



**REQUEST FOR PROPOSALS #2017-119**

**FOR**

**CLACKAMAS COUNTY EMPLOYMENT LAND STRATEGY**

**BOARD OF COUNTY COMMISSIONERS**

**JIM BERNARD, Chair**  
**SONYA FISCHER, Commissioner**  
**KEN HUMBERSTON, Commissioner**  
**PAUL SAVAS, Commissioner**  
**MARTHA SCHRADER, Commissioner**

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**Donald Krupp**  
**County Administrator**

**George Marlton**  
**Procurement Division Director**

**Patricia Bride**  
**Analyst**

**PROPOSAL CLOSING DATE, TIME AND LOCATION**

**DATE: January 30, 2018**

**TIME: 2:00 PM, Pacific Time**

**PLACE: Clackamas County Procurement Division  
Clackamas County Public Services Building  
2051 Kaen Road, Oregon City, OR 97045**

## **SCHEDULE**

Request for Proposals Issued.....	January 9, 2018
Protest of Specifications Deadline.....	January 16, 2018, 5:00 PM, Pacific Time
Deadline to Submit Clarifying Questions.....	January 23, 2018, 5:00 PM, Pacific Time
Request for Proposals Closing Date and Time.....	January 30, 2018, 2:00 PM, Pacific Time
Deadline to Submit Protest of Award.....	Seven (7) days from the Intent to Award
Anticipated Contract Start Date.....	March 1, 2018

## TABLE OF CONTENTS

	Page
Section 1 – Notice of Request for Proposals .....	1
Section 2 – Instructions to Proposers.....	2
Section 3 – Scope of Work .....	6
Section 4 – Evaluation and Selection Criteria .....	12
Section 5 – Proposal Content (Including Proposal Certification).....	13

## **SECTION 1 NOTICE OF REQUEST FOR PROPOSALS**

Notice is hereby given that Clackamas County through its Board of County Commissioners will receive sealed Proposals per specifications until **2:00 PM, January 30, 2018** (“Closing”), to provide Clackamas County Employment Land Strategy. No Proposals will be received or considered after that time.

The resulting contract from this RFP will have an initial term of five (5) years through June 30, 2022.

Proposal packets are available from 7:00 AM to 6:00 PM Monday through Thursday at Clackamas County Procurement Division, Clackamas County Public Services Building, 2051 Kaen Road, Oregon City, OR 97045, telephone (503) 742-5444 or may be obtained at <http://www.clackamas.us/bids/>. Sealed Proposals are to be sent to Clackamas County Procurement Services – Attention George Marlton, Director at the above Kaen Road address.

Sealed Proposals may be emailed to [procurement@clackamas.us](mailto:procurement@clackamas.us) or sent to Clackamas County at the above Kaen Road address.

### Contact Information

Procurement Process and Technical Questions: Patricia Bride, [pbride@clackamas.us](mailto:pbride@clackamas.us), (503) 742-5447.

The Board of County Commissioners reserves the right to reject any and all Proposals not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any and all Proposals upon the finding that it is in the public interest to do so and to waive any and all informalities in the public interest. In the award of the contract, the Board of County Commissioners will consider the element of time, will accept the Proposal or Proposals which in their estimation will best serve the interests of Clackamas County and will reserve the right to award the contract to the contractor whose Proposal shall be best for the public good.

Clackamas County encourages bids from Minority, Women, and Emerging Small Businesses.

## SECTION 2 INSTRUCTIONS TO PROPOSERS

Clackamas County (“County”) reserves the right to reject any and all Proposals received as a result of this RFP. County Local Contract Review Board Rules (“LCRB”) govern the procurement process for the County.

**2.1 Modification or Withdrawal of Proposal:** Any Proposal may be modified or withdrawn at any time prior to the Closing deadline, provided that a written request is received by the County Procurement Division Director, prior to the Closing. The withdrawal of a Proposal will not prejudice the right of a Proposer to submit a new Proposal.

**2.2 Requests for Clarification and Requests for Change:** Proposers may submit questions regarding the specifications of the RFP. Questions must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, at the Procurement Division address as listed in Section 1 of this RFP. Requests for changes must include the reason for the change and any proposed changes to the requirements. The purpose of this requirement is to permit County to correct, prior to the opening of Proposals, RFP terms or technical requirements that may be unlawful, improvident or which unjustifiably restrict competition. County will consider all requested changes and, if appropriate, amend the RFP. County will provide reasonable notice of its decision to all Proposers that have provided an address to the Procurement Division for this procurement. No oral or written instructions or information concerning this RFP from County managers, employees or agents to prospective Proposers shall bind County unless included in an Addendum to the RFP.

