



City of Sherwood Community Development Department

Request for Proposals (RFP)

Community Vision for the Comprehensive Plan Update

Introduction

The City of Sherwood is presently accepting proposals from qualified firms for the development of a Community Vision for the City's Comprehensive Plan. The Vision will be an aspirational document that relies on community preferences to describe Sherwood in the year 2040. To accomplish this task, the Sherwood Planning Department is seeking to hire a consultant to perform tasks outlined in the Scope of Work.

The City is undertaking this visioning process as one of the initial steps in updating its Comprehensive Plan. The input received from the community will be used to help identify topics of interest that will be addressed in more detail in the Comprehensive Plan. As such, a broad and representative public outreach effort that gains participation and input from the community is integral to the success of the project.

The funding for the Visioning presented in the scope of work is contingent on the Sherwood City Council passing a supplemental budget in early 2018.

SECTION 1: Proposal Submittal and Closing Date

The proposal must be received by the Sherwood Community Development Department by **5:00pm on January 5th, 2018**. Electronic proposals will be accepted. All electronic submittals will receive receipt of submission via email if received and accepted. Late proposals will not be considered and will be returned unopened to the sender.

Proposals should be addressed to:

Carrie Brennecke, Senior Planner
22560 SW Pine Street
Sherwood, OR 97140
brenneckec@sherwoodoregon.gov
(503) 625-4242

Section 2: Inquiries

Questions that arise prior to the deadline must be submitted in writing no later than 48 hours prior to the deadline and must be addressed to the Project Manager listed above. As appropriate, questions and answers will be provided to all the RFP recipients.

Protest of the contract award must be submitted within seven (7) days of the contract award or issuance of intent to award, whichever is sooner.

Section 3: Scope of Work (Please refer to the attached “Community Vision for the Comprehensive Plan – Scope of Work”)

Section 4: Request for Proposal

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

1. Project approach

The statement shall include an outline of the objectives and scope of the proposed project and shall describe the proposer’s approach to accomplishing the project.

2. Statement of Work and products to be delivered

A clear written statement of the services to be performed, the form they will take and what the final product or end result will be. A concise outline delineating the specific tasks to be performed, indicating what will be done, in what sequence and by whom should be provided.

3. Qualifications and Experience

Include resumes on each key person involved in the project with verifiable references as well as a description of the respondent’s organizational framework, specific resources, and any other information to demonstrate that the respondent can effectively and efficiently provide the requested product.

4. Cost proposal

The proposal shall provide an offer to undertake the project as proposed at a quoted cost. A rate schedule shall be provided in case of unanticipated change orders.

5. Project Timeline

A chart designed to illustrate the project schedule.

Section 5: Evaluation

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

1. Understanding the problem (20 pts)

The proposal will be evaluated based on the respondent's understanding of the nature of the project, chief issues, types of services necessary to accomplish the work, coordination issues and delivery of stated needs.

2. Project approach (30 pts)

This response will be evaluated to assess the approach that will be applied to accomplish the objectives set forth in the statement of work. This statement of approach must clearly outline how the work will be completed.

3. Individual capabilities and experience with similar projects (35 pts)

The project will be evaluated based on the experience and skills of the applicant and/or staff as they relate to this project, capacity to perform required tasks and knowledge and experience with local comprehensive plans.

4. Cost proposal (15 pts)

The proposal will be evaluated based upon the completion of the project in a timely fashion and a competitive cost.

City of Sherwood
SCOPE OF WORK
For a
COMMUNITY VISION FOR A COMPREHENSIVE PLAN UPDATE

Project Description

The City of Sherwood intends to develop a Community Vision that outlines a future vision of the Sherwood community in the year 2040 as it relates to the update of the City's Comprehensive Plan. Development of the Community Vision will be a precursor to a major update of the City's Comprehensive Plan. As such, community engagement that reaches all segments of the Sherwood Community and is consistent with Statewide Planning Goal 1 is integral to the success of the project.

