



RFP No. BPS018

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

City of Portland, Oregon
May 16, 2011

REQUEST FOR PROPOSALS

for

Barbur Corridor Concept Plan

PROPOSALS DUE: June 3, 2011 by 4:00 p.m.

Envelope(s) shall be sealed and marked with RFP # and Project Title.

SUBMITTAL INFORMATION: Refer to PART II, SECTION B.3 (PROPOSAL SUBMISSION)

Submit Proposal to:

Jay Sugnet
City of Portland
Bureau of Planning and Sustainability
1900 SW 4th Avenue, Suite 7100
Portland, OR 97201

Refer questions to:

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Fax: (503) 823-7800
Email: jay.sugnet@portlandoregon.gov

GENERAL INSTRUCTIONS AND CONDITIONS

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS – The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

CITY SUSTAINABILITY OBJECTIVES – The City has a history of striving to be more sustainable in its operations and planning. Starting with the City's Sustainable City Principles (1994) the City has established a variety of policies to guide its work on sustainability, including: the Sustainable Procurement Policy, Green Building Policy, Climate Action Plan, and the Stormwater Management Manual (to view these and related City policies, go to the Portland Policy Documents Website: <http://www.portlandonline.com/auditor/index.cfm?c=26818>). As applicable to City procurement, these policies guide the City to buy products and services that reduce the City's negative environmental and social impacts, while maintaining fiscal health in the short and long term. As such, the City seeks to do business with firms that will actively contribute to the City's sustainability objectives.

ENVIRONMENTAL CLAIMS – Upon request, the vendor must provide and make publicly available verifiable evidence supporting every environmental claim made about the products or services provided to the City. Environmental claims for which verifiable evidence must be provided include any claim provided on products, product packaging, product or service sales literature and websites, and information provided to respond to this solicitation.

INVESTIGATION – The Proposer shall make all investigations necessary to be informed regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS – Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

CLARIFICATION OF REQUEST FOR PROPOSAL – Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal meeting, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the Request for Proposal given out by City bureaus, employees or agents to prospective Proposers shall not bind the City.

ADDENDUM – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

COST OF PROPOSAL – This Request for Proposal does not commit the City to pay any costs incurred by any Proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the Request for Proposal.

CANCELLATION – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

LATE PROPOSALS – Proposals received after the scheduled closing time for filing will be rejected for non-responsiveness and returned to the Proposer unopened.

REJECTION OF PROPOSALS – The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the City and a Proposer may be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been

scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers who are concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

CITY OF PORTLAND BUSINESS LICENSE – Successful Proposer shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS' COMPENSATION INSURANCE – Successful Proposer shall be covered by Workers' Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER – Successful Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM – Successful Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

LOCAL CONTRACTING – If the final evaluation scores are otherwise equal, the City prefers goods or services that have been manufactured or produced by a Local Business. The City desires to employ local businesses in the purchase, lease, or sale of any personal property, public improvements or services. The City wants the residents of the State of Oregon and SW Washington to benefit from optimizing local commerce and services, and the local employment opportunities they generate. [City of Portland [Resolution #36260](#)]

CONFLICT OF INTEREST – A Proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this Request for Proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other Proposer of the same request for proposals, and that the Proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

PUBLIC RECORDS – Any information provided to the City pursuant to this RFP shall be public record and subject to public disclosure pursuant to Oregon public records laws (ORS 192.410 to 192.505). Any portion of a proposal that the proposer claims as exempt from disclosure must meet the requirements of ORS 192.501(2) and ORS 192.502(4) and/or ORS 646.461 et seq. The fact that a proposer marks and segregates certain information as exempt from disclosure does not mean that the information is necessarily exempt. The City will make an independent determination regarding exemptions applicable to information that has been properly marked and redacted. Information that has not been properly marked and redacted may be disclosed in response to a public records request. When exempt information is mixed with nonexempt information, the nonexempt information must be disclosed.

If the City refuses to release the records, the proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the proposer in order for the proposer to take all appropriate legal action. The proposer further agrees to hold harmless, defend, and indemnify the city for all costs, expenses, and attorney fees that may be imposed on the City as a result of appealing any decision regarding the proposer's records. The Chief Procurement Officer has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

These Professional, Technical and Expert Services Request for Proposal "General Instructions and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.

PART I

CONTRACT REQUIREMENTS

SECTION A

GENERAL INFORMATION

1. INTRODUCTION

To create and enhance a vibrant city, the City of Portland Bureau of Planning and Sustainability (BPS) combines the disciplines of planning and sustainability to advance Portland's diverse and distinct neighborhoods, promote a prosperous and low-carbon economy, and help ensure that people and the natural environment are healthy and integrated into the cityscape.

BPS provides a forum for community engagement and education, and is a catalyst for action. With a city full of partners, BPS develops creative and practical solutions on issues as far ranging as comprehensive neighborhood and environmental planning, urban design, waste reduction and recycling, energy efficiency and solar technologies.

