

C. SCOPE OF WORK

To offset and take into consideration the above factors, the following scope of work is proposed for Phase 2 of this project. The most significant change is the inclusion of a Guiding Principles specifically for Park Avenue and an accompanying Framework Plan into the scope of work. Through the process of identifying the factors limiting investment, the roundtable discussions and feedback from the survey regarding the McLoughlin Area Plan priorities, a more holistic look is needed to identify opportunity sites that could ignite near term development. Focusing only on reviewing the development and design standards for the existing C-3 area will likely not be sufficient to support the type of development that is desired.

Amending the development and design standards for the commercial area within ½ mile of the Park Ave light rail station is only one of many actions that need to be taken to realize the all of the programs and projects identified in MAP. Including Guiding Principles and a Framework Plan will allow the community to discuss if there are opportunities outside of the existing C3 area that would be suited for near term investment that creates a more walkable community.

The purpose of Phase 2 is to maintain and encourage new employment, housing, and retail diversity within the Park Avenue project area. In order to foster private development in the commercial areas that will provide this desired outcome, the following scope of work for the consultant team is recommended. This scope of work builds off the original scope prepared with the RFP issued in September 2018. Almost all of the original scope language is recommended for use in Phase 2, though some of the tasks have been re-ordered for clarity. Recommended additions are shown in **bold** and language that is recommended to be deleted or changed is shown with a ~~strikethrough~~.

SCOPE OF WORK

The successful proposer must demonstrate extensive, innovative experience and ability in engaging and working with the public and stakeholders to develop land use regulations and development strategies that support the community's vision and values.

The consultant team is responsible for providing technical design and development expertise that will reflect the community's vision for development of the Park Avenue project area. The consultant team should provide substantial knowledge regarding the implementation of the following elements that reflect the preliminary key themes of Phase 2 based on community feedback in Phase 1:

- **Focus the project on the area ½ mile from the light rail station**
- **Enhance connectivity**
- **Encourage employment along McLoughlin Blvd**
- **Increase workforce housing**
- **Focus on the side streets first for development**

- **Natural areas are an asset, not a barrier**

The project will be led by the consultant team, with support from County and Metro staff, community members and stakeholders, **The project will be led by the Grant Management Team (GMT), which consists of the consultant team, County and Metro staff, and MAP-IT Chair**, grounded in the community vision and values as described in the following documents:

- McLoughlin Area Plan Phase I (MAP 1) -- McLoughlin Area Plan Vision Framework (<http://www.clackamas.us/mapit/documents/map1visionframeworkfinal.pdf>)
- McLoughlin Area Plan Phase II (MAP 2) -- MAP Phase II Report (<http://www.clackamas.us/mapit/documents/map2reportfinal.pdf>)
- The Five Components of the McLoughlin Area Plan (<http://www.clackamas.us/mapit/documents/fivecomponents.pdf>)

The consultant will be expected to work closely with the community to implement the public engagement plan **and complete the following scope of work.** ~~identify existing conditions; draft, refine and test development and design standards; and produce Zoning & Development Code amendments and related materials to implement the standards.~~

Task 2-1: Project Management

The consultant team will work with **the GMT** ~~with a team of community members as well as County and Metro staff. County and Metro staff will offer technical assistance to the project team~~ to ensure that project work is well aligned with Metro grant funding and objectives. The consultant team will designate a Consultant Project Manager to work with the team to ensure successful completion of all phases of the project. At the outset of Phase II, the Consultant Project Manager will work with the team to establish a mutually agreeable schedule for project management check-ins and broader community meetings. This will help to ensure a smoothly managed project that delivers clear and expected results within budget and timeframe, and that meets requirements for Metro grant funding.

The consultant team will produce and implement the following project management tools:

Deliverable 2-1.1 – Finalized Phase II project milestones and meeting schedule including dates and objectives for all established project check-ins, milestones, and meetings.