The Community Vision should focus on obtaining community preferences and priorities in relation to comprehensive plan elements which are derived for the applicable statewide planning goals. A complete Comprehensive Plan update for Sherwood has not occurred since 1990. From a city of 3,000 residents in 1990 to a city of over 19,000 residents in 2016, Sherwood has grown very quickly at an average of 8% a year annual growth. The past 25 years have brought significant physical growth to Sherwood as well. In 1990, the city's physical size was less than half what it is today. During the last comprehensive plan update only a small fraction of Sherwood's residents and businesses resided in the city and the plan does not accurately reflect the vision and values of the current residents and business community given the dramatic growth of the community since the last update.

The City has undertaken a number of planning efforts in the recent years, including concept planning for a large area of Sherwood's urban reserve in "Sherwood West". Sherwood West is 1,291 acres of Urban Reserve designated land located west and north of the city. The Sherwood West Preliminary Concept Plan can provide context for issues the city is facing in relation to growth, land use and housing. Furthermore, the City is preparing a proposal for an amendment to Metro's 2018 Urban Growth Boundary for a portion of the Sherwood West area. For this proposal, the City is required to prepare a Housing Needs Analysis (HNA) for the 2018-2038 period. The City has also applied for a DLCD Technical Assistance Grant to prepare an Economic Opportunities Analysis (EOA) and a Housing Policy Recommendation for the HNA. Sherwood is anticipating completing the EOA and HNA by the end of 2018.

Estimated Visioning Start Date: **March 2018**

General Scope Work Assumptions

The following four categories in the Scope of Work outline the City's minimum requirements for respondents to address in their proposals. The City is open to additional project components and methodologies that have proven successful in community visioning efforts. The proposal should be clear in the specific tasks, hours, costs, schedule, and responsibilities (consultant vs. City staff) for each component and task in the scope of work. Following the selection of a consultant, the City expects for the consultant to meet with City staff and the Project Management Team (discussed in more detail the Scope of Work item #1) to assist in finalizing roles and priorities.

The City is aiming to complete work on the Community Vision within 7-8 months, and to complete a memo that outlines a strategy to incorporate the Community Vision into the Comprehensive Plan update within 9 months. **The City has an estimated budget of \$50,000-60,000** as well as 1.0 FTE of staff time for the development of the Community Vision, which includes a Senior Planner to serve as Project Manager. Proposals should assume that the City's Project Manager will be responsible for coordination and communication with the City Council, Planning Commission, and the project's committees (discussed further below), coordination of process/meeting logistics and support, and oversight of consultant work. Consultant expertise is needed for community engagement, committee meeting and event facilitation, marketing and branding, survey research, website/social media, and development of the Vision documents. The City is committed to developing a project-specific website that has the ability to incorporate a wide variety of social media platforms and engagement tools, which the City would host but for which it would require assistance in developing and managing.

1: Project Management and Identification of Roles

As noted, the City will have a Project Manager as part of the 1 FTE dedicated to the project, and will be responsible for coordination and communication with the City Council and committees, coordination of process logistics and support, and oversight of consultant work. The consultant will be responsible for the development of a community engagement program, meeting/event facilitation, marketing/branding, survey research, website/social media content, and development and graphic design of the Vision Plan documents (further requirements for these individual tasks are included later in this RFP). The proposal needs to be clear in identifying the consultant's role on specific tasks and the cost/deliverables associate with those tasks.

City staff is proposing that the following groups and committees will be involved in the visioning process, and has identified the anticipated consultant support that each group will require. Respondents are welcome to comment on the proposed structure based on their experience with other visioning efforts.

- **Project Steering Committee:** The Steering Team will guide the visioning process including helping to identify opportunities for community involvement, keeping the City

Council updated on the project, and reviewing work products. The Steering Committee will include staff from the Community Development Department, staff from the City Manager's Office and staff from other city departments as deemed appropriate. City staff will be responsible for supporting most of the Steering Team meetings, but respondents should budget for attending at least two meetings.

- **Citizen Advisory Committee:** The Citizen Advisory Committee (CAC) is designed to be the Statewide Planning Goal 1 citizen involvement advisory committee. This CAC will also serve as the Comprehensive Plan Citizen Advisory Committee. This committee will be recruited and appointed by City Staff prior to the commencement of work on the visioning. The CAC will be responsible for advising on the content and language of the Vision and helping with community outreach. The CAC will include representation from the City Council, Planning Commission, members from each elementary school area, members from urban growth areas, members representing senior or disabled residents, members from the business community, and members from the development community. The consultants will be responsible for supporting and facilitating the CAC meeting, and working with City staff to prepare materials for the meetings.
- **Project Management Team:** The Project Management Team will include staff from the Planning Department as well as the consultants. Regularly scheduled meetings, primarily by phone and as frequently as weekly, will serve to keep the process moving, gauge process, and identify short term tasks.