This innovative, interdisciplinary approach strengthens Portland's position as an international model of sustainable development practices and commerce.

2. BACKGROUND

In July 2009, Metro Council selected Highway 99W Regional High Capacity Transit (HCT) Corridor as a priority for near-term investment in its Regional High Capacity Transit System Plan. Highway 99/I-5 Corridor was also identified as one of the eight Mobility Corridors recommended for future Corridor Refinement Plans in the Draft 2035 Regional Transportation Plan (RTP). Barbur Boulevard is poised to become the recipient of significant federal and regional transportation dollars. The Portland region has a deep understanding that an investment of this magnitude is only in small part about our transportation goals; and largely about spurring and leveraging development potential to create great places. This understanding also acknowledges that the location of HCT combined with strategic local land use actions and investments will influence future capacity for residential development and employment in the region.

Residents and agencies have been working toward a vision for Barbur since outreach for the Southwest Community Plan (SWCP) began in 1994. Barbur was originally included in the SWCP study area, but was eventually excluded due to lack of consensus from adjacent property owners. The SWCP was adopted in 2001. Several changes have occurred since then that increase the need for a new look at the Barbur Corridor:

- Since 2001, the region has seen numerous HCT expansion projects (Red Line, Interstate, Green Line and Portland Mall MAX), none of which was located in southwest Portland beyond the Central City.
- Traffic has continued to increase in the southwest Metro area. With no parallel transportation network to spread out the mobility demand into the Central City, morning and afternoon congestion occurs more frequently and for longer periods of time.
- The general public has grown more supportive of a regional HCT network.
- In 2009, Metro Council adopted the Regional High Capacity Transit Plan which identified the Barbur corridor as the most pressing regional priority for HCT expansion.
- The Regional RTP updated Mobility Corridor Atlas identified the I-5/Hwy 99 corridor as a top priority for a Refinement Plan study to analyze the mobility demands of that corridor

Past Efforts

Chronology of Past Land Use, Transportation, and Watershed Planning work:

1991 Southwest Hills Resource Protection Plan (BPS)

1991 Barbur Corridor Study (PBOT)

1994 West Portland given Town Center designation on Metro 2040 Concept Plan

1996 “West Portland Town Center: Developing Partnerships for Planning and Implementation” (AGS Associates)
1997 “West Portland Town Center Study: Final Report” (PBOT and ODOT)
1999 Barbur Boulevard Streetscape Plan (PBOT)
2000 Southwest Community Plan (Visions, Policies and Objectives) (BPS)
2001 Southwest Community Plan Comp Plan Map and Zoning Map Changes (BPS)
2002 TSP (amendments in 2004 and 2007) (PBOT)
2005 Portland Watershed Management Plan (BES)
2009 Metro’s Regional High Capacity Transit System Plan: Barbur is selected as a Near-Term Regional Priority Corridor.

As the chronology of past planning work indicates, some previous plans have expressly focused on the study area while other related studies have had a broader Portland focus.

In 1991, Parsons Brinkerhoff conducted a study for the City of Portland’s Office of Transportation. The purpose of the study was to identify feasible alignments for further study of light rail transit (LRT) in the Barbur Corridor. A general assessment of the potential impacts and opportunities of two alignment options was conducted, including the potential location of transit stations.

The most recent comprehensive effort, the Southwest Community Plan (SWCP), which concluded in 2001, omitted new Comprehensive Plan designations and zoning for the Barbur Boulevard corridor. Because of community concerns and the large area that the SWCP covered, City Council deferred further land use and transportation planning to a future effort.

Development along the Barbur Boulevard corridor has continued since the adoption of the SWCP, but fundamental elements of the vision, specifically the pedestrian-oriented nodes and transit improvements, have not materialized. This is partly due to the complexity of the needed solutions, the costs associated with them and the needed cross-organization coordination. It is also due to the fact that the planning work to develop a regulatory foundation for development that would support this vision was never completed.

The SWCP did, however, adopt a vision and objectives that speak to the community’s desires for thriving commercial nodes along Barbur from Terwilliger Boulevard to the Tigard city boundary: “By 2020, these commercial nodes have evolved further into vital focal points for community activities and commercial and retail services, while retaining elements of their valued historical community character...The Barbur corridor is becoming a successful center for business and housing. With transit service and streetscape improvements, the area has attracted growing numbers of pedestrian-oriented retail and commercial services, as well as a variety of housing opportunities for people of all ages and income levels.” Further, the Plan lays out objectives that describe that corridors “are linear, but contain nodes - usually intersections - which are most appropriate for locating concentrated development”.

Although the majority of Barbur was omitted from the SWCP, the City did implement the Plan for the remainder of Southwest Portland. Implementation included new comprehensive plan and zoning designations that allowed for greater density in targeted areas.