**2.3 Protests of the RFP/Specifications:** Protests must be in accordance with LCRB C-047-0730. Protests of Specifications must be received in writing on or before 5:00 p.m. (Pacific Time), on the date indicated in the Schedule, or within three (3) business days of issuance of any addendum, at the Procurement Division address listed in Section 1 of this RFP. Protests may not be faxed. Protests of the RFP specifications must include the reason for the protest and any proposed changes to the requirements.

**2.4 Addenda:** If any part of this RFP is changed, an addendum will be provided to Proposers that have provided an address to the Procurement Division for this procurement. It shall be Proposers responsibility to regularly check the Bids and Contract Information page at <http://www.clackamas.us/bids/> for any published Addenda or response to clarifying questions.

**2.5 Submission of Proposals:** All Proposals must be submitted in a sealed envelope bearing on the outside, the name and address of the Proposer, the project title, and Closing date/time. Proposals must be submitted in accordance with Section 5.

All Proposals shall be legibly written in ink or typed and comply in all regards with the requirements of this RFP. Proposals that include orders or qualifications may be rejected as irregular. All Proposals must include a signature that affirms the Proposer’s intent to be bound by the Proposal (may be on cover letter, on the Proposal, or the Proposal Response form) shall be signed. If a Proposal is submitted by a firm or partnership, the name and address of the firm or partnership shall be shown, together with the names and addresses of the members. If the Proposal is submitted by a corporation, it shall be signed in the name of such corporation by an official who is authorized to bind the contractor. The Proposals will be considered by the County to be submitted in confidence and are not subject to public disclosure until the notice of intent to award has been issued.

No late Proposals will be accepted. Proposals submitted after the Closing will be considered late and will be returned unopened. Proposals may not be submitted by telephone or fax.

**2.6 Post-Selection Review and Protest of Award:** County will name the apparent successful Proposer in a “Notice of Intent to Award” letter. Identification of the apparent successful Proposer is procedural only and creates no right of the named Proposer to award of the contract. Competing Proposers will be notified in writing of the selection of the apparent successful Proposer(s) and shall be given seven (7) calendar days from the date on the “Notice of Intent to Award” letter to review the file at the Procurement Division office and file a written protest of award, pursuant to

LCRB C-047-0740. Any award protest must be in writing and must be delivered by hand-delivery or mail to the address for the Procurement Division as listed in Section 1 of this RFP.

Only actual Proposers may protest if they believe they have been adversely affected because the Proposer would be eligible to be awarded the contract in the event the protest is successful. The basis of the written protest must be in accordance with ORS 279B.410 and shall specify the grounds upon which the protest is based. In order to be an adversely affected Proposer with a right to submit a written protest, a Proposer must be next in line for award, i.e. the protester must claim that all higher rated Proposers are ineligible for award because they are non-responsive or non-responsible.

County will consider any protests received and:

- a. reject all protests and proceed with final evaluation of, and any allowed contract language negotiation with, the apparent successful Proposer and, pending the satisfactory outcome of this final evaluation and negotiation, enter into a contract with the named Proposer; OR
- b. sustain a meritorious protest(s) and reject the apparent successful Proposer as nonresponsive, if such Proposer is unable to demonstrate that its Proposal complied with all material requirements of the solicitation and Oregon public procurement law; thereafter, County may name a new apparent successful Proposer; OR
- c. reject all Proposals and cancel the procurement.

**2.7 Acceptance of Contractual Requirements:** Failure of the selected Proposer to execute a contract and deliver required insurance certificates within ten (10) calendar days after notification of an award may result in cancellation of the award. This time period may be extended at the option of County.

**2.8 Public Records:** Proposals are deemed confidential until the “Notice of Intent to Award” letter is issued. This RFP and one copy of each original Proposal received in response to it, together with copies of all documents pertaining to the award of a contract, will be kept and made a part of a file or record which will be open to public inspection. If a Proposal contains any information that is considered a **TRADE SECRET** under ORS 192.501(2), **SUCH INFORMATION MUST BE LISTED ON A SEPARATE SHEET CAPABLE OF SEPARATION FROM THE REMAINING PROPOSAL AND MUST BE CLEARLY MARKED WITH THE FOLLOWING LEGEND:**

**“This information constitutes a trade secret under ORS 192.501(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”**

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance” ORS 192.500(1). Therefore, non-disclosure of documents, or any portion of a document submitted as part of a Proposal, may depend upon official or judicial determinations made pursuant to the Public Records Law.

