

June 13, 2013

Christina Robertson-Gardiner
Planner
City of Oregon City
Community Development Division
PO Box 3040
221 Molalla Avenue
Oregon City, Oregon 97045

Re: Willamette Falls Legacy Project: Walker Macy Team Scope Of Work

Dear Christina,

Willamette Falls is a national treasure that embodies centuries and generations of reverence and use. The vision established by the Willamette Falls Legacy Project must be commensurate with the tremendous power of this place, as this region sets a course for the next century. As Oregonians who are invested in the quality of our state's most beloved public spaces and successful communities, we consider this the opportunity of a lifetime.

Our plan will seek out the essence of this place and create authentic and sustainable solutions that draw upon the best thinking of the local community and stakeholders. We will continue to be guided by Four Core Values; Public Access, Economic Redevelopment, Habitat Restoration and Historic Preservation and Cultural Interpretation.

Our approach is built upon your work to date, and will achieve a Vision Strategy that will inspire current and future generations to continue to enhance and protect this invaluable resource of our state and a land use application that determines a development-ready zone for the site;

The community engagement in this scope of work outlines the strategy to engage with a wide diversity of essential stakeholders in the development of the plan. This scope focuses on engagement of the wider regional community with up to 40 community conversations, three Partners Summits, three Community Interactive Events, one regional event, content production for key messaging materials for web, social media, press releases, and newsletters throughout the process, as well as supporting staff with kits for speakers' bureaus, festival tabling and site tours. This plan will ensure the engagement of local as well as regional stakeholders in the visioning and will cultivate community champions through openness, transparency, and identification of shared values to see the vision through to the future.

The following scope of work is prepared according to current understanding of site conditions, ownership and public goals and has been refined with the assistance of a number of public partners to best meet the requirements of an initial Planning Commission Hearing on April 24th, 2014 in support of a zone change and comprehensive plan amendment for the former Blue Heron mill site. This scope is subject to administrative change within the overall budget of \$500,000 and will be revisited at the end of each project phase to ensure that it best meets the ongoing needs of the City and consultant team. Additional funds for this study are not anticipated but will be subject to City Commission approval.

Project Management Structure

Core Consultant Team

Walker Macy (Prime), GBD Architects, Cogan Owens Cogan (Public Engagement), Winterbrook (Land Use Planning), ECONorthwest (Economics and Market Studies), Loci (Development Feasibility)

Consultant Technical Team

KPFF (Civil and Structural Engineering), Flowing Solutions (Water Resources), George Kramer (Historian), HRA (Archaeology and Cultural Resources), DKS (Traffic Engineering and Transportation Planning), ESA (Natural Resources) and Turner Construction (Cost Estimates)

Project Management Team (PMT):

The Project Management Team for this project, consisting of Christina Robertson-Gardiner, Tony Konkol, Catherine Comer (Clackamas County), Ray Valone (Metro), trustee or representative and Core Walker Macy Team members, will hold a weekly standing meeting to ensure continuous coordination and close communication. These meetings will be conducted in Walker Macy's offices so that all of the planning tools are available during the discussion. Project Manager Ken Pirie will also coordinate on an ongoing, regular basis with the Oregon City team.

Partners Group:

The Partners Group will convene three times for Summits during this process to provide input, review draft work and guide the project's implementation. The PPG will include two elected officials from the following:

- City of Oregon City Commission
- Metro Council
- Clackamas County
- State of Oregon
- Trustee or Trustee representative
- Executive Leadership as appropriate

Technical Advisory Committee (TAC):

TAC will include representatives of the following agencies and groups:

- Oregon City, including Public Works, Parks and Clackamas County Fire District 1
- Clackamas County
- Regional Solutions Office
- Portland General Electric
- Department of State Lands
- Department of Environmental Quality
- Department of Land Conservation and Development
- Oregon Department of Transportation
- Oregon Department of Fish and Wildlife
- Oregon Parks and Recreation Department
- State Historic Preservation Office
- Army Corps of Engineers
- Metro
- Port of Portland
- City of West Linn

Project Assumptions

1. There are a number of documents that have been prepared to date relating to the Willamette Falls area. This project will not replicate this preceding work and will utilize as much of the existing information as is relevant. Key background documents are listed at the following web link:
<http://www.orcity.org/communitydevelopment/wflp-background-information>
2. The City of Oregon City has dedicated staff available to support the team, particularly for Public Engagement efforts and administrative needs. City staff will coordinate invitations and publicity for all Community Conversations, Partners Group, Stakeholder Summit and Open Houses.
3. The City can make prints and copies of meeting materials, to minimize consultant costs.
4. This scope of work addresses analysis and visioning for a 23-acre site but will consider the Willamette Falls and approximately ½-mile of Willamette River frontage north and south of the site, including a private dock and the Z-shaped PGE parcel that is within and directly adjacent to the Blue Heron parcel. Note that the public discussion of potential development of the PGE parcel is dependent upon any conditions that PGE may wish to impose prior to the first public meetings on this element.