Notably, the transportation related elements of the plan have not experienced the same impetus as other elements, although there are also examples throughout the plan area that reflect the vision in the Plan. An example is the Phase I streetscape improvements on SW Capitol Highway from Hillsdale to Multnomah Boulevard.

The SWCP also deferred planning for the only Town Center designation along the corridor that is within the Portland city limits – West Portland Town Center. In 1995, the City and ODOT were awarded a TGM grant to develop a land use and transportation concept plan

for the town center. The study evaluated three alternatives for future development and transportation infrastructure investments. The study recommends a town center that contains two nodes about a half mile apart – one located near the transit center on Barbur Boulevard and one centered on SW Capitol Highway at SW Alfred Street. Again, due to the complexities of the anticipated solutions, the lack of further dedicated planning efforts and neighborhood consensus, the improvements discussed in this 1995 Study have not been realized.

3. SCOPE OF WORK

The City of Portland, Bureau of Planning and Sustainability (BPS) is seeking proposals from individuals, firms, teams or consultants, hereafter called “Proposer(s),” with demonstrated experience in land use, urban design/landscape architecture, market analysis, and transportation planning and proposes to engage the successful Proposer to assist the City in the development of a Concept Plan for the Barbur Corridor from Portland’s Central City to the Tigard city boundary. The focus of the Concept Plan is threefold:

- ❖ Identify potential transit station areas with the greatest development and placemaking opportunities;
- ❖ Develop a vision for Barbur Boulevard, a highway ‘orphaned’ when I-5 was built; and
- ❖ Evaluate alternative transit station areas against watershed health goals and existing investment strategies.

The project will evaluate existing land use, circulation, and urban watershed and accessibility patterns within a public-involvement framework to determine the locations of potential station areas with the greatest capacity for development, connectivity, ridership and responsiveness to watershed health. The purpose is to optimize urban land use patterns and engage the community within a multi-agency long-term planning process. Commencing the Concept Plan project prior to the multi-modal transportation and transit infrastructure planning is crucial in ensuring the success of two concurrent projects: the I-5/Barbur Corridor Refinement Plan and the Southwest Corridor High Capacity Transit (HCT) Alternatives Analysis. The corridor refinement plan is tentatively scheduled to begin in mid 2011 and the Alternatives Analysis in late 2011/early 2012. The Concept Plan will set the framework for future comprehensive and zoning map amendments, transportation infrastructure improvements, and watershed management strategies.

This project is a planning level assessment of different land use scenarios, including mode split, trip production, and general capacity in street network, as well as a planning level assessment of Metro’s transportation modeling outputs specific to the Barbur corridor. This is not a transportation study.

4. PROJECT FUNDING

The anticipated cost for the services described herein is \$135,000.00. The Proposer’s proposal shall include the Proposer’s true estimated cost to perform the work irrespective of the City’s budgeted funds for this work.

5. TIMELINE FOR SELECTION The following dates are proposed as a timeline for this project:

Written proposals due at 4:00 p.m.	June 3, 2011
Announcement of short list Proposers	June 10, 2011
Interviews, if deemed necessary	June 17-23, 2011
Notice to proceed – work begins	July 8, 2011

The City reserves the right to make adjustments to the above noted schedule as necessary.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

The City, Metro and other agencies will work with the successful Proposer according to the objectives and methodology outlined below. Each method is assigned a responsible party or parties (**City, Successful Proposer, Metro and/or TriMet**). The successful Proposer is expected to work only on methodology item(s) where “Successful Proposer” is listed. The successful Proposer shall be expected to work closely with designated City, Metro and/or TriMet personnel, when referenced, to accomplish the tasks identified for the successful Proposer below:

Task 1 – Project Management

Objectives:

- Efficient management and coordination of all tasks.

Methodology:

- Manage the executed contract and budget. **City**

Task 2 – Public Involvement and Agency Coordination

Objectives:

- Design a broad-based public participation program reaching residents, businesses, the development community, and others.
- Participate in an agency coordination committee comprised of the project managers for the following projects: Southwest Corridor Refinement Plan, Tigard HCT Corridor Land Use Plan, Southwest Corridor Transit Alternatives Analysis, and efforts underway by the cities of Sherwood, King City and Tualatin.
- Coordinate public agency participation through a technical advisory group.
- Coordinate public involvement through a Community Working Group (CWG) comprised of citizen stakeholders.