**2.9 Investigation of References:** County reserves the right to investigate all references in addition to those supplied references and investigate past performance of any Proposer with respect to its successful performance of similar services, its compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, its lawful payment of subcontractors and workers, and any other factor relevant to this RFP. County may postpone the award or the execution of the contract after the announcement of the apparent successful Proposer in order to complete its investigation.

**2.10 RFP Proposal Preparation Costs and Other Costs:** Proposer costs of developing the Proposal, cost of attendance at an interview (if requested by County), or any other costs are entirely the responsibility of the Proposer, and will not be reimbursed in any manner by County.

**2.11 Clarification and Clarity:** County reserves the right to seek clarification of each Proposal, or to make an award without further discussion of Proposals received. Therefore, it is important that each Proposal be submitted initially in the most complete, clear, and favorable manner possible.

**2.12 Right to Reject Proposals:** County reserves the right to reject any or all Proposals or to withdraw any item from the award, if such rejection or withdrawal would be in the public interest, as determined by County.

**2.13 Cancellation:** County reserves the right to cancel or postpone this RFP at any time or to award no contract.

**2.14 Proposal Terms:** All Proposals, including any price quotations, will be valid and firm through a period of one hundred and eighty (180) calendar days following the Closing date. County may require an extension of this firm offer period. Proposers will be required to agree to the longer time frame in order to be further considered in the procurement process.

**2.15 Oral Presentations:** At County's sole option, Proposers may be required to give an oral presentation of their Proposals to County, a process which would provide an opportunity for the Proposer to clarify or elaborate on the Proposal but will in no material way change Proposer's original Proposal. If the evaluating committee requests presentations, the Procurement Division will schedule the time and location for said presentation. Any costs of participating in such presentations will be borne solely by Proposer and will not be reimbursed by County. **Note:** Oral presentations are at the discretion of the evaluating committee and may not be conducted; therefore, **written Proposals should be complete.**

**2.16 Usage:** It is the intention of County to utilize the services of the successful Proposer(s) to provide services as outlined in the below Scope of Work.

**2.17 Review for Responsiveness:** Upon receipt of all Proposals, the Procurement Division or designee will determine the responsiveness of all Proposals before submitting them to the evaluation committee. If a Proposal is incomplete or non-responsive in significant part or in whole, it will be rejected and will not be submitted to the evaluation committee. County reserves the right to determine if an inadvertent error is solely clerical or is a minor informality which may be waived, and then to determine if an error is grounds for disqualifying a Proposal. The Proposer's contact person identified on the Proposal will be notified, identifying the reason(s) the Proposal is non-responsive. One copy of the Proposal will be archived and all others discarded.

**2.18 RFP Incorporated into Contract:** This RFP will become part of the Contract between County and the selected contractor(s). The contractor(s) will be bound to perform according to the terms of this RFP, their Proposal(s), and the terms of the Sample Contract.

**2.19 Communication Blackout Period:** Except as called for in this RFP, Proposers may not communicate with members of the Evaluation Committee or other County employees or representatives about the RFP during the procurement process until the apparent successful Proposer is selected, and all protests, if any, have been resolved. Communication in violation of this restriction may result in rejection of a Proposer.

**2.20 Prohibition on Commissions and Subcontractors:** County will contract directly with persons/entities capable of performing the requirements of this RFP. Contractors must be represented directly. Participation by brokers or commissioned agents will not be allowed during the Proposal process. Contractor shall not use subcontractors to perform the Work unless specifically pre-authorized in writing to do so by the County. Contractor represents that any employees assigned to perform the Work, and any authorized subcontractors performing the Work, are fully qualified to perform the tasks assigned to them, and shall perform the Work in a competent and professional manner. Contractor shall not be permitted to add on any fee or charge for subcontractor Work. Contractor shall provide, if requested, any documents relating to subcontractor's qualifications to perform required Work.

**2.21 Ownership of Proposals:** All Proposals in response to this RFP are the sole property of County, and subject to the provisions of ORS 192.410-192.505 (Public Records Act).

**2.22 Clerical Errors in Awards:** County reserves the right to correct inaccurate awards resulting from its clerical errors.

**2.23 Rejection of Qualified Proposals:** Proposals may be rejected in whole or in part if they attempt to limit or modify any of the terms, conditions, or specifications of the RFP or the Sample Contract.

**2.24 Collusion:** By responding, the Proposer states that the Proposal is not made in connection with any competing Proposer submitting a separate response to the RFP, and is in all aspects fair and without collusion or fraud. Proposer also certifies that no officer, agent, elected official, or employee of County has a pecuniary interest in this Proposal.