Scope of Work

PHASE 1: PROJECT START UP

- 1.1 The Walker Macy Team and Oregon City project managers will confirm this project scope and create a detailed project schedule that results in the first Planning Commission hearing for the project by April 24, 2014. This scope includes a public involvement plan integrated with the planning process and a clear path to preparing the General Development Plan land use submittal in early 2014 to meet the April 24th deadline.
- 1.2 Kick-off meeting with the PMT that will continue to serve as the ongoing oversight for this project. This kickoff will serve to introduce the consultant team, confirm goals and emphasize key target dates.
- 1.3 Kickoff interview with the Trustee, separate from the PMT, to accurately gauge their positions and interests
- 1.4 Kickoff Community Engagement Design Meeting (3 hours). At this meeting we will: review the draft public engagement and public relations/messaging plan; discuss roles and responsibilities; project brand, logo, key messages, and graphic materials for all project materials; identify and assign process for website and social media creation/management; and review the existing list of potential stakeholders and confirm their points of involvement through this process. City to organize stakeholder groups by interest and core value prior to kick-off meeting. City to identify groups for community conversations. Consultant to provide format and to create separate community conversation management list. City staff will provide summary notes of these and other team meetings.
- 1.5 Coordinate interviews with selected TAC members to summarize available background information and critical technical issues to consider in this project
- 1.6 Walker Macy will ensure that team members obtain all relevant reports through the establishment of a shared FTP/Project Management website, with file folders created to organize and store background materials and technical references. Secured access protocol will be established with PMT.
- 1.7 Walker Macy will create a base map with GIS and CAD for the team's use throughout the project.
- 1.8 At two weekly meetings (2 hours each) with the PMT consultant will lead discussions to finalize project brand, logo, as well as key messages for project information, posters, website, social media, and surveys. Products will be developed through two review iterations (Draft 1, review, Revision, review, Final). City will consolidate comments for Consultant review. Outcomes of meetings will include: website domain name (i.e. "rediscoverthefalls.com"), finalized key messages, finalized logo and project brand to use on all printed and digital materials for the project.
- 1.9 Consultant to create community conversation (also known as Speakers' Bureau) kit: to include: a) preparation checklist, b) suggested agenda, c) facilitation tips, d) comment form, e) follow-up process, f) power-point with video (excerpt of PGE video if allowed) g) boards, h) fact sheet. Kits to be completed by July 10.

Consultant to create site tour kit to include a) prep checklist, b) facilitation tips, c) key messages to share during tour, d) comment card, e) fact sheet. Kits to be completed by July 10.

Consultant to create festival table kit to include a) prep checklist, b) facilitation tips, c) boards, d) comment form, e) fact sheet. Kit to be completed by July 10.

- 1.10 City to develop website for project. Consultant to provide layout template and content. Content for web to be provided at minimum one time prior to each event and one time post each event for blog posts, and weekly for links to social media.
- 1.11 Video development. Develop draft and final scripts for documenting a) video of the vision process as well as b) a short 2-3 minute final “viral” video format for Willamette Falls. Work with Willamette Falls TV and/or private production company to arrange footage, editorial review and final copies.
- 1.12 Develop communications plan to include all media strategies and objectives.
- 1.13 Work with PMT to create questions for brief introductory Metro Opt-In survey.

PHASE 1 Meetings

- Kickoff coordination meeting with PMT
- Kickoff meeting with Project Partnership
- Kickoff complete consultant team meeting
- TAC Interviews
- Kickoff engagement coordination meeting (#1) with PMT, Metro and Clackamas County
- Two branding/logo meetings (to be held during weekly meeting session, partners to be invited)

PHASE 1 Products

- Final Community Engagement Plan and Schedule
- Community Conversation / Speakers’ Bureau kits
- Site Tour and Tabling kits
- Final project brand and logo (developed through two review iterations with project team: Draft 1, review, Revision, review, Final)
- Key project messaging language
- Final scope of work and project schedule
- Updated work plan and schedule for Phase 2
- Meeting notes (Community Conversation notes will be maintained by the City of Oregon City)
- Opt-in Survey draft questions; final review draft (Survey summary will be created by Metro consultant)
- Base map(s)

PHASE 1 public engagement: City of Oregon City Responsibility

- Develop stakeholder list organized by values prior to June 10 kick-off meeting
- Collect and coordinate materials from project partners prior to June 10 kick-off meeting
- Maintenance and upkeep of Speakers' Bureau and Site Tour kits.
- Compilation and consolidation of community conversation comments.
- Website development and maintenance
- Social media (Facebook, Twitter, Instagram, etc.) maintenance
- City to print and make copies for printed materials (up to size 11x17) as well as plotting of Boards associated with Speakers' Bureau, Site Tour, and other presentations.
- City to administer master community conversation list
- Participate in survey development for Metro Opt-In, 2 rounds of revision, lead consolidation of comments from partners for consultant.
- City to provide Community Conversation meeting summaries (notes)
- Consultant to compile and track list of earned and purchased media outlets

PHASE 1 public engagement: Consultant Responsibility

- Consultant to create 10 Community Conversation/Speakers' Bureau Kits
- Consultant to create 1 Table-kit for events
- Consultant to create 1 Site Tour kit (folder)
- Consultant to provide template and content for website
- Consultant (tbd) will provide graphic logo/brand for project
- Consultant to provide content for all social media, website, and media (earned and purchased) – at minimum once pre and post each event for website updates, weekly for social media, and once prior to each event for purchased/earned media
- Consultant to advise on purchased media strategy
- Lead development for Opt-In Survey, 2 rounds of revisions
- Consultant to oversee master community conversation list, City to administer on daily/weekly basis

PHASE 1 Schedule

Scope of Work Complete by June 12

Kickoff Meetings to be scheduled for late June and early July, complete by July 15

PHASE 2: ANALYZE AND SUMMARIZE BACKGROUND INFORMATION

2.1 Conduct Site Visits with specific agendas for each :

- 3 Core Team and PMT Site Tours, one in Phase 2 (as part of TAC tour in Task 2.9), one at Phase 3 and another at Phase 5 of work process.
- Up to 2 total technical site visits as needed by technical resource team, accompanied by select core team members, to confirm initial review of information
- 2 Site Visits by Core Team for refinements of concepts (one in Phase 4 and one in Phase 5).