Methodology:

- Design a comprehensive public outreach program in conjunction with a 15-20 member community working group (CWG). The group will likely meet approximately 15 times to provide input and advice on the planning process and project deliverables. **City and Metro**
- Coordinate a technical advisory group to engage key technical stakeholders from City Bureaus, ODOT, Trimet, Metro, City of Tigard, and technically focused advocacy groups not represented on the CWG. **City and Metro**
- Participate in a monthly agency coordination committee meeting with Metro, Trimet, ODOT and the cities of Tigard, Tualatin, Sherwood, and King City. This meeting will be convened and facilitated by Metro. **City and Metro**
- Attend and participate in no more than 15 CWG meetings, 8 Technical Advisory Group Meetings, 3 Community Forums, and 2 neighborhood walks. **Successful Proposer**

Task 3 – Existing Conditions

Objectives:

- Compile a comprehensive inventory of existing land use, local economic conditions, market trends, sub-basin watershed health, traffic patterns and transportation infrastructure for each station area.
- Define project study area.
- Establish a framework for planning through the review of public policies and plans previously completed for the Barbur Boulevard corridor.

Methodology:

- Compile an existing land use and zoning inventory including but not limited to vacant and underutilized lands, bus ridership, traffic patterns, traffic safety issues, existing transit facilities, sidewalks, bicycle facilities, traffic, stream corridors / crossings, and parking through the lens of public health and equity. **City and Metro**
- Compile area demographics. **City and Metro**
- Analyze current market conditions for retail and office. The retail market analysis will include a demographic profile highlighting market potential, supply and demand related to market leakage (money spent outside the general market area), surveys of existing businesses and customers to determine demand. The office market analysis will include, at a minimum, the supply of existing office, focus groups to determine current expansion needs of existing users, site analysis, and office development trends. **City**
- Update the Bureau of Environmental Services sub-basin analysis related to the ecological health of the watershed. **City**
- Analyze opportunities for stormwater management retrofits along the corridor, resource protection opportunities, and opportunities to form future Local Improvement Districts (LID). **City**
- Evaluate the geographic extent of the existing conditions data and determine areas of study and impact. **City**
- Review and summarize relevant state, regional and city public policies, plans, and previously completed studies and describe their impact on project study area. **City**

Task 4 – Needs, Opportunities, and Constraints Analysis**Objectives:**

- Identify the Needs, Opportunities, and Constraints of the corridor study area.

Methodology:

- Conduct a needs, opportunities, and constraints analysis for the Barbur corridor. **Successful Proposer**
- Identify Trimet transit engineering constraints for the corridor. **Trimet**
- Identify sites with greatest development potential, and identify environmental, economic, transportation, and social/public health/design issues. **Successful Proposer**
- Conduct outreach designed to inform the analysis using:
 - An Opt In survey of the community and “users.” **Metro**
 - Two community walks for each segment of the corridor. **City**
- Create an urban design diagram that identifies key conclusions from the existing conditions report and the needs, opportunities, constraints analysis as a communication tool for project partners and the community. **Successful Proposer**

Task 5 – Goal and Criteria Development**Objectives:**

- Develop project goals for nodal development pattern, defining neighborhood “placemaking” opportunities, the transit corridor and nodal areas.
- Develop criteria for selecting local transit supportive nodes and potential high capacity transit (HCT) station area locations.

Methodology:

- Review Metro’s *State of the Centers* and *Station Area Typologies* reports. **City**
- Review Metro’s Green Streets handbook for possible roadway typologies. **City**
- Review the City’s goals for watershed enhancement, land use, and transportation. **City**
- Identify a set of common characteristics for successful transit supportive pedestrian nodes (including HCT station area locations) specific to the Barbur corridor. **Successful Proposer**

- Develop high level corridor and nodal goals that optimally balance the economic, social/health/design, and environmental values of the community. **City**
- Analyze the needs, opportunities, and constraints analysis to identify opportunities for creating places. **Successful Proposer**
- Develop detailed criteria needed to evaluate nodal location alternatives. The criteria will at a minimum address issues related to watershed health, stormwater, urban design specific to density and transitions between nodes and single family neighborhoods, pedestrian safety, mobility, congestion, health, commercial vitality, infrastructure availability and connectivity across and along the transit corridor. **Successful Proposer**

Task 6 – Alternative Concept Development

Objectives:

- Identify alternative transit supportive nodal urban development concepts for the corridor.
- Explore alternative locations for local and HCT transit stations.
- Build scenarios for each location.

Methodology:

- Identify major and minor nodes (no more than seven) based on the potential for concentrations of new development. Major nodes imply suitability for more intensive office/retail/housing around HCT while minor nodes imply suitability for local transit service with less intensive housing and local serving retail. **Successful Proposer**
- Consider the role of different nodes in terms of market area potential compared to other locations in the City and region. **Successful Proposer**
- Create a typology of the corridor segments between the nodes that identifies similarities and distinguishing characteristics in terms of mix and intensity of uses. **Successful Proposer**
- Explore alternative numbers and locations of transit stations using the key characteristics, goals, and criteria developed in Task 5. **Successful Proposer**
- Explore street classifications and potential changes in traffic patterns from each nodal development alternative based on the urban development framework. **City and Metro**
- Using a variety of planning tools, identify building prototypes based on current entitlements and build development scenarios (no more than 3 each) for the corridor and individual nodes. **Successful Proposer**
- Using a variety of planning tools, test future scenarios based on changes to current entitlements and build development concepts for the corridor and individual nodes. **Successful Proposer**

Task 7 – Alternative Concept Analysis

Objectives:

- Evaluate the performance of the alternative nodal concepts.
- Analyze the nodal area location alternatives to explore where transit station areas would make the most difference.
- Analyze the mix and quantity of development types for each station area
- Select preferred station area locations.
- Evaluate the potential traffic impacts of each nodal alternative with the transportation access and circulation data from the Southwest Corridor Refinement Plan.

