

REQUEST FOR PROPOSALS

for
FINANCIAL ENGINEERING SERVICES
for the UPDATE of
SYSTEMS DEVELOPMENT CHARGES.
9/10/2008

City of West Linn
ADVERTISEMENT

Announcement

The City of West Linn requests proposals from individuals or firms qualified in financial engineering services to update the water and streets System Development Charges (SDCs) in conjunction with completion of the new Water Master Plan (WMP) and the Transportation System Plan (TSP). The requested services will assist the City in implementing the two new master plans. The project scope in general includes: review of existing water and street utility financial information, review of water system and transportation network master plans, evaluate the new Capital Improvements Projects list (CIP) and the project allocation, evaluate various suggested methodology changes, prepare documentation supporting the methodology changes, calculate revised SDCs resulting from the modified methodologies, provide draft and final reports, and participate in at least two public meetings at which the adoption of the proposed SDC modifications will be considered. The anticipated scope of work for this project will require expertise in financial, legal, and engineering fields. The consultant(s) must be familiar enough with ORS 223 to provide a document that will pass legal review by the City of West Linn City Attorney and prepare a methodology report and SDC tables, present results to City staff review and to City Council for adoption. Deliverables must be ready for adoption within 120 days of Notice to Proceed.

Complete RFP available

Proposals must adhere to requirements set forth in the complete RFP document available upon request. Requests for the complete RFP may be directed to: Dennis E. Wright, P.E., City of West Linn, 22500 Salamo Rd. #800, West Linn, OR, 97068, 503-722-5514, Fax 503-656-4106, e-mail:

dwright@westlinnoregon.gov or may also be obtained on the City of West Linn website:
<http://westlinnoregon.gov/publicworks/rfp-financial-engineering-services-update-sdcs>

If you wish to receive any possible future addendums for this project, please email prich@westlinnoregon.gov with your name, address, phone, fax and email address or call 503-722-5501 to be placed on the plan holders list.

Time and Place to Submit Proposals

Five copies of the proposal must be received by **4:00pm on the 10th of October 2008**. Proposals submitted after the above stated time will not be considered. All proposals accepted by the City of West Linn shall remain valid for a period of **90** calendar days from the date accepted by the City.

Published: DJC – Wednesday & Friday, September 10th and 12th, 2008

1. General Description of Work

Professional services including review of City's financial data, water system and transportation network master plans, preparation of Systems Development Charge (SDC) methodology evaluation, analysis, and calculation of revised fees for water, transportation.

The City will require the consultant to consider the latest SDC methodology guidance from Metro (<http://www.oregonmetro.gov/index.cfm/go/by.web/id=26684>) and include any aspects beneficial to the City into the proposed methodology. A copy of the City's standard professional services contract is available for review upon request.

2. Time and Place to Submit Proposals

Proposals for the work described herein shall be submitted to:

Dennis Wright, Engineering Manager	503-722-5514
City of West Linn	fax 503-656-4106
22500 Salamo Road #800	email: dwright@westlinnoregon.gov
West Linn, OR, 97068	

Five copies of the proposals must be received by **4:00pm on the 10th of October 2008**. Proposals received after the above-mentioned time will not be considered. All proposals accepted by the City of West Linn shall remain valid for a period of **90** calendar days from the date accepted by the City.

3. Selection

One personal services contract will be awarded based upon the proposal submitted along with consideration given to the financial and engineering economics experience and expertise of the proposed staff, experience with State of Oregon SDC statutes, availability of proposed staff, price of the proposed services, and upon recommendations and comments of firms' prior clients. Selection will be made by a committee of the City's managers and an elected official and will be in conformance with public contracting rules established by the City of West Linn. Work completed under this contract shall become the property of the City upon acceptance and final payment and the Consultant shall relinquish all rights thereto.

The City reserves the right to accept any proposal, or reject any or all proposals, depending upon which appears to best serve the interest of the City. Any consultant making a proposal that is not selected and is aggrieved, may request an explanation and if still not satisfied, shall have the opportunity to appeal the decision to the Public Works Director who shall make the final decision.

4. Project Time Schedule

The City desires to have a completed SDC report ready for commencement of the public notification and adoption process by March 10th, 2009.

5. Payment

This will be a "not to exceed dollar amount" time and materials contract. Payment will consist of monthly distributions based upon billings or other arrangements as mutually agreed.

DEFINITIONS

Whenever the term "Consultant" is used herein, it is understood to mean the company awarded the contract for work described herein or its authorized representative and the term "City" means the City of West Linn or its authorized officer.

SCOPE OF WORK AND WORK PRODUCT DESCRIPTION

In general the scope of work will consist of the following:

1. Data Collection and Review and Kickoff Meeting.

- a) Provide a data needs list to the City. Meet with City staff to collect and discuss initial data, review the work plan and schedule, discuss policy and technical issues, and kickoff the study.

2. Develop and Complete Technical Analyses.

- a) Compile the SDC project list. Using the recently completed TSP and WMP, and the input of City staff, the consultant will compile the list of projects and costs to be used as the initial improvements fee basis.
- b) Review and evaluate latest Metro SDC methodology recommendations and determine if any may be of benefit to the City.
- c) Allocate project costs to growth. Using information provided in the plan and the input of City staff, the consultant will estimate the capacity-increasing portion of each project for inclusion in the improvement fee. This will serve as the improvement fee cost basis.
- d) Determine the reimbursement fee cost basis (if applicable). Using City asset information, policy input from Task 1, and staff input, the consultant will estimate the amount of eligible unused capacity in the existing transportation and water systems for use in the calculation of the SDC reimbursement fees.
- e) Calculate the improvement fee from information on the eligible cost of planned future facilities. Calculate the reimbursement fee, as applicable, from

- information on the cost of unused capacity in existing infrastructure.
- f) Meet with City staff to review findings

3. Documentation.

- a) Prepare draft methodology reports, one each for water and transportation, describing policy recommendations, methodology, and results for review by City staff.
- b) Prepare public notifications summarizing analyses and recommended changes for distribution by City.
- c) Provide one hardcopy and digital files (in MS Office format) of final report for distribution and use by the City after public process (Task 4).

4. Public Process.

- a) Prepare for and attend up to two meetings with the City Council, expected to be a worksession and the SDC adoption public hearing.

INFORMATION/SUPPORT TO BE FURNISHED BY THE CITY

In order to assist the consultant, City staff will furnish the following information or assistance:

1. Copies of previous SDC work accomplished for the City as requested by the Consultant and available from the City.
2. Copies of the most current water and transportation systems master plans and adopted SDC project lists.
3. Current development status and projected buildout figures.
4. Financial information regarding balance of various utility SDC accounts and status of outstanding SDC credits by category.
5. City staff shall review and approve all work prior to final acceptance and provide direction concerning specific recommendations.
6. Other information/support/assistance as determined to be necessary by the City's Project Manager.

PREPARATION OF THE PROPOSAL

The proposal submitted for consideration shall contain a description of the company requesting the work, its place of business and telephone number, the company's project representative and personnel to be assigned to the project, a proposed scope of work and associated cost. Include with the proposal a description of the financial, engineering, and legal experience and expertise of the staff members that will be assigned to the project along with list of current and former clients for whom your firm has performed similar work. The experience/expertise information can be in resume format and should include a listing of projects similar to the project described herein in both size and scope.