- One Core Team Tour of West Linn mill and PGE plant (if possible)
 - One meeting on site with NRI upon their pending departure to understand the property's current conditions.
 - Stakeholder group Site Tours will be conducted by the City of Oregon City. Walker Macy will provide graphic content on project progress as needed for these tours
- 2.2 Technical team members will prepare talking points for use in an illustrated brochure, (featuring each Core Value, up to 8 pages, prepared by Walker Macy), to identify key background research to date, key planning concepts and precedent projects.
- 2.3 Technical information will also be conveyed verbally by invited technical team members at targeted team work sessions. Key topics will include:
- Hydrological interests and issues (including DSL requirements, greenway regulations and implications for the Land Use submittal)
 - Stormwater treatment
 - PGE interests, easements and issues
 - Railroad parameters such as easements, setbacks and ROW widths
 - Contamination locations and issues
 - Habitat elements, including endangered or sensitive species at the site
 - Cultural importance of the falls and specific site elements related to historic archaeology
 - Archaeological and Historic considerations. Review potential for reuse/rehabilitation, determine eligibility potential for funding (e.g., tax credits), and identify elements that could be incorporated into the overall "site story."
 - Consider other site structures potential for recycling, reuse or adaptation
 - Potential title and water rights issues. Team will highlight areas of concern.
- 2.4 Prepare a set of diagrams and maps that summarize existing information in a graphic format. This will include context maps, including a regional trails map.
- 2.5 Prepare diagrammatic plans of existing structures including basements, general structural capability and capability to be modified.
- 2.6 DKS will prepare a review of preliminary transportation off-site impact and mitigation measures for the purposes of a Multimodal Mixed-Use Area (MMA) designation. This will include:
- Determine extent of initial MMA boundary based on ability to deliver required findings in support of MMA designation.
 - Review the location and quality of site access for all travel modes including highway crossings
 - Show areas where current transportation facilities do not comply with City or Regional guidelines (based on prior studies) and suggest areas to explore solutions
 - Identify applicable parking standards and available supply in downtown (based on prior studies)

- Compilation of relevant operational and safety issues within the interchange area, as needed, for MMA depending on proximity to I-205 (largely available from past studies)
 - Transportation work will include coordination with City staff, DLCD and ODOT in a work session
- 2.7 KPFF will take an aerial photo provided with X marks and capture the actual ground elevation and location and place into project CAD file. (Approximately 25 points.) KPFF will utilize elevations of any nearby owner provided exterior building flood marks to truth the air photo data. KPFF will also locate how far horizontally the lower FEMA elevation is from the X marked point riverward by taking a grade shot down hill at the FEMA flood elevation. Key team members will meet to coordinate this work prior to the survey site visit.
- 2.8 Conduct a preliminary, baseline market review to clarify development opportunities and limitations, with a general analysis of regional and local market conditions and discussion of long-term demographic trends and market opportunities and barriers.
- 2.9 Oregon City will coordinate with the Governor's office to appoint a person to make government to government connections with the Confederated Tribes of Grand Ronde, the Confederated Tribes of Warm Springs, the Confederated Tribes of the Umatilla Indian Reservation, the Confederated Tribes of Siletz Indians, and the Confederated Tribes and Bands of the Yakama Nation to meet and invite them to participate in the planning and visioning process. Consultant to assist with materials development and coordinate integration of Tribes into project process. Partnership staff will accompany appointed tribal liaison to all meetings. Consultant to meet designated point person to review materials.
- 2.10 Consultant will provide oversight for formal invitation letter to Tribes from Governor's office to invite each Tribe to actively participate in the project process. Consultant to meet with the designated point person and City staff to agree upon approach to the dialog.
- 2.11 City, Partners, and Consultant will conduct up to 20 community conversations with:
- Local and regional business organizations
 - Local and regional neighborhood, advisory, and civic organizations
 - Former Blue Heron employees
 - Local and regional environmental organizations
 - Local and regional historic advocacy organizations
 - Senior community members
 - Universal advocacy community members
 - Local and regional Non-English as a first language community members
 - Youth community members through area schools
 - Tourism Groups
 - Cultural Affairs groups
- For formal Blue Heron employees, coordinate with City staff on oral history methodology, timing, and approach.

- Consultant to oversee master list for tracking community conversations, City to administer list and assist partners with scheduling meetings and notifying consultant of scheduled time/place for tracking. Consultant to lead up to five (5) community conversations. City and partners may complete more than 20 conversations if staff time is available. City to compile and summarize all results. Consultant to review and comment on final summary report.
- 2.12 Prepare materials including holding a planning meeting, assigning roles and responsibilities, media releases, key messages, and website and social media updates for Partners Group Summit #1. Coordinate logistics with assistance from City.
 - 2.13 Facilitate Partners Group Summit #1:
Define issues, opportunities, concerns and aspirations as part of the vision development, share community feedback on development of Willamette Falls vision
 - 2.14 Prepare materials including holding a planning meeting, assigning roles and responsibilities, draft and final agenda, media releases, key messages, and website and social media updates for Community Interactive Event #1. Coordinate logistics with assist from City.
 - 2.15 Facilitate Community Interactive Event #1:
Stakeholders and the public will be invited to review results of Partners Group Summit #1, review the summary of existing conditions, review initial thinking on the potential real estate market opportunities and limitations, reflect upon preliminary visioning work done with initial community conversations, and provide feedback.
 - 2.16 Provide content to City for City/Planning Commission updates
 - 2.17 Provide content updates pre and post Community Interactive Event through media outlets. Follow-up with key media; reporters, newsletters.
 - 2.18 Team will present findings of existing technical conditions and site analyses to the City Commission
 - 2.19 Team will present findings of existing technical conditions and site analyses to the Planning Commission