Methodology:

- Analyze the potential locations against the goals and criteria identified in Task 5 and use modeling tool to evaluate scenario performance. **Successful Proposer**
- Using economic and market analyses, Assess the mix and quantity of possible development types in each station area. **Successful Proposer**

- Review the transportation analysis to assess access and circulation needs for potential redevelopment scenarios in nodes and station areas. **City and Metro**
- Review the transportation analysis of impacts to transportation system to assess mobility impacts of the redevelopment scenarios. **City and Metro**

Task 8 – Concept Plan Development

Objectives:

- Consolidate data and analyses into a comprehensive report that recommends a long-term development strategy that includes a public and private investment strategy for the corridor and the location and number of transit stations.
- Identify stormwater management needs for the nodes and corridor, including best management practices.

Methodology:

- Prepare draft report for public review and comments. The report will have the following outline:
 1. History and policy context of the corridor including needs, opportunities, and constraints;
 2. Urban Design diagrams showing:
 - a. Locations of nodes and potential station areas with mix of land uses
 - b. Role of corridor segments, nodes, potential station areas, and stormwater management needs;
 3. Identification of actions to support public and private investment, including recommendations to amend Portland land use and transportation policies and regulations in concert with Metro’s Community Investment Strategy for the entire SW Corridor;
 4. Timing and priority among actions; and
 5. Consideration of alternative alignments from the SW Corridor Refinement Plan related to 3 and 4 above. **City**
- Tie stormwater management needs to future transportation investments identified in the Alternative Concept Analysis (e.g. managing stormwater at the source using vegetated facilities). **City**
- Conduct presentations to public, Metro Council, Portland Planning Commission, Portland City Council, and Trimet Board of Directors. **City**

2. WORK PERFORMED BY THE CITY, TRIMET, METRO, AND THE OREGON DEPARTMENT OF TRANSPORTATION

The City has assigned a project manager to oversee the successful Proposer’s work and provide support as needed. Specific duties the City will perform are included in the Section Technical or Required Services. The City project manager will ensure a high level of collaboration between the City, successful Proposer, and other project partners in the coordination of tasks, deliverables, and community outreach. The City is responsible for all aspects of community engagement, although the successful Proposer is expected to attend public meetings and represent their technical work.

3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. The successful Proposer is encouraged to provide any deliverables in accordance with the City’s Sustainable Paper Use Policy. The policy can be viewed at: <http://www.portlandonline.com/omf/index.cfm?c=37732> .

Deliverables and schedule for this project shall include:

Task 1 Deliverables:

1. Quarterly project progress reports and reimbursement requests. **Successful Proposer** due quarterly
2. Complete report including summary of cost, location of records, and list of final deliverables. **City** due February 28, 2013

Task 2 Deliverables:

1. Public Outreach Approach and Program. **City** due July 1, 2011
2. Convening of Community Working Group, Technical Advisory Group. **City** due July 1, 2011
3. Agendas and minutes from the community and technical advisory group meetings. **City** ongoing
4. Copies of public outreach materials. **City** ongoing

Task 3 Deliverables due December 31, 2011:

1. Existing conditions report including tables, maps, and descriptions of current land use, transit and transportation conditions, market conditions, demographic trends, and summaries of policies and previous planning efforts. **City**
2. Retail and office market analysis. **City**
3. Sub-basin analysis and opportunities analysis. **City**

Task 4 Deliverables due December 31, 2011:

1. Needs, Opportunities, and Constraints report and community walks. **Successful Proposer**
2. Results from the online survey. **City**
3. Urban Design Diagram. **Successful Proposer**

Task 5 Deliverables due June 30, 2012:

1. Goals for the corridor and transit stations. **City**
2. Criteria for selecting the location of transit stations. **City**

Task 6 Deliverables due November 30, 2012:

1. Alternative node and transit station descriptions and drawings with accompanying data tables. **Successful Proposer**

Task 7 Deliverables due November 30, 2012:

1. Summary report of the modeling results. **Successful Proposer**
2. Transportation access and impact analysis for redevelopment scenarios. **City, and Metro**

Task 8 Deliverables due February 28, 2013:

1. Draft and final report. **City**

The successful Proposer shall submit drafts of deliverables (3.2, 4.1, 4.2, 6.1, and 7.1) to the City for review and comment six weeks prior to the due date. The project manager will provide consolidated comments from City staff to the successful Proposer 4 weeks prior to the due date. The successful Proposer shall incorporate City comments into a draft for presentation to the Community Working Group according to the draft schedule in Exhibit C. Final products shall be due 2 weeks after the Community Working Group meeting in which the material is last presented.

