

## Request for Proposals

Update to the City of Boardman System Development Charges  
Methodology and Fee Schedule  
and an  
Update to the City of Boardman System Development Charges  
Implementing Ordinance

City of Boardman  
200 City Center Circle  
Post Office Box 229  
Boardman, Oregon 97818

June 11, 2021



## PROJECT OVERVIEW

The City of Boardman has in place a System Development Charge ordinance adopted in 1999 that covers water, wastewater, drainage, streets, flood controls, and parks. Practically the portions that have been analyzed and implemented are water and wastewater. The City is seeking an update to the formula, its methodology, and ordinance provisions consistent with both City of Boardman policy, the various adopted plans that govern public infrastructure, and requirements in Oregon Revised Statute. Components to be updated to the SDC methodology are water and wastewater with transportation and parks to be added. Other components may be considered based on time and budget.

The project is anticipated to start approximately October 1, 2021 and conclude no later than June 30, 2022.

## PROPOSALS SUBMITTAL

Five copies of the proposal, clearly marked "City of Boardman System Development Charge Update," along with an electronic copy on a thumb (USB) drive, must be received by 4:00 p.m. on Friday, July 30, 2021 at the following address:

Karen Pettigrew  
City Manager  
200 City Center Circle  
Post Office Box 229  
Boardman, Oregon  
541-481-9252  
[kpettigrew@cityofboardman.com](mailto:kpettigrew@cityofboardman.com)

Should Proposers identify missing components or have questions during the Proposal development process please address those questions via email to the Project Lead. Questions and their answers will be posted to the City of Boardman website on the SDC project page.

## COLLABORATION WITH STAFF/COMMUNITY PROCESS

Project staff will collaborate with the consultant to provide available existing data, including current and historical SDC rates and utilization. Also available will be various reports and plans concerning City of Boardman infrastructure. The current ordinance governing the SDC program is available on the City of Boardman website.

The Boardman City Manager, Community Development Director, Public Works Director, and the Cities land use planning consultant shall serve as the Project Management Team (PMT) and the Technical Advisory Committee (TAC). Consultant shall work in partnership with the PMT/TAC, which has the responsibility of guiding the project and review of products through the various project stages.

A Public Advisory Committee (PAC) will also be utilized drawing from local property owners, port business representatives, City Council representation, and others. The Consultant shall hold an initial meeting with the PMT/TAC and PAC to kick off and present an overview of the project, including timelines.

The consultant shall be expected to participate in meetings with the City and the community. Consultant will be responsible for presenting the final product and assisting City staff with development and

deployment of necessary and required public notices, press releases, and other communications throughout the project.

#### COMMUNITY BACKGROUND

The City of Boardman continues to grow with primary Port of Morrow operations within and adjacent to the City limits creating continuing growth for residential, commercial, and industrial opportunities. Port of Morrow employment is at 8,500 jobs with an economic output nearing \$3 billion annually. Commercial development is growing with Ace Hardware, Dollar General, Family Dollar, and Murrey Drug all making investment in Boardman. Industrial development of data centers and food processing plants are generating jobs leading to increased residential development opportunities. Over the past two years 100 new water connections have been added. New parks including a splash pad have been added as well.

This growth has placed pressure on the City of Boardman infrastructure resulting in this need to update the SDC methodology and formula which may result in changes to the current Ordinance.

#### SCOPE OF WORK

The following outlines the anticipated Scope of Work. All Proposals will address the Tasks and other factors deemed necessary to review the Proposals to select the best Consultant to accomplish the work the City of Boardman has determined is needed.

Complete the System Development Charge Update as follows (October 1, 2021- June 30, 2022):

##### Task 1: Project Management and Meetings

Consultant shall complete all tasks and provide all deliverables included. The proposal will outline how the Consultant will provide project management in the following areas:

- Communicate with the City Manager or Project Lead and the PMT/TAC on a regular basis.
- Provide regular written updates for the duration of the project.

Proposal will explain how the Consultant will determine needed City plans and data. It is anticipated that the data would include at a minimum recent capital plans, master plans (e.g., water, wastewater, parks) and system plans, an inventory of existing City parks, current debt service schedules and fixed asset listings, customer data and growth forecasts, and the existing SDC ordinance.

The City anticipates the Consultant convening the necessary meetings during the project including a Kickoff Meeting, project update meetings, and a meeting to present the final draft work product to the PMT/TAC and PAC. Support for the Public Hearing before the City Council is also expected.

##### Deliverables:

- Regular updates to the City Manager or Project Lead
- Regular written reports
- Kickoff Meeting
- Project Update Meetings (including presentation of the final draft)
- City Council Public Hearing

##### Task 2: Policy and Ordinance Review

The proposal will outline how the Consultant will work with the PMT/TAC to provide key policy direction to the City concerning the SDC structures, bases, and/or calculations. Through written technical

memorandums or other mechanisms, the Consultant will provide policy choices and recommend a course of action on each policy question. Considerations may include various approaches to level of service, the applicability of a reimbursement fee or an improvement fee, and how to determine the basis of the charge for each service.

Another component of this task will also include an analysis of the current System Development Charge Ordinance and outline required or recommended amendments. The Proposal will outline how this activity will be accomplished.

**Deliverables:**

- Technical Memorandum outlining policy considerations and recommendations for the City of Boardman.
- Redline of the SDC Ordinance with required or recommended amendments.