PHASE 2 Meetings

- Weekly coordination meetings and calls with PMT
- Site visits
- Community Conversations (up to 20 total, Consultant to lead up to 5)
- ODOT, DLCD, City transportation work session
- Planning meeting for Partners Group Summit and Community Event
- Partners Group Summit #1
- Community Interactive Event #1
- City Commission presentation
- Planning Commission presentation

PHASE 2 Products

- Site and context diagrams, including regional trails map (8-12 maps)
- Diagrams of existing structures and their inter-relationships (2-4 diagrams)

- Illustrated, infographic brochure, up to 8 pages, summarizing technical information according to four core values
- Preliminary Market Review memo
- Digital (ACAD) site survey of 1996 Oregon City Flood Boundary, showing a revised flood line supported by air photographic evidence. A river profile graphic will also be developed showing the gradient of the flood elevation across the site, resulting line will inform City's adjustment of 1996 Flood Boundary through a local map amendment, based on best available information, to be included in the overall General Development Plan Application.
- Community Event exhibits and Powerpoint presentations
- Exhibits for presentations to Planning Commission and City Commission
- Summary of meetings with Tribal Leadership
- Community Conversations meeting summary (summary of key themes and recommendations for next steps)
- Partners Group Summit #1 Draft and Final summary (to include overview of engagement activities to date, summary of Partners Group Summit #1, key decisions, next steps, and key themes received in feedback)
- Community Interactive Event Draft and Final Summary (to include overview of engagement activities to date, summary of community interactive event, and key themes received in feedback)
- Standard list for media publications and e-blasts
- Content updates for web, social media, press release, and newsletter updates
- Meeting Notes, including summaries of Partners and public comments
- Updated work plan and schedule for Phase 3

PHASE 2 PUBLIC ENGAGEMENT: City of Oregon City Responsibility

- Coordinate scheduling of meetings with different Tribes and coordinate schedules for Tribal meetings
- Maintain community conversation list, compile and consolidate conversation comments and make formal invitations to each group
- Conduct community conversations and site tours, assist partners with community conversations scheduling and reporting back.
- Assist consultant with logistics in preparation for Partners Group Summit #1 and Community Interactive Event #1, to include scheduling and reserving event space, printing and production of printed materials and boards, collecting and providing meeting support materials (easels, markers, flip charts, etc.).
- Participate in Partners Group Summit #1 and Community Interactive Event #1
- Update and maintain website and social media with content updates from consultant
- Identify Historic Oregon City photos to use for website, Facebook, Instagram, and Twitter content postings, as well as other media releases
- Assist in gathering sources for standard e-blast and media list
- Lead oral history methodology research and approach for Blue Heron employee history project
- Manage and maintain kits for conversations, site tour, and events

PHASE 2 PUBLIC ENGAGEMENT: Consultant Responsibility

- Consultant to meet with government to government designee to review materials.
- Consultant will provide oversight for formal invitation letter to Tribes from Governor's office to invite each Tribe to actively participate in the project process.
- Consultant to meet with government to government designee and City to coach on project presentation and dialog.
- Provide at minimum:
 - One blog post per event (total 2 blog posts this phase)
 - One pre-created newsletter article for media release per project phase
 - Once weekly Facebook, Instagram, and Twitter content
 - Once per-phase media releases (earned, and if designated, purchased)
 - Create standard e-blast and publication list for publications and media
 - Lead preparation for planning meeting and preparation of Partners Group Summit #1 and Community Interactive Event #1 with support from City and project team
 - Facilitate Partners Group Summit #1 and Community Interactive Event #1 with support from City and project team with interactive content for youth and adults at community event
 - Written summaries for community conversations, community interactive event and Partners Group Summit #1.
 - Support and coordinate with City the Blue Heron employee oral history methodology, timing and approach

PHASE 2 Schedule

July to late August 2013

PHASE 3: PREPARE INITIAL REDEVELOPMENT SCENARIOS

- 3.1 Team will update technical understanding and site analyses as needed based on input received and information generated.
- 3.2 Develop initial framework scenarios based on information gathered, national examples, and input received. These scenarios will represent broad, thematic options for the site that explore the site's capacity and highlight general opportunities and constraints. They will lead to more detailed alternative drawings in the next phase.
- 3.3 In design session with the PMT, core team will present and thoroughly discuss initial framework scenarios, with emphasis on:
 - Development opportunities and viability, including Program
 - Define and describe community activities in the area around the falls covering opportunities to enter/access the site, at the edge of the site in relation to the river and falls as well as on the water adjacent the falls. Define the activities and market segments from a local and visitor perspective
 - Opportunities for historic and archeological preservation, rehabilitation and integration into development potential while retaining historic integrity.
 - Opportunities for river access by the public including initial catalyst project that provide early access to view the falls