Deliverable 2-1.2 – Participation and facilitation of calls/meetings with project team, partners, or community.

Deliverable 2-1.3 –Written summaries of calls/meetings including outcomes and assigned action items.

Task 2-2: Equitable Public Engagement Strategy

As outlined in Memo 2, Phase 1 expanded the contact list of interested Park Avenue project area community members. The process also established preliminary key themes of common interests and priorities among all commercial and residential interests. This information and outreach set a strong foundation for additional engagement including with under-represented groups and interests.

Based on the research and recommendations in Phase 1, the consultant shall prepare a final engagement strategy as directed by the Board of County Commissioners. Implementation of the strategy should include:

- Use of engaged community members to assist with outreach events and strategies to draw in a wider public;
- Various interactive engagement techniques, including hands-on exercises to engage and educate stakeholders about the relationship between walkability, density, public safety and parking, about sustainable systems design practices and reporting back to participants so that the community can see how their comments have been reflected in the development and design standards;
- Efforts to involve people from under-represented populations (including people with disabilities, racial and ethnic minorities, low-income people, and people of all ages); and
- Specific practices to help ensure that participants feel their views and ideas have been heard, even if not adopted.

Equitable Engagement

Meaningful and necessary engagement should occur throughout the project. Defining how the Park Avenue project area develops should include as many various perspectives as possible. In order to effectively engage the diverse population identified in Memo 1, as well as the under-represented communities, significant collaboration with the Oak Grove Elementary School will be needed to reach the desired population and address issues pertaining to their children that allow for meaningful engagement. Furthermore, several residents within the Park Avenue community expressed a desire to lead more tactical outreach with surrounding residents such as “door knocking” with project information and community events such as BBQs in the transit plaza. Phase 2 will need to intentionally engage these volunteers and allocate resources to community events that will not only enhance project understanding, but enhance social connections throughout the project area. Finally, the organizations listed in Memo 1 will be engaged to assist with outreach to the broader community.

The consultant team in Phase 2 will allocate time to managing local residents to implement the actions outlined above. Additionally, the community stakeholders within the ½ mile radius are encouraged to work with Clackamas County staff to potentially secure grants to bring in national speakers regarding outcomes associated with the identified key themes.

Deliverable 2-2.1 – Final Equitable Public Engagement Strategy

Governance Structure

The Park Avenue Community Advisory Committee (PACAC) will have a direct relationship with the consultant. The consultant will be responsible for working with the GMT, Technical Advisory Committee (TAC) and the Park Avenue Community (Community) to prepare the recommended deliverables throughout Phase 2. The PACAC will develop the final recommendation in collaboration with the consultant to the Planning Commission, with

technical support (i.e. staff reports, presentations, etc.) from the GMT. The proposed governance structure for Phase 2 and PACAC membership are outlined in Attachment A.

Task 2-3: Anti-displacement Strategy

New private development is sought after to provide necessary housing and desirable employment and amenities such as restaurants and neighborhood retail that serve the community. It is important to thoughtfully consider how this new investment will increase residential and business rents. There are organizations to engage and programs to implement that can proactively curtail displacement and allow existing residents and businesses to remain in the area if they choose to do so. Phase 2 must include a specific strategy of organizations and programs for the county to engage to preclude displacement. This strategy should be prepared at the outset of the project to engage organizations as early as possible before private investment occurs.

Deliverable 2-3.1 – Anti-displacement strategy for implementation during the project and after adoption of new or revised standards.

Task 2-4: Create Park Avenue Guiding Principles (aligned with MAP)

Phase 1 largely prioritized existing MAP projects and programs established in 2012 as outlined below under Guiding Principles. However, these established principles do not fully consider

- 1) Neighborhood Livability urban design trends and metrics identified in Memo 1 that are needed to achieve desired outcomes such as walkability; and
- 2) Modern planning issues such as disaster resilience, shared mobility, the circular economy, etc. This means issues of sustainable energy, water, waste, food systems, etc. will all come to the forefront as will new designs for the street of the future, new housing types, and new forms of mobility that should be considered.