**2.25 Evaluation Committee:** Proposals will be evaluated by a committee consisting of representatives from County and potentially external representatives. County reserves the right to modify the Evaluation Committee make-up in its sole discretion.

**2.26 Commencement of Work:** The contractor shall commence no work until all insurance requirements have been met, the Protest of Awards deadline has been passed, any protest have been decided, a contract has been fully executed, and a Notice to Proceed has been issued by County.

**2.27 Best and Final Offer:** County may request best and final offers from those Proposers determined by County to be reasonably viable for contract award. However, County reserves the right to award a contract on the basis of initial Proposal received. Therefore, each Proposal should contain the Proposer's best terms from a price and technical standpoint. Following evaluation of the best and final offers, County may select for final contract negotiations/execution the offers that are most advantageous to County, considering cost and the evaluation criteria in this RFP.

**2.28 Nondiscrimination:** The successful Proposer agrees that, in performing the work called for by this RFP and in securing and supplying materials, contractor will not discriminate against any person on the basis of race, color, religious creed, political ideas, sex, age, marital status, sexual orientation, gender identity, veteran status, physical or mental handicap, national origin or ancestry, or any other class protected by applicable law.

**2.29 Intergovernmental Cooperative Procurement Statement:** Pursuant to ORS 279A and LCRB, other public agencies shall have the ability to purchase the awarded goods and services from the awarded contractor(s) under terms and conditions of the resultant contract. Any such purchases shall be between the contractor and the participating public agency and shall not impact the contractor's obligation to County. Any estimated purchase volumes listed herein do not include other public agencies and County makes no guarantee as to their participation. Any Proposer, by written notification included with their Proposal, may decline to extend the prices and terms of this solicitation to any and/or all other public agencies. County grants to any and all public serving governmental agencies, authorization to purchase equivalent services or products described herein at the same submitted unit bid price, but only with the consent of the contractor awarded the contract by the County.



## SECTION 3 SCOPE OF WORK

### 3.1. INTRODUCTION

Clackamas County is seeking Proposals from vendors to provide Employment Land Strategy.

**Please direct all Technical/Specifications or Procurement Process Questions to the indicated representative referenced in the Notice of Request for Proposals and note the communication restriction outlined in Section 2.19.**

### 3.2 PURPOSE STATEMENT

The purpose of the Clackamas County Employment Lands Strategy is to prioritize the marketability of employment lands throughout the County based on six (6) factors of site marketability. These six (6) criteria are based on extensive research and will be the foundation for this Employment Land Strategy. The plan will focus on and be comprised of the following criteria:

1. Refine the level of developmental readiness for each site and work with property owners on obtaining designation as “development ready” which Clackamas County defines as tax lots less than twenty-five (25) acres that are currently for sale or lease and infrastructure is accessible to the site. The goal of certification as “shovel ready” is in line with Business Oregon’s state certification program for tax lots greater than twenty-five (25) acres ready to develop within six (6) months through Business Oregon’s *Industrial Site Readiness & Certification* Program.
2. Optimize cluster analysis data for market potential and related job growth for target areas moving forward considering both short and long-term employment growth. The target areas are as follows:
  - a. Advanced Manufacturing – Metals & Machinery
  - b. Professional Business Services
  - c. Wood Products Manufacturing
  - d. Wholesale Trade – the connection between producers with distributors and retailers in a cost-effective manner.
  - e. Advanced Technology – High Tech
  - f. Health Care
  - g. Food & Beverage Processing
  - h. Agriculture & Food Production
  - i. Software & Media Production
3. Design development timing to include an analysis of the public investment including water, sanitary, sewer, stormwater, transportation, environmental analysis, and cleanup. Evaluation of the brownfield remediation constraints across each of the sites. An updated analysis of the feasible zoning options of sites due to slope mitigation and parcel size constraints.
4. Update the economic analysis and financial feasibility of the employment lands for acreage and employment capacity. Understanding the submarket demand for employment lands based on the following criterions:
  - a. Proximity to business’ client base or facilities needed for use on a regular basis
  - b. Availability of labor

- c. Accessibility for workers
  - d. Proximity to employee amenities
  - e. Housing costs in the surrounding communities
  - f. Comparative rents
  - g. Real estate taxes, which can vary not only by submarket but also by municipal jurisdiction
  - h. Impact fees levied in selected jurisdictions
5. Build a marketing and implementation strategy, to grow market awareness of opportunities within Clackamas County for landowners, brokers, and community development professionals in order to promote the growth of key industry clusters. The three (3) basic elements of a community-led marketing strategy include:
- a. Awareness building through a communications campaign
  - b. Enlisting the support and advocacy of resident companies
  - c. Education of local and regional offices
6. Existing building evaluations of underutilized buildings within Clackamas County. Evaluate reuse options for large industrial building for potentially large data centers, back-office operations, and light manufacturing/high tech research and development.