- Conservation and restoration of natural resources including habitat, wildlife and fish around the falls
 - Infrastructural implications including floodplain development restrictions, risk, and uncertainty
 - Opportunities for development that will bring quality jobs
 - Barriers to development (physical, financial, regulatory)
 - Initial land use application impacts and information needed for submittal
 - Key questions for technical team members will be identified for follow-up resolution
- 3.4 In design sessions with team, evaluate economic viability of scenarios, including consistency with long-term market opportunities. Provide a rough estimate of the number of new jobs that could be accommodated in new buildings in each scenario, based on square-footage estimates.
- 3.5 Refine this information and present in one-on-one meetings with key members of the TAC. These TAC members will evaluate the broad financial feasibility of these scenarios, the initial analysis of floodplain implications, as well as the viability of public space proposals. Initial scenarios will be further refined with this TAC input.
- 3.6 Consultant to assist with continued government to government relationships with the Confederated Tribes of Grand Ronde, the Confederated Tribes of Warm Springs, the Confederated Tribes of the Umatilla Indian Reservation, the Confederated Tribes of Siletz Indians, and the Confederated Tribes and Bands of the Yakama Nation led by the Governor's Office appointee. Consultant to assist with materials development and refinement of the multiple Tribes' vision in process.
- 3.7 Work with PMT to create questions for Metro Opt-In survey.
- 3.8 City, Partners, and Consultant will conduct up to 20 community conversations with:
- Local and regional business organizations
 - Local and regional neighborhood, advisory, and civic organizations
 - Former Blue Heron employees
 - Local and regional environmental organizations
 - Local and regional historic advocacy organizations
 - Senior community members
 - Universal advocacy community members
 - Local and regional Non-English as a first language community members
 - Youth community members through area schools

Consultant to oversee master list for tracking community conversations, City to administer list and assist partners with scheduling meetings and notifying consultant of scheduled time/place for tracking. Consultant to lead up to five (5) community conversations.

Consultant to update kits as needed for conversations/site tour/table events.

City to compile and summarize all results. Consultant to review and finalize summary

- 3.9 Consultant to provide content updates via newsletter, blog, and social media postings pre and post Community Interactive Event through media outlets.
- 3.10 Team will present initial scenarios to the City Commission
- 3.11 Team will present initial scenarios to the Planning Commission

PHASE 3 Meetings

- Weekly coordination meetings and calls with PMT
- TAC member consultation, one on one.
- Community Conversations (up to 20)
- City Commission presentation
- Planning Commission presentation

PHASE 3 Products

- Updated site analyses
- Initial framework scenarios/diagrams
- Sketches/info developed at design work sessions
- Exhibits for presentations to Planning Commission and City Commission
- Meeting Notes (Community Conversation notes will be maintained by the City of Oregon City)
- Updated work plan and schedule for Phase 4
- Summary of meetings with the Tribes
- Community Conversation final meeting summary (summary of key themes and recommendations for next steps)
- Community Interactive Event Draft and Final Summary (to include overview of engagement activities to date, summary of community interactive event, and key themes received in feedback)
- Regional Community Draft and Final Event Summary
- Opt-in Survey draft questions; final review draft (Survey summary will be created by Metro consultant)
- Content updates for web, social media, press release, and newsletter updates

PHASE 3 PUBLIC ENGAGEMENT: City of Oregon City Responsibility

- Maintain community conversation list, compile and consolidate conversation comments
- Conduct community conversations and site tours, assist partners with community conversations scheduling and reporting back.
- Participate in survey development for Metro Opt-In, 2 rounds of revision, lead consolidation of comments from partners for consultant.
- Update and maintain website and social media with content updates from consultant
- Identify Historic Oregon City photos to use for website, Facebook, Instagram, and Twitter content postings, as well as other media releases

- Lead oral history methodology research and approach for Blue Heron employee history project
- Manage and maintain kits for conversations, site tour, and events

PHASE 3 PUBLIC ENGAGEMENT: consultant Responsibility

Provide at minimum:

- One blog post per event (total posts this phase, 3)
- One pre-created newsletter article for media release per project phase
- Once weekly Facebook, Instagram, and Twitter content
- Once per-phase media releases and follow up with key media/reporters/newsletters
- Purchase media as agreed upon in Phase 1
- Support and coordinate with City the Blue Heron employee oral history methodology, timing and approach
- Lead development for Opt-In Survey, 2 rounds of revisions
- Update kit content for conversations, site tour, events

PHASE 3 Schedule

September 2013

PHASE 4: PREPARE DETAILED PLAN ALTERNATIVES

- 4.1 Refine Scenarios into plan alternatives
- 4.2 In two design sessions with the PMT, thoroughly discuss detailed plan alternatives based on the favored elements of the initial scenarios. This may take the form of a strong base concept with alternatives for specific areas on site. Refinements will consider utility and infrastructure implications as well as habitat opportunities. Refinements will also begin to understand building massing and refine program. Team will review alternatives with George Kramer in a GoTo Meeting conference call.
- 4.3 DKS will consider how plan alternatives will affect transportation system, evaluating:
 - Operations / safety and pedestrian/bicycle connections to the site, including possible highway crossing enhancements
 - Compare off-site impacts for nearby locations outside of MMA
 - Appropriate locations for transit / rail stops
 - Define design standards/concepts that support multimodal transportation choices in the study area.
 - Transportation work will include coordination with City staff, DLCD and ODOT in a work session
- 4.4 Review the alternatives in consideration of initial land use impacts and initiate first steps in preparation of land use submittal.
- 4.5 Illustrated brochure, (featuring each Core Value, up to 8 pages, prepared by Walker Macy), will be updated to present Plan Alternatives
- 4.6 Interviews with state and local agencies to refine regulatory understanding