Updated Park Avenue Guiding Principles are necessary to document the values that the community views as most important. They will be built upon the *Key Themes* presented and discussed with stakeholders at the April 9, 2019 community meeting. These Guiding Principles will provide clarity for the consultant in Phase 2 regarding issues in which there is broad consensus or, conversely, issues which require more education and discussion. The overall intent is to efficiently and effectively utilize the stakeholder input provided to date. Phase 2 should build off the work in Phase 1, not repeat it. Furthermore, Park Avenue Guiding Principles will align with currently adopted MAP Guidelines to ensure consistency in policy direction.

Before embarking on physical design and development standards, the community should be engaged to verify priorities and understand potential trade-offs to achieve them. The Park Ave Community Advisory Committee (PACAC) and community members should provide community education events and other forms of equitable engagement for a variety of

stakeholders to learn about and discuss urban design trends needed to achieve desired outcomes. For example, many stakeholders expressed support for such items as a walkable district or night-time safety on the Trolley Trail without recognizing what is needed to achieve these things: mostly residential density. Residential density provides the rooftops to support development of services. Connectivity helps people get to and from these services, and safety comes from “eyes on the street” forms of development. Some education on how all these things are interconnected and mutually supportive will help people understand trade-offs and desired outcomes.

In addition, identifying actions needed to support increased residential development in the appropriate locations along the Mcloughlin Corridor should be included in this phase of the project.

Deliverable 2-4.1 – **Up to two education workshops to discuss** Report 2: Review of best practices for land use regulations and development in mixed-use zones, with projects, tools and strategies to maximize:

- Transit-supportive development
- Long-term affordability and affordable housing
- Sustainability
- Local economic benefit
- Living-wage work
- Community health
- Natural environment
- Collaboration

Deliverable 2-4.2 Documented Park Avenue Guiding Principles (aligned with MAP) that are unique to the Park Avenue project area and set the foundation for Task 2-5.

Task 2-5: Framework Plan

Once the Park Avenue Guiding Principles are established, it is important to create a graphic “framework plan” that provides clear guidance to the current property owners, business owners and residents, as well as potential new developers, regarding the vision for the Park Ave area. The framework plan will clearly delineate elements on a map such as future pedestrian and bike connections, locations for new housing or employment uses, and how side streets can develop all within the context of the approved Park Avenue Guiding Principles. The framework plan will only be finalized with the support of the PACAC and community members.

To garner support of area land owners and the development community, the framework plan should include development opportunity areas that illustrate site-specific design interventions with supporting development pro formas to ensure that the plan is economically practical, contributes to the creation of a sense of place and makes market sense. This will not only keep the framework plan grounded in market reality, but also serve

as an important tool for property owners to understand how the value of the property will increase with more development opportunities allowed through new design and development standards.

It will also be important to distinguish between the high specificity of a master plan versus the conceptual systems-level detail of a framework plan. The framework plan must be organized for flexibility and to encourage organic, catalytic growth and change. The framework plan should focus on development strategy, urban design principles, potential options for development, design precedents, circulation and parking strategies, and site development vignettes.

Deliverable 2-5.1 – Framework plan graphic showing development opportunity areas, potential connections, public open space opportunities, and types of development and densities.

Deliverable 2-5.2 – Framework Plan incorporating Park Avenue Guiding Principles and information on plan implementation.

Task 2-6: Draft and Refine Development and Design Standards

Development and design standards for the Park Avenue project area can be created that achieve the desired graphic vision and guiding principles. It will be important to include adequate parking and design standards to minimize impacts on residential areas. Furthermore, creating agreements with the Oregon Department of Transportation (ODOT) pertaining to McLoughlin Boulevard will be important to proactively involve ODOT in achieving shared objectives for pedestrian safety that are aligned with automobile and truck mobility.