The Employment Land Strategy will allow Clackamas County to more precisely evaluate the inventory sites and to increase the inventory of land with a more thorough understanding of site readiness. Additionally, this will allow Clackamas County to develop a strategy to leverage investments in public infrastructure to improve the readiness of targeted industry development sites and to identify sites beneficial to transportation infrastructure investments. This strategy will be a reference for the stakeholder's outreach program and help keep community leaders informed to better coordinate future efforts of business development and recruitment. This will create the infrastructure to increase the inventory of 50 to 100 plus acre sites.

Decision-ready sites move through a new decision-ready designation before they become certified. A decision-ready designation is a fast-track tool that allows site owners and communities to quickly assess the readiness of their industrial sites and the primary tenets of certification. While the decision-ready designation does not offer the 180-day employment-ready guarantee, it does reduce the risk for potential developers while also helping communities in the state make policy and investment decisions.

Business Oregon's *Industrial Site Certification* program is recognized as one of the most comprehensive shovel-ready programs in the country. It is a rigorous program that is trusted by the market and has been a factor in many of the state's largest employment successes. Oregon certified sites are ready for construction within six (6) months or less and are certified "project-ready" for specific industry profiles.

### **3.3 BACKGROUND**

Clackamas County participated in the Regional Industrial Site Readiness Report produced by Group Mackenzie, now Mackenzie, in 2012 through partnering with Business Oregon, Metro, NAIOP – Commercial Real Estate Development Association Oregon Chapter, Port of Portland, and Portland Business Alliance. The report examined the current and near-term supply of large (+25 acres) industrial sites available to accommodate the expansion of existing employers and recruitment of potential new employers into the Portland metro region.

After participating in this regional work, Clackamas County Business & Economic Development began work on Phase I of the Clackamas County Strategically Significant Employment Lands Project conducting an inventory of employment lands county-wide and analyzing the readiness of sites; providing a more in-depth understanding of the land availability and establishing a supply of development-ready employment sites. Phase I work was completed internally by County staff and including the following:

- a. Vacant Lands Inventory:
  - i. County-wide vacant employment lands inventory
  - ii. Identification of 15+ acre development opportunity sites
- b. Site Evaluation/Analysis:
  - i. Site conditions analysis (by parcel)
- c. Outreach:
  - i. Community outreach to garner support and participation of the project
  - ii. Agency meetings to garner support and participation in the project
  - iii. Property owners meetings to discuss project and receive commitment
- d. Mapping Tool – Site Search:
  - i. Development of an online mapping tool to provide site selectors, prospective businesses, and developers with the ability to search for and receive information on employment lands in the inventory as well as data reports for each site.

Clackamas County also completed the Strategically Significant Employment Lands Project in 2014, through a grant from Metro, and hiring a consultant team comprised of Mackenzie, Johnson Economics, FCS Group, Apex, and Iron Wolf Community Resources. The project builds on the phase I work and identified twenty-one (21) employment sites selected by the County for analysis. Each development opportunity site was identified by opportunities and constraints, estimated costs, timeline, and process for project readiness and a targeted marketing campaign. Clackamas County Strategic Significant Employment Plan will be an updated analysis that builds on the prior projects, producing a vital document for bringing new investment and jobs to the employment opportunity sites within the community.

In 2016, Clackamas County continued to build on the employment land project. The County evaluated sites under the twenty-five (25) acres because of significant impacts as recognized in the marketplace. Due to the demand for large aggregated parcels of twenty-five (25) acres or greater, these sites studied individually to determine their developmental readiness. This report evaluated and prioritized twenty (20) development sites in the Clackamas County Employment Land Asset Mapping Inventory which combined one hundred, forty-eight (148) tax lots totaling approximately nine hundred, fifty (950) acres. These sites were then refined into tier levels based on their readiness, brownfield, sewer, water, stormwater, mobility, and willingness of the owner to transact.

Further, Clackamas County working with FCS Group, Urban Geographic's, and Mackenzie's data, developed a study area of "higher and better" use within the I-205/224 corridor. This study area provides information to staff showing the leading underperforming "land assets" within the study area corridor. This will allow for future sites to be identified for outreach to individual property owners interested in pursuing near-term development.