- 4.7 Pre-Application Conference with City of Oregon City
- 4.8 Turner Construction will prepare general costs/square foot for specific development types envisioned in draft alternatives. Turner will generate ranges of costs for vertical development, rather than a single specific estimate and will also coordinate specific infrastructure costs with KPFF. Turner Construction's work is pro-bono.
- 4.9 Test alternatives against long-term market opportunities/strategies and job-generation potential. Generate land proforma, including site preparation and infrastructure costs, that demonstrate how residual land values can provide a reasonable return on investment. Provide any necessary updates to jobs / sq ft estimates.
- 4.10 Team will present and discuss plans with two TAC sessions (scheduled on same day), one focusing on Development issues, the other with River and habitat issues. Each alternative will include building envelope options for development areas, as well as a draft program and planning-level cost estimates, to be evaluated by the Development-oriented TAC. The River-oriented TAC will evaluate the public space proposals and regulatory implications and specifically focus on the findings of the aerial-photo-based interpretation of the 1996 Flood.
- 4.11 Team will conduct Interactive Community Event #2 (and update website and related materials) to review draft concepts for the site master plan
- 4.12 Team will also conduct a Regional Open House/Interactive Community Event and presentation, potentially at Metro HQ, recognizing the regional importance of this project and level of interest from Metro-area citizens and local design and planning professionals. This open house to review concepts could also be tied to a lecture by a visiting expert with work experience on a precedent project.
- 4.13 Team will present detailed alternatives to the City Commission
- 4.14 Team will present detailed alternatives to the Planning Commission

PHASE 4 Meetings

Weekly coordination meetings and calls with PMT
GoTo Conference Call with George Kramer
ODOT, DLCD, City transportation work session
Community Interactive Event #2
Regional Community Event
TAC (#1)
Pre-Application Conference with City of Oregon City
City Commission presentation
Planning Commission presentation

Phase 4 Products

- Draft MMA Ordinance
- Refined Plan Alternatives
- Comparative Proforma for each Alternative
- Prototypical costs for development types

- Illustrated Brochure
- Community Event exhibits and powerpoint presentations
- Exhibits for presentations to Planning Commission and City Commission
- Summaries of stakeholder and public comments
- Updated work plan and schedule for Phase 5
- Summary of meetings with the Tribes
- Community Conversation final meeting summary (summary of key themes and recommendations for next steps)
- Community Interactive Event Draft and Final Summary (to include overview of engagement activities to date, summary of community interactive event, and key themes received in feedback)
- Regional Community Event Draft and Final Event Summary
- Opt-in Survey draft questions; final review draft (Survey summary will be created by Metro consultant)
- Content updates for web, social media, press release, and newsletter updates

PHASE 4 PUBLIC ENGAGEMENT: City of Oregon City Responsibility

- Maintain community conversation list, compile and consolidate conversation comments
- Conduct community conversations and site tours, assist partners with community conversations scheduling and reporting back.
- Assist consultant with logistics in preparation for Community Interactive Event #2 and Regional Event, to include scheduling and reserving event space, printing and production of printed materials and boards, collecting and providing meeting support materials (easels, markers, flip charts, etc.).
- Participate in Community Interactive Event #2, and Regional Interactive Event
- Participate in survey development for Metro Opt-In, 2 rounds of revision, lead consolidation of comments from partners for consultant.
- Update and maintain website and social media with content updates from consultant
- Identify Historic Oregon City photos to use for website, Facebook, Instagram, and Twitter content postings, as well as other media releases
- Lead oral history methodology research and approach for Blue Heron employee history project

PHASE 4 PUBLIC ENGAGEMENT: consultant Responsibility

Provide at minimum:

- One blog post per event (total posts this phase, 3)
- One pre-created newsletter article for media release per project phase
- Once weekly Facebook, Instagram, and Twitter content
- Once per-phase media releases and follow up with key media/reporters/newsletters
- Purchase media as agreed upon in Phase 1
- Lead preparation for planning meeting and preparation of Community Interactive Event #2 with support from City and project team

- Facilitate Community Interactive Event #2 with support from City and project team with interactive content for youth and adults at community event
- Support and coordinate with City the Blue Heron employee oral history methodology, timing and approach
- Lead development for Opt-In Survey, 2 rounds of revisions
- Update kits for conversations, site tour, events

PHASE 4 Schedule

October-early November 2013

PHASE 5: PREPARE A PREFERRED MASTER PLAN CONCEPT

- 5.1 Prepare a Preferred Master Plan Concept based on the favored elements of the Alternatives and review with PMT. Preferred Plan will include a strategy for circulation and public access to and from the property and identify opportunities to connect the site to surrounding amenities on both land and water. Plan will also include a conceptual Phasing strategy that will include options for quick implementation of key steps in redevelopment and public access soon after approval is granted for the rezone. Plan concept will also describe how the preferred concept contributes to economic development strategy implementation, and provide updated jobs estimates as well as rough, order-of-magnitude estimates of induced jobs and spending.
- 5.2 Review Preferred Plan for infrastructure/utility implications with team and with City Engineer
- 5.3 Team will prepare a planning-level order of magnitude cost estimate for the Preferred Plan.
- 5.4 DKS will consider how Preferred Concept can support MMA designation, evaluating:
 - Operations / safety and pedestrian/bicycle connections to the site, including possible highway crossing enhancements
 - New railroad crossings and clearance requirements, if required
 - Identify needed off-site improvements for walking, bike and access to transit
 - Identify suitable performance measures for monitoring and implementation (e.g., safety, accessibility, etc.) to replace the mobility standards within the MMA
 - Identify management concepts to reduce off-site impacts
 - Appropriate locations for transit stops
 - Multimodal supportive design standards
 - Identify any improvements that require an amendment to the TSP
 - Identify phasing options for recommended package of off-site and on-site transportation improvements
 - Transportation work will include coordination with City staff, DLCD and ODOT in a work session
- 5.5 Begin preparation of GDP Land Use submittal, to 60% completion
- 5.6 Team will present plan to a Joint meeting of TAC members to assess the Preferred Plan's public space options, building envelope options and FAR for development areas, as well

