

Intermediate Procurement for Personal Services to Facilitate Community Workshops

INTRODUCTION

The City of West Linn is soliciting proposals from qualified firms (“Proposers”) to facilitate two (2) to four (4) community citywide workshops that will complete, inform and infuse the final updated version of the Sustainable West Linn Strategic Plan (“Plan”). The budget for the project cannot exceed \$10,000. The updated Plan will use the Natural Step principles of sustainability¹ as a framework. Several public “Civic ecology – resiliency” workshops will be held as part of the plan update. The selected proposer will be expected to work with the Sustainability Advisory Board (SAB) and City staff through the completion of the community workshops and final report to City Council.

BACKGROUND

A city of hills, trees and rivers, West Linn lies about 15 miles south of Portland, Oregon and encompasses eight verdant square miles along the Willamette River. Its population of over 25,000 residents is largely college-educated. Over a third of businesses in the suburban city are home-based. West Linn’s median household income is over \$84,000, and the overwhelming majority of residents are homeowners. In a recent survey, 85% of residents rated West Linn as a convenient location and great place to live, with good schools, low crime, friendly people and good city services.

For nearly a decade, sustainability has been part of the West Linn landscape. In July 2005, the City Council formed a task force of nine citizens with expertise in different aspects of sustainability. The Task Force grappled with the comprehensive and interconnected nature of sustainability and looked for ways to make sense of the wide range of issues and principles. After reviewing a number of the existing sustainability frameworks that help people understand sustainability, the Task Force blended the best elements of a couple frameworks to make the Plan.

In 2008, West Linn City Council established the Sustainability Advisory Board to provide recommendations and citizen input for the implementation of the Sustainable West Linn Strategic Plan.² Over the past six years, the Plan has served primarily as a road map for greening the City’s internal operations. A Green Team of city employees from various departments was established in 2008 to reduce the environmental impacts of City operations.

What has West Linn accomplished so far on its path toward sustainability? To date, West Linn has completed baseline energy audits of City facilities and has implemented energy-savings measures. A baseline waste audit at City Hall was conducted in 2010. The City has augmented its fleet with hybrid vehicles. West Linn adopted a LEED green building standard for new City facilities, and West Linn’s new police station is being built to meet LEED Silver standards. An

¹ See <http://www.naturalstep.org/the-system-conditions>.

² See ordinance at <http://westlinnoregon.gov/sustainability/ordinance-creating-sustainability-advisory-board>.

environmentally preferable purchasing policy is in the works. The SAB has also been instrumental in hosting both a Sustainability Lecture Series and several Solar Home Tours.

The seven year-old Plan is now in the process of being updated so that it can more clearly guide the City as it conducts its business and influence actions of stakeholders so that West Linn can achieve a sustainable future. The current document, divided into stakeholder implementation sections, has a fair amount of redundancy and causes some confusion for readers. One of the goals for this update is to be more succinct and user friendly for all the stakeholders, including City Council, planners, neighborhood associations and local businesses, to name a few.

In 2012, City Council approved the SAB's recommendation to update the Plan based on the Natural Step framework for achieving sustainability. The updated Plan will also include SMART goals³. One of the goals for the community workshops is to establish connections with community-based organizations to assist with or champion the implementation of strategies that include stakeholders beyond City Hall so that sustainability can become entrenched as an underpinning for the viability of the whole community in ways that are:

- strategic,
- systems focused,
- aligned with nature's cyclic processes,
- tied to the triple bottom line of social, economic and environmental benefits, and
- clear about how success is defined.

Over the long-term, the SAB envisions taking on the role of coordinating and facilitating the work of Action Teams as they implement components of the updated Plan.

SCOPE OF WORK

The scope of the consultant work, as described in this Section, centers upon the community workshops that will support and inform the updated Sustainability Plan. Additional tasks may be required of the consultant to complete the project details as listed below:

PHASE 1: Establish a plan for the Community Workshops (Fall 2013)

Under the direction of the Sustainability Advisory Board, the consultant(s) will work with the SAB and City staff to:

- Develop a timeline to hold the community workshops. This would include location(s), advertising and agenda(s).
- Facilitate meetings with the SAB for their input on the community workshop process. This would include best practices for participant recruitment strategies.

Anticipated deliverables for Phase 1 Work include:

³ See SMART goal definition at <http://www.projectsmart.co.uk/smart-goals.html>.

1. Preparing a calendar with important community workshop dates, such as the date notices will be distributed and meeting dates,
2. Preparing the notices, advertisements and agendas for all community workshops,
3. Develop outreach strategy, communication plan to include various community organizations.