**Task 3: Technical Analysis**

The Proposal will outline the approach the Consultant will employ to work with the PMT/TAC and the PAC to accomplish the technical analysis. A complete proposal will include rational for accomplishing both a reimbursement fee (as applicable) and an improvement fee.

**Deliverables:**

- Technical Memorandum addressing both the Reimbursement Fee and the Improvement Fee including the rational for both.

**Task 4: Study Documentation and Presentation**

The Proposal will outline how the process will be summarized in a final report and other project documents, formulas, or other products. Additionally, the proposal will address how the Consultant will support necessary and beneficial professional communication of the study's findings and results. This component of the Proposal should outline interim reviews with PMT/TAC, report preparation, and define the number and type of presentations to the PMT/TAC and PAC. Also to be considered is the public hearing process and how the Consultant would support the PMT/TAC with presentations to the community and the City Council. The following elements should be addressed:

- Review Meetings.
- Prepare SDC Study Report.
- Public Notice and press release for public meetings and hearings.
- City Council Presentation.

**Deliverables:**

- Review meetings.
- SDC Draft and Final Study Report.
- Final Draft of SDC Ordinance.
- Public Notices and Press Releases.
- City Council meeting
- Adoption documents including adopting ordinance.

## PAYMENT SCHEDULE

Develop a requested payment schedule showing the number, timing, and amount of interim and final payments. Relate interim payments to products, if applicable. The payment schedule should include a reasonable number of payments.

## COSTS INCURRED

The City of Boardman is not liable for any costs incurred by the consultant in the preparation or presentation of the proposal or interview if one is needed.

## PROPOSAL FORMAT

The City requests that the Consultant respond to specific criteria that will facilitate proposal evaluation. The specific criteria are presented below. The criteria need not be presented on separate pages.

### A. Introductory Letter

The letter shall name the person(s) authorized to represent the Consultant in any negotiations and the name of the person(s) authorized to sign any contract, which may result. The letter shall indicate the insurance carried by the Consultant and be signed by an authorized representative of the Consultant.

### B. Consultant's Capabilities and Project Team

This criterion relates to the firm's capabilities and resources in relation to this project. Answers can be presented in a matrix or table as appropriate.

- Who would serve as Project Manager, key staff, and would sub-contractors be utilized?
- What is the experience of the team members?
- What are the anticipated hours of each team component?
- Are resources available to perform the work for the duration of the project?
- What similar projects by type and location have been performed within the last three years?
- Internal procedures and/or policies associated or related to work quality and cost control.

### C. Project Understanding

This criterion relates to whether the Consultant has a clear understanding of the project.

### D. Project Approach and Budget

This criterion is the heart of the response and deals with the Consultant's ability to clearly define the action to be taken to deal with the objectives and problems outlined in the scope of work. It should include the proposed design outline and schedule that indicate tasks, milestones, and staff assignments.

The Consultant shall include an estimated fee for services to be used by the City for budgetary purposes. The fee estimate will not be used as an evaluation criterion.

### E. Support Information

Support information should be limited to that which is pertinent to the proposal. Material must include at least three references from communities with similar population and needs, and may include graphs, charts, photos, resumes, certificates, etc.

## PROPOSAL REVIEW, EVALUATION, AND SELECTION

### Review

The PMT/TAC will evaluate submitted proposals, rank the proposals, and determine if interviews are needed. A final selection decision is anticipated to be made within two weeks of the submittal date unless interviews are determined to be necessary which could delay the selection decision by up to two weeks. The City has the right to require any clarification or change it needs to understand the Consultant's approach to the project and view of the work scope.

### Evaluation and Selection

Each proposal will be limited in length and judged as a demonstration of the Consultant's capabilities and understanding of the project. No amendments, additions or alternates shall be accepted after the submittal deadline. Incomplete submittals, incorrect information or late submittals will be disqualified. Evaluation criteria, maximum points and page limitations (one page is considered to measure 8 1/2" x 11") will be as follows:

Proposal Format and Evaluation Criteria Page Limitations and Maximum Point

Contents	Maximum Pages	Maximum Points
Introductory Letter	1	5
Consultant's Capabilities and Project Team	2	35
Project Understanding	1	20
Project Approach and Budget	3	35
Support Information	2	5
Total	9	100

## CONTRACT REQUIREMENTS

The successful Consultant shall enter a Personal Services Contract with the City of Boardman. Payment for contract services will be made not more than monthly, upon receipt of the Consultant's billing invoice, for work done to date, in accordance with the contract. The invoice shall include a summary of progress, or project summary, through the billing date. All billings will be processed through the project manager.

The City will not be liable for any pre-contractual expenses incurred and reserves the right to negotiate special requirements and service levels using the selected qualification(s) as a basis. Compensation for additional services will be negotiable.

The selected firm must agree to indemnify, hold harmless and defend the City from all liability or loss resulting from any suites, claims or actions brought against the City which result directly or indirectly from the wrongful or negligent actions of the consultant in the performance of the contract.

All documents, records, designs, and specifications developed by the selected firm about this project shall be the property of the City. Additionally, all responses to this RFP become the property of the City.

Any questions regarding this RFP should be directed to Carla McLane, project lead, at 541-314-3139 or by email at [mclane@eoni.com](mailto:mclane@eoni.com). As an alternative Karen Pettigrew, City Manager, can be reached at 541-481-9252 or by email at [kpettigrew@cityofboardman.com](mailto:kpettigrew@cityofboardman.com).