All deliverables and resulting work products from this contract will become the property of the City of Portland. As such, the Contractor and any Subcontractors grant the City the right to copy and distribute (in any and all media and formats) project deliverables for regulatory, project certification/recognition, program development, public education, and/or for any purposes at the sole discretion of the City of Portland.

Unless otherwise specified by the City, all deliverables shall be submitted electronically in a mutually-agreed upon format. Any hard-copy deliverables specifically requested by the City shall be in bindings that are fully and easily recyclable, preferably using materials containing post-consumer waste (PCW) recycled content.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the successful Proposer's facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location or any combination thereof.

5. PERIOD OF PERFORMANCE

The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by January 18, 2013.

6. PUBLIC SAFETY

Public safety may require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such places and include the cost of delay in the proposed cost. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer's employees and agents to be escorted to and from any public office, facility or work site if national or local security appears to require it.

7. INSURANCE

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice, or a 10-day written notice for non-payment from the successful Proposer or its insurer(s) to the City.

Workers' Compensation Insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

General Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

Professional Liability Insurance with a combined single limit of not less than \$1,000,000 per claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract. If insurance coverage is provided on a "claims made" basis, the successful Proposer shall acquire a "tail" coverage or continue the same coverage for three years after completion of the contract, provided coverage is available and economically feasible. If such coverage is not available or economically feasible, contractor shall notify City immediately.

Certificates of Insurance: As evidence of acceptable insurance coverage, the successful Proposer shall furnish insurance certificates to the City at the time signed contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include a 30-day cancellation clause and a 10-day non-payment clause as identified above. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

SECTION C

1. INDEX

2. SAMPLE CONTRACT

ATTACHMENTS

Exhibit A	First Tier Subconsultant Disclosure Form (submit with proposal)
Exhibit B	City of Portland CET Grant Application
Exhibit C	City of Portland Draft Project Schedule

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067> .

PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING

There will be no pre-submittal meeting or site visit scheduled for this project.

2. RFP CLARIFICATION

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is May 27, 2011.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Jay Sugnet
Bureau of Planning and Sustainability
1900 SW 4th Avenue, Suite 7100
Portland, Oregon 97201

E-mail: jay.sugnet@portlandoregon.gov
Phone: (503) 823-5869
Fax: (503) 823-7800

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed **ten (10)** pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

3. PROPOSAL SUBMISSION

For purposes of this proposal submission, the proposer shall submit: one (1) original printed copy, four (4) additional printed copies, and one (1) unbound Redacted Copy. The entire proposal submittal must be received at the place and on or before the time and date specified on the cover page of this RFP document.

REDACTION FOR PUBLIC RECORDS: Any portion of a proposal that the proposer claims as exempt from disclosure must meet the requirements of ORS 192.501(2), ORS 192.502(4) and/or ORS 646.461 et seq. Proposers are required to submit a redacted copy of their proposal and all attachments. "Redaction" means the careful editing of a document to obscure confidential references; a revised or edited document thereby obscuring the exempt information but otherwise leaving the formatted document fully intact. **The redacted copy must be a complete copy of the submitted proposal, in which all information the Proposer deems to be exempt from public disclosure has been identified.**

When preparing a redaction of your proposal submission, a proposer must plainly mark, but leave readable, the redactions by highlighting the specific areas your firm asserts is exempt from public disclosure. In addition, a summary page identifying the pages where redactions occur shall be included with the proposal submission (summary is not included in page limitations). **If a proposer fails to submit a redacted copy of their proposal as required, the City may release the proposer's original proposal without redaction.** If the entire proposal is marked as constituting a "trade secret" or being "confidential", at the City's sole discretion, such a proposal may be rejected as non-responsive.

Unless expressly provided otherwise in this RFP or in a separate written communication, the City does not agree to withhold from public disclosure any information submitted in confidence by a proposer unless the information is otherwise exempt under Oregon law. The City agrees not to disclose proposals until the City has completed its evaluation of all proposals and publicly announces the results.

Please refer to the GENERAL INSTRUCTIONS AND CONDITIONS for more information about confidential information within public records.

4. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). Responses must follow the format outlined in this RFP. Additional materials in other formats or pages beyond the stated page limit(s) may not be considered. The City may reject as non-responsive, at its sole discretion, any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposal responses shall be organized in the following manner:

1. Cover Letter
2. Project Team
3. Proposer's Capabilities
4. Project Approach and Understanding
5. Diversity in Employment and Contracting Requirements
6. Proposed Cost
7. A completed First Tier Subconsultant Disclosure Form (refer to Part II.C.5)

SECTION C

EVALUATION CRITERIA

1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP) and the Standard Contract Provisions of the Professional, Technical and Expert Services contract.

