



**REQUEST FOR PROPOSALS (RFP)**

For Concept Planning of approximately 1,291 acres in the City of Sherwood Urban Reserves (Sherwood West Concept Plan) and preparation of a citywide Housing Needs Analysis

**Submissions are due to:**

City of Sherwood Planning Department  
 Attn: Brad Kilby AICP, Planning Manager  
 22560 SW Pine Street  
 Sherwood, OR 97041

**Proposal’s must be received by 4:00 PM September 2, 2014**

**(Proposals received after this date will not be accepted. Faxed copies are not accepted)**

**Questions and requests for clarification must be provided in writing to:**

Brad Kilby at the address above or by e-mail at [kilbyb@sherwoodoregon.gov](mailto:kilbyb@sherwoodoregon.gov).

<i><b>RFP Schedule</b></i>	<i><b>Date</b></i>
<i><b>RFP Release</b></i>	<b>July 30, 2014</b>
<i><b>Pre-Proposal Conference*</b></i>	<b>August 14, 2014</b>
<i><b>Deadline for Questions</b></i>	<b>August 22, 2014</b>
<i><b>Proposals due to the City</b></i>	<b>September 2, 2014</b>
<i><b>RFP Interviews</b></i>	<b>September 11, 2014</b>
<i><b>Successful Team Announced</b></i>	<b>September 17, 2014</b>
<i><b>Proposal Negotiation Schedule</b></i>	<b>September 18 – September 30, 2014</b>
<i><b>Contract Execution</b></i>	<b>October 20, 2014 (Council Approval)</b>

\*Pre-Proposal Conference (optional attendance) will be held at the City Hall Community Room on Thursday, August 14, 2014 from 1:30 – 3:30 PM at 22560 SW Pine Street – Sherwood, OR

The City reserves the right to modify this schedule at its discretion. Notification of changes will be posted on the City website ([www.sherwoodoregon.gov/Sherwood-West](http://www.sherwoodoregon.gov/Sherwood-West)).

## **I. Introduction**

The City of Sherwood is a town located approximately 17 miles southwest of Portland, Oregon. With a population of approximately 18,575 and 4.5 square miles in size, Sherwood is known for its strong community, historic downtown, and top ranked schools. The City is consistently ranked as a great place to live by several publications including its current ranking as the 5<sup>th</sup> Best Small Town in America by CNN/Money Magazine.

The Planning Department for the City is seeking proposals from interested firms to assist in:

- Preparation of a housing study that looks at the City's needs today and over the next 20 year planning horizon.
- Developing a concept plan for approximately 1,291 acres just west of the existing City limits.

The City received a Construction Excise Tax (CET) grant from Metro in August 2013 to assist in funding a comprehensive concept plan for the urban reserve area and budgeted additional funds from the City to complete the Housing Needs Analysis.

## **II. Proposals**

The winning proposal will reflect the team's ability to provide a full range of technical expertise in long-range concept planning in a simple, easy to follow format. Consultants should submit proposals that outline:

- The project team and its strengths as it relates to the project,
- Highlights a process that results in an innovative plan with an out-of-the-box approach to the challenges faced by an edge city in transition,
- A significant and meaningful community participation plan that incorporate substantial opportunities for citizen participation throughout the process using a variety of methods,
- A narrative detailing the consultant's philosophy, technical expertise and approach, and
- The inclusion of team members with a proven track record of illustrating and explaining complex planning ideas to the general public through the use of public meetings, media campaigns, and presentation graphics.

A pre-proposal conference is scheduled for August 14, 2014 from 1:30-3:30. Proposers are encouraged, but not required to attend this meeting. The purpose of the meeting is to answer questions about the solicitation and to clarify any issues with the proposal. Failure to raise concerns over any issues at this opportunity or in writing before August 22, 2014 will be a consideration in any protest filed regarding such items that were known before that date.

### **III. City Project Manager**

Brad Kilby, AICP, the Planning Manager for the City of Sherwood will be the City's project manager and staff liaison to the consultant team. Unless authorized by the Project Manager, no other City official or employee may speak for the City with respect to this solicitation. The City will not be bound by any such information.