### **3.3. SCOPE OF WORK**

#### **3.3.1. Project Description:**

The inventory of employment lands completed in the prior reports identified twenty-one (21) development sites chosen based on developmental readiness. The Employment Lands Strategy builds on the identified twenty-one

(21) sites and will assess development readiness for the sites. The sites are grouped into tiers based on the developmental readiness of the sites. The tiers are as follows:

- Tier 1 Site “Market Ready” – Site available for trade-sector opportunities in the near term.
- Tier 2 Site – Site available for facility construction between seven (7) and thirty (30) months.
- Tier 3 Site – Site available for facility construction beyond thirty (30) months.

The employment sites in the County are in varying states of readiness, requiring regulatory approvals (permitting mitigation), infrastructure (sewer, water, and transportation), parcel aggregation, and brownfield cleanup.

**The employment Lands Strategy analysis is focused on the following outcomes:**

1. Development Site Readiness Plan
  - a. Identification of required investment, policy actions, and time to become ready
  - b. Continue to evaluate existing inventory and identify potential new sites of twenty-five (25) and fifty (50) plus acres
  - c. Historical net absorption
  - d. Replacement demand for manufacturing and warehouse buildings
2. Develop a strategy to target investments in public infrastructure to improve the readiness of targeted employment clusters
  - a. Case studies
  - b. Local improvement districts
  - c. Historical net absorption for target clusters
  - d. Replacement demand for target clusters
3. Industry stakeholder outreach program to inform community leaders of the plan
  - a. Community economic development partners
  - b. Business Oregon
  - c. GPI
  - d. NAIOP
4. Marketing and implementation plan
  - a. Communication campaign
  - b. Stakeholder support of resident companies
  - c. Education of local, regional, and state officials

**3.3.2 Scope:**

1. Develop Site Readiness Plan:
  - a. Site evaluation and tiering (similar to methodology as Regional Industrial Site Readiness)
  - b. Develop characteristics, issues, and constraints
  - c. Develop estimated cost, process, and timeline
2. Update inventory and identify potential new sites by Business Oregon
  - a. Evaluate current inventory for potential market opportunities
  - b. Identify fifty (50) to one hundred (100) acre opportunities
3. Case studies and local improvement districts:
  - a. Research case studies in the region to present opportunities for site aggregation
  - b. Feasibility of studies of local improvement districts for targeted area
  - c. Research and development of land bank opportunities
  - d. Mobility studies for potential aggregated sites
4. Target industry analysis:

- a. Economic and employment trends analysis
  - b. Supply and demand for target industries
  - c. Opportunities and challenges
  - d. 3-D modeling concept plan
  - e. Estimated cost to develop
5. Industry cluster impact analysis:
- a. Market feasibility analysis:
    - i. Rent trends
    - ii. Vacancy rates
    - iii. Lease terms
  - b. Economic and fiscal impact analysis
6. Marketing and implementation plan
- a. Develop marketing strategy:
    - i. Site-specific strategy-drone video
    - ii. Target industry strategy by development area for infrastructure funding mechanisms
  - b. Develop economic development materials for distribution
  - c. Design outreach and marketing implementation plan
  - d. Estimated budget, implementation process, and timeline

**3.3.4 Deliverables and Anticipated Outcomes:**

1. Detailed concept and development plans for each opportunity site.
2. Development sites ranked in terms of readiness.
3. Actions necessary to ensure State Decision Ready status.
4. Target industry analysis report identifying industry sectors best suited for the development site.
5. Marketing strategy to promote state certified and decision-ready opportunity sites.
6. Presentation of studies and recommendations to public officials.
7. Marketing prospectus for each development opportunity site.

**3.3.5 Clackamas County Services:**

Clackamas County has a project management team comprised of representatives from Economic Development, Planning, GIS, and Technology Services. This team will provide subject matter expertise and services to support the tasks identified above. The following services and materials will be provided to consultants and should not be included in the project proposal:

1. All GIS services and mapping will be completed by Clackamas County GIS staff.
2. County will provide Economic Landscape materials which identified the eleven (11) key industries for Clackamas County.
3. County will provide Phase I materials, Strategically Significant Employment Lands project and findings, maps, etc., for use in completing project tasks in an effort to prevent duplication of efforts.

**3.3.6. Project Timeline:**

**March 1, 2018 through June 30, 2018** – Update the current infrastructure cost data to assist in advocating for necessary policy funding for State programs such as local improvement districts, bonding finance opportunities, and land bank authorities.

**July 1, 2018 through June 30, 2019** – Refine aggregated site areas within Clackamas County to assist cluster and corridor development in targeted areas. Analysis of one vertical development within an employment industrial corridor. Identifying these cluster areas and corridors for the land that will allow staff to rank and market key sites for potential land productivities.

