwood staff. The City will provide to the selected Consultant a copy of the following documents (except as noted):

Sherwood Operating and Financial Data

- Current City budget.
- Transportation system maintenance reports.
- Three years accurate budget data showing real cash flow for both income and expenses.
- Operation and maintenance plans, yearly costs, and revenue sources for the past three years.

Master Plans

- City of Sherwood Transportation System Plan, adoption date June 17, 2014, prepared by DKS Associates
- City of Sherwood Transportation System Plan Project Cost Estimate Refinement Report, dated June 18, 2015, prepared by DKS Associates
- City of Sherwood Comprehensive Plan.

Maps

- Sherwood zoning map.

This information is also available for review on the RFP project webpage <https://sherwoodoregon.gov/bids>.

Executive Summary, Conclusions and Recommendations:

- Purpose – Present an explanation of why this Transportation System Development Charge (SDC) and Street, Sidewalk, and Street Lighting Fee Study is being prepared.
- Summary - Provide a summary of the findings for this Study.
- Conclusions – Provide a detailed list of the conclusions for the Study.
- Recommendations – Provide a detailed list of the recommended SDC's and Fees.

Sherwood's Existing Transportation System: Describe Sherwood's existing transportation system (streets, sidewalks, and street lighting) and include community, system infrastructure, regulatory and financial background.

Community Background – Briefly describe the customer base and land use; residential, commercial and industrial customers; political jurisdictions and agreements; population and a history of Sherwood's Transportation System.

Federal, State and Local Rules and Regulations – Provide a discussion of the Federal, State and local rules and regulations that relate to the transportation SDCs, and street, sidewalk, and street lighting fees.

Funding/Budget – Provide a description and discussion of Sherwood's existing funding mechanisms encompassing operations and maintenance (O & M) and capital improvements plan (CIP). Discuss the City's system development charge (SDC) and its inter-relationship with Washington County Transportation Development Tax (TDT).

Alternatives and Their Evaluation: Propose and evaluate transportation SDCs, and street, sidewalk, and street lighting fees alternatives that will meet the previously listed goals and will address future transportation demands, infrastructure needs, regulatory issues, and implementation. Each alternative proposed will include a detailed description, cost analysis, graphs and other appropriate material.

The Recommended SDC and Street, Sidewalk, and Street Lighting Fee Schedule: Describe the recommended SDCs, and street, sidewalk, and street lighting fees schedule of rates that will allow Sherwood to meet the goal of transportation services to our existing

and future users within the UGB.

Provide a “cash flow analysis” using the past three year’s audited financial statements as a basis. This analysis is to be projected out no more than ten years at current bond interest rates for both the transportation fund and the system development charge fund.

Implementation: Provide an implementation strategy for the recommended SDC and street, sidewalk, and street lighting fee rate schedule.

Details will include graphs, cost tables and description of sufficient detail to give the City information to schedule and plan phased improvements depending on demand and as areas are developed within the UGB.

Appendices: The Study appendices will include data, modeling results, reference list, maps, other reports, and any other material necessary to provide full background information relied upon in developing the SDCs and street, sidewalk, and street lighting fees recommendations. The appendices may be bound in a separate volume.

Final Review Process: Submit five (5) paper copies and one (1) electronic file in PDF format of the draft final study to the City for review and comment, meet with staff and present the draft final study, answer staff questions, and incorporate staff comments into the final study document.

Attend City Council Work Sessions, Public Open House, and City Council

Hearings: Consultant shall attend and present draft study findings and recommendations at the three (3) City Council work sessions and one (1) open house meeting. Consultant shall incorporate City Council work session comments into the study analysis. Consultant shall attend and present final study findings and recommendations at two (2) City Council public hearing meetings. Presentation of the Street, Sidewalk, and Street Lighting Fees findings and recommendations shall occur concurrently with presentation of the SDC Fees findings and recommendations at the City Council work sessions, public open house, and City Council public hearings.