2: Stakeholder Identification, Outreach, and Community Engagement

The City's Project Manager and Steering Committee will assist the consultant with identification of and provide contact information for the diverse set of stakeholders in the Sherwood community that should be involved in the development of the Community Vision. The consultants will be responsible for developing and implementing an inclusive and creative community engagement process that is appropriate for a growing sub-burb of 19,000 residents that combines traditional engagement (community events, open houses, neighborhood meetings, etc.) with a robust website and social media presence. City staff, including the Project Manager, Planning Department staff and Community Services staff will be available to assist with community engagement.

The consultant should address how they plan to engage community members that are traditionally under-represented in visioning and planning efforts, including a summary of efforts that have been successful in other jurisdictions. The Steering Committee will review the proposed Public Engagement Plan and offer local insight and potential scope refinement.

The proposal shall include specific details on the number and type of proposed meetings/events, website and social media platforms, and other engagement /outreach tools, which will be summarized in a Public Engagement Plan. The proposal shall identify specific tasks that require assistance from city staff or Steering Committee members. Staff will be available to provide insight on topic areas of particular interest to the community in recent years. A preliminary list includes “missing middle” housing, trails, recreation, growth management, and community design guidelines.

Consultant Products:

- a. Public Engagement Plan that summarizes stakeholders, online and social media efforts, open houses, community meetings or events and other engagement efforts.

3: Development of the Community Vision

Working with the Steering Committee, the consultant will evaluate and analyze the information gained through the public engagement process to identify and develop a structure and important components for the Community Vision for the Comprehensive Plan Update. Working with the Project Manager and Steering Committee the consultant will be expected to draft a Community Vision document. The vision document will include identification of a vision statement, goals, and priorities for the community as well as recommendation on how the Vision can be incorporated into the comprehensive plan update and other future planning projects.

The vision statement should provide context and direction for the City’s Comprehensive Plan update, in regards to how the community envision Sherwood will grow and develop over the next 20-years. The consultant will support the Project Manager in presenting a draft Vision Statement to the Steering Committee and City Council, the consultant shall provide the City with the final document. The consultant is expected to provide graphic design services for the document. The City is seeking a document with a design and structure that will be easily accessible to the City website and easily understood by the community.

Development of the Vision should be based on the Oregon Visioning Model, or another proven model that achieves similar results, that is based on the following components:

- Background information that is easily understood and graphically oriented, incorporating data from recent city documents such as the Housing Needs Analysis, Economic Opportunities Analysis, Sherwood West Preliminary Concept Plan, as well as data from other city services;

- An identification of current trends and an assessment of community input regarding the city's direction and prospects when it comes to comprehensive plan elements, and potential changes to respond to community feedback;
- A methodology that synthesizes information collected through workshops, community events, online tools into topic areas for the vision, and a process for the community to review, revise, and ultimately validate the identified vision.

Consultant Products:

- a. Memo summarizing the major themes/categories of ideas identified during the public outreach process, and how these will be presented in Community Vision.
- b. Vision 2040 Document (Vision Statement, Goals, Priorities).

4: Development of strategy to incorporate the Community Vision into Comprehensive Plan Update

The consultant will prepare a memorandum that outlines a strategy for the incorporation of the Community Vision into the City's Comprehensive Plan update. It is anticipated the visioning process will identify a number of areas and concepts that will result in detailed discussion and policy additions and/or amendments in the Comprehensive Plan. The vision statement should be easily transferable to the vision statement of the Comprehensive Plan. The consultant shall also address how the identified ideas from the Community Vision can be conveyed into goals, policies and action items in the Comprehensive Plan. Specific actions that should be addressed in the comprehensive plan process shall be identified.

The consultant will prepare and present a draft memorandum to the Steering Committee for review and discussion. The City is seeking a document that will guide the comprehensive plan process.

Consultant Products:

- a. Memorandum on how to incorporate the Community Vision into the City's Comprehensive Plan update process.