**July 1, 2019 through June 30, 2020** – Identify with agencies opportunities for aggregation tools and case studies that could allow the targeted cluster areas to potentially be developed within Clackamas County.

**July 1, 2020 through June 30, 2021** – Building on the Employment Land’s Strategy advocate for land use regulations, incentives, or investments that would be appropriate to leverage desired private investment and to create a positive public return.

**July 1, 2021 through June 30, 2022** – Implementation of proposed regulations, incentives, or investments for the Employment Lands Strategy. Continued identifying the updating of potential employment lands.

**3.3.7 Budget:** The County has identified a budget of \$40,000.00 per year over the five (5) year term of the contract, for a total contract value of \$200,000.00 for the overall project. However, that budget should not be construed by Proposers as the default fee proposal. The County endeavors to obtain the best value it can for the quality and quantity of the work to be provided under the resulting contract.

**3.3.8 Sample Contract:** Submission of a Proposal in response to this RFP indicates Proposer’s willingness to enter into a contract containing substantially the same terms (including insurance requirements) of the sample contract identified below. No action or response to the sample contract is required under this RFP. Any objections to the sample contract terms should be raised in accordance with Paragraphs 2.2 or 2.3 of this RFP, pertaining to requests for clarification or change or protest of the RFP/specifications, and as otherwise provided for in this RFP. This RFP and all supplemental information in response to this RFP will be a binding part of the final contract.

The applicable Sample Professional Services Contract for this RFP can be found at <http://www.clackamas.us/bids/terms.html>.

Professional Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is Authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.

## SECTION 4 EVALUATION PROCEDURE

- 4.1** An evaluation committee will review all Proposals that are initial deemed responsive and they shall rank the Proposals in accordance with the below criteria. The evaluation committee may recommend an award based solely on the written responses or may request Proposal interviews/presentations. Interviews/presentations, if deemed beneficial by the evaluation committee, will consist of the highest scoring Proposers. The invited Proposers will be notified of the time, place, and format of the interview/presentation. Based on the interview/presentation, the evaluation committee may revise their scoring.

Written Proposals must be complete and no additions, deletions, or substitutions will be permitted during the interview/presentation (if any). The evaluation committee will recommend award of a contract to the final County decision maker based on the highest scoring Proposal. The County decision maker reserves the right to accept the recommendation, award to a different Proposer, or reject all Proposals and cancel the RFP.

Proposers are not permitted to directly communicate with any member of the evaluation committee during the evaluation process. All communication will be facilitated through the Procurement representative.

**4.2 Evaluation Criteria**

<u>Category</u>	<u>Points available:</u>
Proposer's General Background and Qualifications	0-25
Key Staff	0-25
Scope of Work	0-25
Fees	0-25
<b>Available points</b>	<b>0-100</b>

- 4.3** Once a selection has been made, the County will enter into contract negotiations. During negotiation, the County may require any additional information it deems necessary to clarify the approach and understanding of the requested services. Any changes agreed upon during contract negotiations will become part of the final contract. The negotiations will identify a level of work and associated fee that best represents the efforts required. If the County is unable to come to terms with the highest scoring Proposer, discussions shall be terminated and negotiations will begin with the next highest scoring Proposer. If the resulting contract contemplates multiple phases and the County deems it is in its interest to not authorize any particular phase, it reserves the right to return to this solicitation and commence negotiations with the next highest ranked Proposer to complete the remaining phases.

## **SECTION 5 PROPOSAL CONTENTS**

### **5.1. Vendors must observe submission instructions and be advised as follows:**

**5.1.1.** Complete Proposals may be mailed to the below address or emailed to [Procurement@clackamas.us](mailto:Procurement@clackamas.us). The subject line of the email must identify the RFP title. Proposers are encouraged to contact Procurement to confirm receipt of the Proposal. If the Proposal is mailed, an original copy and an electronic copy (on compact disk or jump drive) must be included. The Proposal (hardcopy or email) must be received by the Closing Date and time indicated in Section 1 of the RFP.

### **5.1.2.** Mailing address including Hand Delivery, UPS and FEDEX:

Clackamas County Procurement Division – Attention George Marlton, Director  
Clackamas County Public Services Building  
2051 Kaen Road  
Oregon City, OR 97045

**5.1.3.** County reserves the right to solicit additional information or Proposal clarification from the vendors, or any one vendor, should the County deem such information necessary.

### **Provide the following information in the order in which it appears below:**

### **5.2. Proposer’s General Background and Qualifications:**

- Description of the firm.
- Description of providing similar services to public entities of similar size within the past five (5) years.
- Description of the firm’s ability to meet the requirements in Section 3.
- Description of what distinguishes the firm from other firms performing a similar service.