PHASE 2: Implement Community Workshops

Work involves obtaining public input on the second draft of the updated Sustainability Plan, facilitating a process for prioritizing action focus areas and recommending Action Teams for planning and implementing projects in accordance with the workshop(s) results and the updated Sustainability Plan. Activities will include:

- Facilitation of two (2) to four (4) public forums to introduce the Civic Ecology – resiliency process, develop group consensus on action focus area priorities, determine stakeholders, champions and make recommendations for Action Teams to implement the priorities.
- Implement approved plans for obtaining additional public comment and assess the results.

Anticipated deliverables for Phase 2 Work include:

1. Report on proceedings and outcomes of public forums as well as recommended next steps,
2. Report on additional public comments, including assessment of results and recommendations for the Sustainability Board.

DESIRED QUALIFICATIONS

The successful Proposer will:

- Have experience in developing strategic plans that
 - achieve sustainability at the local government level using the Natural Step & Civic Ecology – resiliency principles as a framework,
 - have measureable goals, and
 - include action plans.
- Have worked on projects related to sustainability planning and implementation at the local government level within the past five years with communities similar to West Linn.
- Be willing to become the current Sustainable West Linn Strategic Plan as well as knowledgeable about key issues affecting the Portland metropolitan area.
- Have business ties to the Portland metropolitan area.

- Be skilled in facilitating public forums, guiding volunteer civic work teams and launching Action Teams.
- Demonstrate excellent written and oral communication skills.
- Have excellent organization and project management skills.

INSTRUCTIONS FOR PROPOSAL SUBMISSION

1. The Proposal must be submitted by **4 p.m. on Monday, October 14, 2013**, include West Linn Community Workshops in the subject line, via email to:

Zach Pelz, Associate Planner
ZPELZ@westlinnoregon.gov
 City of West Linn
 22500 Salamo Road
 West Linn, OR 97068

2. The Proposal shall be a maximum of 12 (8.5" x 11") pages of text in length, printed on recycled content paper with one-inch margins all around and using a minimum 11-point font size. Double-sided pages, with a maximum of 12 pages of text are permissible. Please do not package in report covers or binders.
3. The attached résumés of the Proposer's team are considered an appendix and are not included in the maximum 12-page submittal count. Please do not attach any other additional information.
4. Questions and requests for clarification regarding this Request for Proposals must be submitted via e-mail to Zach Pelz at ZPELZ@westlinnoregon.gov no later than 4 pm Monday September 30, 2013. State: Questions Pertaining to Community Workshops in the subject line.

FORM OF PROPOSAL

The proposal shall be organized in the following order:

1. **Cover Letter** stating the Proposer's desire to make an offer signed by an individual authorized to act on behalf of the firm.
2. **Firm Profile**, including: contact information, size, home office, areas of specialization, years in business and local presence in Portland metro community.
3. **Proposer's Qualifications and Capabilities** for the project, including:
 - a. understanding of strategic planning processes for the development of municipal sustainability plans with measureable goals and outcomes;
 - b. application of Natural Step and Civic Ecology principles to sustainability planning at the local government level;

- c. knowledge of public participation processes and facilitation, with reference to the types, size and outcomes of public forums facilitated;
 - d. advising on how to launch Action Teams to implement action plans;
 - e. experience in working on local government issues in the Portland metro area.
4. **Proposer’s understanding and approach** to accomplish the project work, including any special tools or techniques to be used.
 5. **Proposed Pricing** for the total project, including a separate price for each phase and hourly rates and estimated work hours of all members of Proposer’s team.
 6. **Résumés** of all individuals who will be working directly on the project team (especially lead consultant, and public forum facilitator).
 7. Three **References** from similar projects completed in the past five years. Such projects should include individuals on the Proposer team who will be working on this project. Provide name and location of project, contact person, address, phone and e-mail contact information.

EVALUATION PROCESS

1. The SAB will evaluate each proposal on the following criteria, with weighting and maximum points as follows:

Criteria	Maximum Score
Cover Letter	5
Firm Profile	5
Proposer Qualifications, Capabilities & Team	25
Proposer Understanding & Approach	35
Proposed Pricing	20
References	10
Total Points Available	100

2. If needed the SAB may invite the top ranked Proposers to make a brief oral presentation and/or be interviewed by the evaluation team during the week of October 21, 2013.
3. After evaluation of proposals and any interviews, the SAB will recommend one or more firms to provide the services described herein to the West Linn City Manager for approval and contract development.