### **IV. Scope of Work**

Selected consultants shall have demonstrated expertise in concept planning, land use, transportation, economics, diversity, and housing. The timing of the project is not firmly set, but is intended to inform the Planning Commission and City Council in their discussions with Metro regarding the 2015 Urban Growth Boundary (UGB) expansion, and consists of:

1. A Housing Needs Analysis
  - a. Residential lands study
  - b. Existing Conditions
  - c. Housing mixes
  - d. Identification of needed policy updates
  - e. Reporting
2. A concept plan for approximately 1,291 acres (Sherwood West) that considers and addresses:
  - a. Land Uses
  - b. Utilities
  - c. Natural Resources
  - d. Parks
  - e. Schools
  - f. Essential Public Services (i.e. emergency services)
  - g. Transportation
  - h. A phasing plan intended to inform the City of the most orderly and efficient expansion of the City's Urban Growth Boundary

These plans must comply with Title 11 of the Metro Urban Growth Functional Plan, and all Statewide Planning Goals. The City maintains a working buildable lands inventory that will not be included in the scope of work. Deliverables for the project consistent with the minimum requirements of Title 11 and Goal 10 must be incorporated into the consultants proposed scope of work.

Suggested elements to the Scope of Work include, but are not limited to the following tasks:

- Agreeing to a Scope and Schedule
- Formation of a Public Involvement Plan/Strategy

- Setting vision and goals for the concept plan and the Housing Needs Analysis
- Stakeholder/Property owner identification
  - Formation of Technical Advisory Committee
  - Formation of Citizens Advisory Committee
- Outreach and Education
  - Used as an opportunity to provide the public with information regarding densities, mixed uses, housing types, resilient neighborhoods, connectivity, and urban amenities
- Dissemination of Information
  - Providing avenues for the public and supporting agencies to be involved including such measures as visual preference surveys, phone interviews, public outreach opportunities within the community, polling, etc.
- Analyzing existing plans, regulations, etc.
- Developing Evaluation Criteria
  - Preparation of an existing conditions report that focuses on the future needs for transportation, land uses, infrastructure, natural resources, housing, economics, schools, and parks for the City of Sherwood
- Preparation of Alternatives/Draft Reports
- Analyzing alternatives/reports
  - Identifying costs associated with each alternative
  - Identifying Impacts/opportunities/constraints associated with the alternatives
  - Draft phasing plan
- Implementation and Strategies
- Drafting final Concept Plan/Reports
  - Identifying needed amendments to existing City Comprehensive Plan. Development Code and Maps.
  - Drafting compliance reports for Title 11, Goal 9, and Goal 10 elements
- Adoption

Most importantly, the concept plan should highlight opportunities that are available to the City for growth in a manner that preserves the City’s values as a “small town” with a high quality of life. The intent is to develop long-range policies that provide clear and predictable guidance to citizens, developers, stakeholders, and City staff. The concept plan will serve as a working framework for future decisions in the City’s growth and should provide a clear road map for staff and the City Council that shows how to expand in a manner that is orderly, efficient, and economically sound.

#### **IV. Proposal Format**

Proposals must be limited to a maximum of 24 pages single-sided or 12 double-sided (one page is considered to measure 8 ½ inches by 11 inches), including attachments. The

proposal must include the following information:

1. **Introductory Requirements**
  - a. Letter of Interest (*2 page maximum*)

Proposals must include a letter of interest signed by an authorized representative of the consultant's company confirming the consultant's availability to accomplish this project and a commitment to complete the project in a timely manner.
  - b. Project understanding and approach (*3 pages maximum*)

A statement describing the consultant's understanding of the project and any special skills the consultant will bring to the project.
2. **General Information** (*3 pages maximum*)
  - a. Provide the following company information (Prime and Subs):
    - i. Firm name
    - ii. Business address
    - iii. Primary contact name, email and telephone number
    - iv. Year established
    - v. Type of ownership
  - b. Experience
    - i. Provide information on the consultant's background and experience on similar projects.
    - ii. Provide background of key members of each firm in the team that will be working on this project and their specific experience in previous projects that would relate to this project.
  - c. Potential or Perceived Conflicts of Interest
    - i. Any potential or perceived conflicts of interest must be disclosed.
3. **Project Approach, Schedule and Presentation** (*9 pages maximum*)
  - a. Provide a narrative detailing the consultant's philosophy and approach to complete the study as described.
  - b. Provide an overall project schedule including the timing of major tasks, progress reports, public participation events and draft reports.
  - c. Describe the consultant's ability to prepare and present information and recommendations to lay citizens, local appointed and elected officials, staff, and other interested stakeholders.
  - d. Describe deliverables for the overall project
  - e. Provide any additional information or approaches felt to be relevant to indicate the consultant's ability to successfully complete this project.
4. **Resumes** (*3 pages maximum*)
  - a. Provide resumes of individuals who will be working on the project. For each individual, describe their proposed role, the anticipated percentage of time they will be dedicated to the project, and list their relevant experience as requested in 2b above.
5. **References** (*2 pages maximum*)