The Cover Letter must include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations

- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email address
- statement that no redactions are requested, if applicable

A legal representative of the Proposer, authorized to bind the Proposer in contractual matters must sign the Cover Letter.

BUSINESS COMPLIANCE

The successful Proposer(s) must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer

The successful Proposer(s) must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of certification requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com/omf/purchasing>. To apply for certification go to our website at: www.ebidexchange.com/cityofportland.

Non-Discrimination in Employee Benefits (Equal Benefits)

The successful Proposer(s) must be in compliance with the City's Equal Benefits Program as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of compliance requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: www.portlandonline.com. To apply for certification go to our website at: www.ebidexchange.com/cityofportland.

Business License

The successful Proposer(s) must be in compliance with the City of Portland Business License requirements as prescribed by Chapter 7.02 of the Code of the City of Portland prior to contract award. Details of compliance requirements are available from the Revenue Bureau License and Tax Division, 111 SW Columbia Street, Suite 600, Portland, Oregon 97201, (503) 823-5157, website: <http://www.portlandonline.com/omf/index.cfm?c=29320>

If your firm currently has a business license, is in compliance with the Equal Benefits Program, and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number, a statement that your firm's Equal Benefits Application has been approved as well as your Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM

- Approximate number of people to be assigned to the project.
- Extent of company's principal member's involvement.
- Team qualifications and experience on similar or related projects:
 - qualifications and relevant experience of prime consultant
 - qualifications and relevant experience of sub-consultants, if any
 - project manager's experience with similar projects
- Names of key members who will be performing the work on this project, and:
 - their responsibilities on this project
 - current assignments and location
 - experience on similar or related projects
 - unique qualifications
 - percentage of their time that will be devoted to the project

3. PROPOSER'S CAPABILITIES

- Describe similar projects performed within the last 10 years, which best characterize firm's capabilities, work quality and cost control.
- Describe similar projects with other government agencies.
- Describe firm's resources available to perform the work for the duration of the project and other on-going projects.
- Describe firm's internal procedures and/or policies associated or related to work quality and cost control.
- Describe firm's management and organizational capabilities.

4. PROJECT APPROACH AND UNDERSTANDING

- Describe the proposed work tasks and activities, the methodology that will be used to accomplish them, and identify the team members who will work on each task.
- Describe the proposed work products that will result from each task or activity.
- Identify points of input and review with City staff.
- Identify the time frame estimated to complete each task.

5. DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City is committed to increasing contracting opportunities for State of Oregon certified minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts. The City has assigned at least 15% of the total points available on this solicitation to this criterion to determine the award of this contract.

All Proposers shall address the following in their proposals:

- a. Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB). Provide a copy of the State of Oregon certification letter confirming receipt of application, or a copy of the approval letter certifying your firm as a State of Oregon M/W/ESB (a copy of this letter does not affect the page-limit identified under Part II, Section B.2 of this document).
- b. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
 - Number of total employees and description of type of work performed.
 - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
 - Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
 - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
 - Description of the process your firm uses to recruit minorities and women.
- c. Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
 - List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
 - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
 - Any mentoring, technical or other business development services your firm has

provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.

- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of State of Oregon certified M/W/ESB firms on this project. Include in your response:
- Subcontracting opportunities your firm has identified in the scope of this project.
 - Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
 - Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
 - Other efforts your firm used or proposes to use in relation to this project.
- e. If your firm will be utilizing State of Oregon certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal. In addition, **all Proposers must submit Exhibit A - First Tier Subconsultant Disclosure Form 1** with their proposal, which requires Proposers to identify the following:
- The names of **all** subconsultants to be used on this project with subcontracts greater than or equal to \$10,000.
 - The names of all State of Oregon certified MBE, WBE and ESB firms. If firms have more than one certification (i.e., ESB and MBE, and/or ESB and WBE) note that on the form so that proper credit can be given for the ESB goal and for tracking MBE and WBE utilization.
 - The proposed scope or category of work for each subconsultant.
- If Proposers will not be using any subconsultants that are subject to the above disclosure requirements, Proposers are required to indicate "**NONE**" on the First Tier Subconsultant Disclosure Form 1.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals. The City will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer, and the successful Proposer will be required to submit a completed Monthly Subconsultant Payment and Utilization Report to ensure that subconsultants are utilized to the extent originally proposed and submitted in its proposal. The successful Proposer will not be permitted at any time to substitute or add a subconsultant without the prior written approval of the Chief Procurement Officer. ALL subconsultants, including M/W/ESB firms, and first tier subconsultants shall be reported on the Monthly Subconsultant Payment and Utilization Report as well as contract amounts and payments. For reference, a copy of this form may be obtained at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=119851> .