### **5.3. Key Staff**

- Credentials/experience of key individuals that would be assigned to this project, including financial modeling staff.
- Provide public resumes for each member of the proposed consultant team.

### **5.4. Scope of Work**

- Detail how your firm would represent a transportation model for public use.
- Provide examples of a Sources & Uses for Infrastructure Funding between \$5 and \$20 million dollars.
- Provide an example of a market demand and supply analysis for an employment area study.
- Describe how your firm would present a development capacity study for the employment area of interest.
- Provide an example of a detailed timetable for the proposed project.
- Provide a sample detailed scope of work based on Section 3.
- Detail how your firm will approach to overall project cost control.
- Provide a detailed cost allocation summary.

### **5.5. Fees**

Fees should be on a time and material with a not to exceed fee basis. Fees should be sufficiently descriptive to facilitate acceptance of a Proposal. List the not-to-exceed amount you propose for the service. Fees and fee schedules should outline all estimated expenses, hourly rates for all assigned individuals, anticipated travel, other reimbursable expenses.



**5.6. References**

Provide three (3) references from clients your firm has served similar to the County in the past three (3) years, including one client that has newly engaged the firm in the past thirty-six (36) months and one (1) long-term client. Provide the name, address, email, and phone number of the references.

**5.7. Completed Proposal Certification (see the below form)**

**PROPOSAL CERTIFICATION**  
**Employment Land Strategy**

Submitted by: \_\_\_\_\_  
(Must be entity's full legal name, and State of Formation)

The undersigned, through the formal submittal of this Proposal response, declares that he/she has examined all related documents and read the instruction and conditions, and hereby proposes to provide the services as specified in accordance with the RFP, for the price set forth in the Proposal documents.

Proposer, by signature below, hereby represents as follows:

- (a) That no County elected official, officer, agent or employee of the County is personally interested directly or indirectly in this contract or the compensation to be paid hereunder, and that no representation, statement or statements, oral or in writing, of the County, its elected officials, officers, agents, or employees had induced it to enter into this contract and the papers made a part hereof by its terms;
- (b) The Proposer, and each person signing on behalf of any Proposer certifies, in the case of a joint Proposal, each party thereto, certifies as to its own organization, under penalty of perjury, that to the best of their knowledge and belief:
  - 1. The prices in the Proposal have been arrived at independently, without collusion, consultation, communication, or agreement for the purpose of restraining competition as to any matter relating to such prices with any other Proposer or with any competitor;
  - 2. Unless otherwise required by law, the prices which have been quoted in the Proposal have not been knowingly disclosed by the Proposer prior to the Proposal deadline, either directly or indirectly, to any other Proposer or competitor;
  - 3. No attempt has been made nor will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restraining trade;
- (c) The Proposer fully understands and submits its Proposal with the specific knowledge that:
  - 1. The selected Proposal must be approved by the Board of Commissioners.
  - 2. This offer to provide services will remain in effect at the prices proposed for a period of not less than ninety (90) calendar days from the date that Proposals are due, and that this offer may not be withdrawn or modified during that time.
- (d) That this Proposal is made without connection with any person, firm or corporation making a bid for the same material, and is in all respects, fair and without collusion or fraud.
- (e) That the Proposer shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.
- (f) That the Proposer accepts all terms and conditions contained in this RFP and that the RFP and the Proposal, and any modifications, will be made part of the contract documents. It is understood that all Proposals will become part of the public file on this matter. The County reserves the right to reject any or all Proposals.
- (g) That the Proposer holds current licenses that businesses or services professionals operating in this state must hold in order to undertake or perform the work specified in these contract documents.
- (h) That the Proposer is covered by liability insurance and other insurance in the amount(s) required by the solicitation and in addition that the Proposer qualifies as a carrier insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.
- (i) That the Proposer is legally qualified to contract with the County.
- (j) That the Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, gender identity, national origin, or any other protected class. Nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055.

**(k)** The Proposer agrees to accept as full payment for the services specified herein, the amount as shown in the Proposal.

Resident Bidder, as defined in ORS 279A.120

Non-Resident Proposer, Resident State \_\_\_\_\_  
Oregon Business Registry Number \_\_\_\_\_

Contractor's Authorized Representative:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Phone: (    ) \_\_\_\_\_

e-mail: \_\_\_\_\_ Fax: \_\_\_\_\_

Contract Manager:

Name \_\_\_\_\_ Title: \_\_\_\_\_

Phone number: \_\_\_\_\_

Email Address: \_\_\_\_\_