- as presenting planning-level cost estimates. Team will refine Plan accordingly after this Joint TAC.
- 5.7 Illustrated brochure, (featuring each Core Value, up to 8 pages, prepared by Walker Macy), will be updated to present Preferred Plan
 - 5.8 Prepare materials including roles and responsibilities, media releases, key messages, and website and social media updates for Partners Summit #2. Coordinate logistics with assist from City.
 - 5.9 Team will conduct Partners Group Summit #2 to review final plan concept.
 - 5.10 Prepare materials including roles and responsibilities, media releases, key messages, and website and social media updates for Community Interactive Event #2. Coordinate logistics with assist from City.
 - 5.11 Facilitate Community Interactive Event #3: Review final concepts
 - 5.12 Consultant to provide content updates pre and post Community Interactive Event #3 through media outlets.
 - 5.13 Written summaries for community conversations, Community Interactive Event #3 and Partners Group Summit #2.
 - 5.14 Team will present Preferred Alternative to the City Commission
 - 5.15 Team will present Preferred Alternative to the Planning Commission
 - 5.16 Participate in guided Tours to describe Preferred Plan to the public (optional—once site salvage activities have been completed)

PHASE 5 Meetings

Weekly coordination meetings and calls with PMT
ODOT, DLCD, City transportation work session
Partners Group Summit #2
Joint Technical Advisory Committee (TAC #2)
Community Interactive Event #3
City Commission presentation
Planning Commission presentation

PHASE 5 Products

- Preferred Plan and supporting graphics, including cross-sections, 3-D perspectives, elevation sketches, before and after visualizations
- Draft of Land Use submittal and list of required drawings (60% complete)
- Illustrated Brochure
- Order of Magnitude cost estimate
- Request for Letter of Approval from DLCD for MMA (Approval sought before submittal of Land Use Application in January 2014)
- Community Event exhibits and powerpoint presentations
- Partners Group Summit #2 Draft and Final summary (to include overview of engagement activities to date, summary of Partners Group Summit #2, key decisions, next steps, and key themes received in feedback)

- Community Interactive Event #3 Draft and Final Summary (to include overview of engagement activities to date, summary of community interactive event, and key themes received in feedback)
- Content updates for web, social media, press release, and newsletter updates
- Exhibits for presentations to Planning Commission and City Commission
- Updated work plan and schedule for Phases 6-7

PHASE 5 PUBLIC ENGAGEMENT: City Of Oregon City Responsibility

- Conduct any remaining community conversations and site tours, assist partners with community conversations scheduling and reporting back.
- Assist consultant with logistics in preparation for Partners Group Summit #2, and Community Interactive Event to include scheduling and reserving event space, printing and production of printed materials and boards, collecting and providing meeting support materials (easels, markers, flip charts, etc.).
- Participate in Partners Group Summit #2 and Community Interactive Event #3
- Update and maintain website and social media with content updates from consultant
- Continue to identify Historic Oregon City photos to use for website, Facebook, Instagram, and Twitter content postings, as well as other media releases

PHASE 5 PUBLIC ENGAGEMENT: Consultant Responsibility

- Provide at minimum:
 - One blog post per event (total this phase, 2)
 - One pre-created newsletter article for media release per project phase
 - Once weekly Facebook, Instagram, and Twitter content
 - Once per-phase media releases (earned, and if designated, purchased)
- Lead preparation for planning meeting and preparation of Partners Group Summit #2 and Community Interactive Event #3 with support from City and project team
- Facilitate Partners Group Summit #2 and Community Interactive Event #3 with support from City and project team with interactive content for youth and adults at community event

PHASE 5 Schedule

November–mid-December 2013

PHASE 6: DEVELOP A GENERAL DEVELOPMENT PLAN AND ZONE CHANGE APPLICATION

- 6.1 Team will write and prepare graphics for the Quasi-Judicial Land Use application for the master plan on behalf of the applicant, according to (OCMC 17.65). It will include all of the relevant existing conditions mapping and narrative as listed in OCMC 17.65.050. The application shall be submitted in time to be heard at the April 24, 2014 Planning Commission Hearing. (Submission date is assumed to be 90 days prior to the hearing date.) This application will request rezoning for the site and amend the Comprehensive Plan designation, changing the property from GI-Industrial to MUD-Mixed Use Downtown (or equivalent).

The Application narrative and graphics will also address and provide:

- Revision of the Oregon City 1996 flood boundary (based on survey and photographic analysis of the 1996 Flood)
- Identification of off-site impacts and mitigation projects necessary to address the identified impacts.
- Infrastructure improvement cost estimates and conceptual utility layouts and conceptual stormwater treatment options.
- Site circulation plan, including:
 - Compliance to the Regional Transportation Plan (RTP) Transportation Planning Rule (TPR) and adoption of a Multimodal Mixed-use Area (MMA)
 - Implementation/monitoring requirements for MMA
 - Mitigation measures
 - Improvements that require an amendment to the TSP
- Phasing options for recommended package of off-site and on-site transportation improvements
- General roadway cross-sections (detailed cross-sections and road layouts will be part of subsequent developer-prepared packages)
- Identification of lands available for open space (including habitat restoration), public access and development, allowing for potential partition of public open space parcel.
- Impacts of the proposed development on inventoried Goal 5 natural, historic or cultural resources within the development boundary or within two hundred fifty feet of the proposed development boundary.
- Identification / incorporation of innovative design approaches and strategies appropriate for the site, including proposed general development standards, height limits, lot coverage and setbacks

- 6.2 A Draft Application will be reviewed by the PMT and Oregon City staff, including Fire, Public Works and City Attorney, to ensure materials meet submittal requirements and that text is legally defensible and appropriate. Application will be revised and submitted for detailed review by Trustee, whose agreement and signature must be obtained for submittal.
- 6.3 Review of land use application and exhibits by George Kramer in a GoTo Meeting conference call.
- 6.4 Materials will be revised as needed for final submittal.
- 6.5 Application will be submitted by Team on behalf of the City, with Trustee signature.
- 6.6 Consultant to provide content updates throughout the application process to website, social media, and media (earned/purchased) outlets
- 6.7 Team will update Planning Commission on Land Use Application progress (mid-January)

PHASE 6 Meetings

Weekly coordination meetings or calls with PMT and team, to review drafts of submittal and coordinate City, Trustee and TAC review of drafts.