6. PROPOSED COST

This statement shall specify the number of hours each staff member will work on each task. The proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's anticipated cost.

PART III

PROPOSAL EVALUATION

SECTION A

PROPOSAL REVIEW AND SELECTION

1. EVALUATION CRITERIA SCORING

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

	Criteria	Maximum Score
a.	Cover Letter	0
b.	Project Team	15
c.	Proposer's Capabilities	25
d.	Project Approach and Understanding	25
e.	Diversity in Employment and Contracting	15
f.	Proposed Cost	20
	Total Points Available	100

2. PROPOSAL REVIEW

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals, each committee member will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in the evaluation process.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of five (5) working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the oral interviews.

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

NOTE: In the City's discretion, litigation between the City and a Proposer may be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers who are concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

3. CLARIFYING PROPOSAL DURING EVALUATION

At any point during the evaluation process, the City is permitted, but is not required, to seek clarification of a proposal. However, a request for clarification does not permit changes to a proposal.

SECTION B

CONTRACT AWARD

1. CONSULTANT SELECTION

The City will attempt to reach a final agreement with the highest scoring Proposer. However, the City may, in its sole discretion, terminate negotiations and reject the proposal if it appears agreement cannot be reached. The City may then attempt to reach a final agreement with the second highest scoring Proposer and may continue on, in the same manner, with remaining proposers until an agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

2. CONTRACT DEVELOPMENT

The proposal and all responses provided by the successful Proposer may become a part of the final contract. Any information included as part of this contract shall be a public record and not exempt from disclosure, including items redacted from the proposal. The form of contract shall be the City's Contract for PTE Services.

3. AWARD REVIEW AND PROTESTS

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret or confidential and meeting the requirements of ORS 192.501, 192.502 and/or ORS 646.461 et seq., will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS:

Protests may be submitted to the Chief Procurement Officer only for formal solicitations resulting in contract(s) individually valued at or above the Formal Solicitation Process Dollar Threshold (reference www.portlandonline.com/omf/index.cfm?c=44169&a=74585), and only from those Proposers who would receive the contract if their protest was successful.

Protests must be in writing and received by the Chief Procurement Officer within seven (7) calendar days, UNLESS OTHERWISE NOTED, following the date the City's Notice of Intent to Award, Notice to Short List, or notification for non-responsiveness was issued. The protest must specifically state the reason for the protest and show how its proposal or the successful proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. No contract will be awarded until the protest has been resolved.

Protests must be timely and must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Chief Procurement Officer may waive any procedural irregularities that had no material effect on the selection of the proposed contractor, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Chief Procurement Officer shall issue a notice canceling the Notice of Intent to Award.

Decisions of the Chief Procurement Officer are final and conclude the administrative appeals process.

EXHIBIT A

CITY OF PORTLAND PROFESSIONAL TECHNICAL & EXPERT (PTE) SERVICES FIRST TIER SUBCONSULTANT DISCLOSURE FORM

CITY PTE DISCLOSURE REQUIREMENTS

The City's disclosure program was adopted to document the use of subconsultants on City projects over \$100,000; particularly Oregon certified Minority, Women and Emerging Small Businesses (M/W/ESBs).

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first-tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about such subconsultants:

- 1) The subconsultant's contact information and Employer Identification Number (EIN or FED ID#)
- 2) State of Oregon M/W/ESB designation
(Verify certification status with the Office of Minority, Women and Emerging Small Business at <http://www4.cbs.state.or.us/ex/dir/omwesb/>)
- 3) The proposed scope or category of work that the subconsultant will be performing
- 4) The amount of the subconsultant's contract

If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "**NONE**" on the accompanying form.

ATTACHMENTS: Form 1: City of Portland PTE First Tier Subconsultant Disclosure Form

**CITY OF PORTLAND
PTE FIRST TIER SUBCONSULTANT DISCLOSURE FORM
(FORM 1)**

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about that subconsultant. Enter the specific expected dollar value for each sub-consultant (NOT acceptable to use > or < symbols).

Proposer Name: _____

Proposer's Total Cost: _____

RFP Number: _____

Project Name: _____

SUBCONSULTANT INFORMATION (Please Print)	M/W/ESB	SCOPE/TYPE OF WORK	SUBCONTRACT AMOUNT
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$
Firm Legal Name: Phone #: Fax#: FED ID OR EIN (No SS#):			\$

NOTE:

- 1) If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "NONE" on this form.
- 2) All subconsultants with contracts \$10,000 or over must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed certified through the *State of Oregon Office of Minority, Women and Emerging Small Business*: <http://www4.cbs.state.or.us/ex/dir/omwesb/>.
- 3) Do not enter social security numbers on this form. The City will do a follow-up to collect this info.