- a. Provide references from at least three projects for which the consultant has provided similar services.
  - b. References are to include the name of a project contact along with their position, email address and telephone number.
  - c. Each reference is to include a description of the services provided to the client and the consultant's specific role.
6. **Project Costs** (*1 page maximum*)  
Expenses are to be broken down into line items showing the cost of each major task as well as the overall cost.

#### **V. Proposal Submittal Requirements**

An original, nine paper copies, and one CD or flash drive containing the entire submittal in PDF format copy of the proposal must be post marked by **4:00 PM, September 2, 2014**. Late submittals will not be accepted.

Submissions are to be mailed or hand delivered to:

The City of Sherwood  
Attn: Brad Kilby, Planning Manager  
22560 SW Pine Street  
Sherwood, OR 97140

#### **VII. Evaluation Procedure**

The City will form a selection committee to evaluate and score each of the proposals. Each proposal will be evaluated based upon the relevant qualifications and experience of the consultant. Staff will verify references, and the selection committee will conduct interviews of the top (3) teams with complete proposals. The proposals will be judged using the following criteria:

- 1) Does the firm or team proposal meet the prescribed proposal format and provide all of the requested information? **(5 Points)**
- 2) Does the firm or team have demonstrated experience and technical competence in similar projects? **(15 Points)**
- 3) Does the firm or team show sufficient capacity to provide the requested services? **(10 Points)**
- 4) Do key personnel possess the qualifications to be assigned to the anticipated projects? **(5 Points)**
- 5) Has the firm described its ability to achieve budget and project delivery goals for projects of similar complexity as described in the suggested Scope of Work? **(5 Points)**
- 6) Proposed approach to the suggested Scope of Work. Although the City has identified the general suggested scope of work, the consultant and their team is

- afforded flexibility toward their approach in an effort to spur innovative and creative strategies in achieving the best product for the City. **(40 Points)**
- 7) Are the firm or teams references from past clients favorable? **(5 Points)**
  - 8) Is the firm familiar with the local, regional, and state laws associated with the suggested scope of work? **(5 Points)**
  - 9) Estimated Cost of providing the services. **(10 Points)**

#### **VIII. Selection Process**

Based on the selection committee evaluation of the proposals, the top three (3) firms or teams will be invited to a 1 hour interview to be scheduled for the afternoon of September 11, 2014.

#### **IX. Acceptance or Rejection of Proposal**

The City reserves the right to accept or reject any and all proposals. The City also reserves the right to waive any informality or irregularity in any proposal. Additionally, the City may for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP process. The City reserves the right to negotiate project deliverables and associated costs. The City is not obligated to respond to any proposal submitted, nor be legally bound in any manner by the submission of the proposal.

## X. Questions

For questions regarding this RFP, please submit your questions in writing via mail or e-mail to Brad Kilby, AICP, Planning Manager at [kilbyb@sherwoodoregon.gov](mailto:kilbyb@sherwoodoregon.gov). Questions must be received no later than August 22, 2014. It is the consultant teams responsibility to assure they receive responses to questions if any are issued. Questions and answers to the proposal will be posted on the RFP website found at: [www.sherwoodoregon.gov/SherwoodWest](http://www.sherwoodoregon.gov/SherwoodWest).

## XI. Addenda

Addendums to the RFP, if any, will be posted to the project website. It is the responsibility of the consultant team to learn of the addendums, and ensure that the submitted proposals incorporate them.

<i>Criteria</i>	<i>Maximum amount of Points</i>
<i>Proposal</i>	5
<i>Demonstrated Experience and Technical Competence</i>	15
<i>Sufficient Capacity to complete the work</i>	10
<i>Key personnel qualifications</i>	5
<i>Demonstrated ability to complete the work on time and within budget</i>	5
<i>Proposed approach and SOW</i>	40
<i>References</i>	5
<i>Familiarity with local, regional, and state laws</i>	5
<i>Estimated Cost</i>	10
<b>TOTAL</b>	<b>100 POINTS</b>