PHASE 6 Products

Content updates for web, social media, press release, and newsletter updates
Draft Land Use Submittal
Final Land Use Submittal

PHASE 6 PUBLIC ENGAGEMENT: City Of Oregon City Responsibility

- Update and maintain website and social media with content updates from consultant
- Continue to identify Historic Oregon City photos to use for website, Facebook, Instagram, and Twitter content postings, as well as other media releases
- Continue to lead oral history methodology research and approach for Blue Heron employee history project

PHASE 6 PUBLIC ENGAGEMENT: Consultant Responsibility

- Provide at minimum:
 - One blog post during land use application phase
 - One pre-created newsletter article for media release per project phase
 - Once monthly Facebook/Twitter/Instagram content (City can provide additional with Instagram during this time)
 - One earned media release with land-use application
 - One final/close-out media release for earned media, purchased (if designated), blog/website, Facebook, Twitter, and Instagram

PHASE 6 Schedule

Oregon City departments require 3 months of review prior to PC review, therefore this Application will be submitted no later than January 24, 2014.

PHASE 7: PLANNING AND CITY COMMISSION HEARINGS

- 7.1 Prepare presentation graphic materials.
- 7.2 Team will discuss presentation strategy with PMT.
- 7.3 Team will attend and assist with presentations for an estimated 3 Planning Commission and 2 City Commission Hearings. on zone change and comprehensive plan amendment.

PHASE 7 Meetings

Bi-weekly Coordination meetings or calls with PMT
Representatives of the consultant team will attend all public hearings related to this project, beginning with the April 24th Planning Commission Hearing. A total of 5 City and/or Planning Commission Hearings are assumed.

PHASE 7 Products

Presentation graphics for use in Planning and City Commission Hearings

PHASE 7 Schedule

Due to City Review Requirements, the Land Use Application will be submitted 90 days prior to April 24th.

PHASE 8: PREPARE VISION STRATEGY REPORT

- 8.1 The process and plan will be summarized in a well-illustrated concise document, with infographic elements, that includes sections that address:
- Project Vision
 - Community Engagement
 - Site Analysis
 - Background Information (and gaps)
 - Alternatives studied
 - Preferred Alternative, including vision plan, circulation plan, parks and open spaces, and economic development implications
 - Sustainability Strategy, including opportunities for energy efficiency, green buildings, low-impact stormwater treatment and integrated open spaces
 - Implementation Strategy and Action plan that will guide and educate elected officials and the general public on the fiscal and political approach needed to implement the vision. This will build on all the work to date and highlight the important next steps in the process, identify funding gaps, phasing, sources of uses and order of magnitude costs.
 - Key next steps will include (not in this scope of work):
 - Site property partitions for open spaces
 - Additional habitat restoration studies and projects
 - Additional work required to adjust 1996 Flood Boundary and associated regulations
 - Identifying and funding catalyst projects that can be implemented within 5 years of this study
 - High-level political and regulatory next steps
 - Phase 1 Detailed Development Plan
- 8.2 Team will review drafts with the PMT.
- 8.3 Update website, public involvement materials with current content through adoption of Master Framework Plan.
- 8.4 Prepare materials including roles and responsibilities, media releases, key messages, and website and social media updates for Partners Group Summit #3. Coordinate logistics with assist from City.
- 8.5 Facilitate Partners Group: Summit #3: Review final concepts
- 8.6 Written summaries for community conversations, community interactive event and Partners Group Summit #3.
- 8.7 Draft Report will be revised and finalized, for Oregon City Commission Adoption by Resolution, as well as Metro, Clackamas County and State of Oregon Acknowledgment.

PHASE 8 Meetings

Review drafts in 2 meetings with the PMT
Partners Group Summit #3

PHASE 8 Products

Draft Vision Strategy Report
Final Vision Strategy Report
Partners Group Summit Draft and Final summary (to include overview of engagement activities to date, summary of Partners Group Summit #3, key decisions and key themes received in feedback)

PHASE 8 PUBLIC ENGAGEMENT: CITY OF OREGON CITY Responsibility

- Assist consultant with logistics in preparation for Partners Group Summit #3.
- Participate in Partners Group Summit #3

PHASE 8 PUBLIC ENGAGEMENT: Consultant Responsibility

- Lead preparation for planning meeting and preparation of Partners Group Summit #3 with support from City and project team
- Facilitate Partners Group Summit #3

PHASE 8 Schedule

3 months after Final City Commission hearing and plan approval (to ensure that plan reflects latest information).

Fees

The above scope of work will be accomplished within the available project budget of **\$500,000** (which includes expenses).

We propose to bill monthly on a percentage complete basis. Expenses include travel, printing costs, telephone charges and postage. Please contact me if you have any questions related to this proposal or if you would like additional information.

Regards,
Walker Macy



Michael W Zilis
Principal
Walker Macy