It is strongly recommended that the new standards are as flexible as possible to allow new uses to enter the area aligned with market conditions. For example, rather than recommending that retail be mandated on the ground floor of all new mixed-use development, it may be more appropriate to mandate “active uses” on the ground floor. These could include retail but could also include community space, day-care, art galleries, small-scale makers’ spaces and a variety of other pedestrian-friendly activities. Regulations should mandate pedestrian activity and walkability through good design that includes lighting, signage, landscape, and building transparency as well as active uses. The regulations should also support the development of residential uses along the corridor.

Deliverable 2-6.1 - Summary of draft standards tested on actual and/or hypothetical sites/opportunity areas in the Framework Plan, with an assessment of how well the standards:

- Illustrate the outcomes and reflect MAP values and community input,
- Are effective in meeting the **Park Avenue Guiding Principles** developed in Task 2.4.2 development goals as outlined in 9.1 (and/or refined through the public process),
- Respond to the real estate market / developer needs while maintaining the integrity of the community vision and values for new development; and

- Are economically feasible for the preferred development types (including a feasibility analysis of actual or hypothetical sites to test the economic viability of proposed standards)

The expected outcome of Task 2-6 is to have proposed amendments to the Zoning and Development Ordinance that:

- Are enforceable, realistic and, as appropriate, incremental;
- Provide a clear path to achieving community goals;
- Are outcome-based;
- Reflect the input from and are widely-supported by developers, property owners and the public,
- Incorporate lessons learned from tests on actual or hypothetical sites;
- Are consistent with best practices, opinions and findings discovered in Phase 1 and throughout the Phase 2 process, including the findings of the Phase 1 Neighborhood Livability assessment, and the McLoughlin Area Plan (MAP) community values and vision, and
- Facilitate incremental shifts toward the intended development goals for the area.

Deliverable 2-6.2 – Proposed development and design standards report including proposed zoning codes, map amendments, and outline of process necessary for adoption.

Task 2-7: Implementation

The expected outcome for Task 2-8 is clear communication and understandable materials to facilitate adoption and implementation of the new design and development standards. In addition, the implementation framework report is expected to provide guidance on any other recommended activities the County and community can take to support desired development in the area, taking into account findings from the Phase I livability assessment for nearby residential areas. The consultant team will produce the following deliverables:

Report 4: Implementation Framework Report that outlines steps that can be taken to support the implementation of the community goals through the new Park Avenue Station Area development and design standards. This should include prioritized strategies and policies that will deliver results consistent with the community values.

The report should also include tools the community can use to measure progress toward achieving the development outcomes and understand how they relate to the original goals of the community that were developed in MAP and throughout this process. These tools should include information on:

- meeting community goals through development,
- the type and quantity of development occurring that implements the standards,

• a way to record how market dynamics have influenced the rate of development Finally, the Implementation Framework Report should include a base template for community engagement and development and design standards for planning future nodes along McLoughlin Boulevard.

Deliverable 2-8.1 – Action plan of specific projects or programs necessary to implement the Framework Plan. Action plan will identify a specific organization and roles responsible for leading project completion, timeframe and metric.

Deliverable 2-8.2 – Phase II: Presentation to the Board of County Commissioners. The materials presented to the BCC shall include the following reports:

- **Anti-displacement Strategy**
- Public Engagement Report – A comprehensive public engagement report that documents the engagement process undertaken and reports on performance measures to describe the success of the public engagement plan. Report should include all visual communications, graphic materials and meeting summaries.
- **Park Avenue Guiding Principles and Framework Plan** Best Practices in Mixed Use Zones
- Summary of Proposed Development and Design Standards - Adoption-ready maps and code text amendments for the Planning Commission and County Commission, including County Zoning & Development Ordinance amendments to implement the proposed development and design standards, and recommended zoning and other policy changes to support future development and livability.
- **Action Plan**