Request for Proposal # 1119

Washington Park Strategic Operational Plan Phase 1: Visioning

PROPOSALS DUE: December 17, 2019 by 5:00 pm
SUBMIT TO: rfp@explorewashingtonpark.org
    Explore Washington Park
    4033 SW Canyon Road
    Portland, OR 97221
REFER QUESTIONS TO: rfp@explorewashingtonpark.org
REGISTER: To receive addendums to the RFP, email rfp@explorewashingtonpark.org with your request and contact information.
explorewashingtonpark.org
I. Introduction
Explore Washington Park (EWP) is a 501(c)3 non-profit that works to increase access to Washington Park, as well as improve the park’s overall visitor experience. Washington Park, located in Portland, OR, is a 410-acre destination park that sees over 3.2M visitors each year. EWP works closely with the cultural institutions of the park including the Oregon Zoo, Portland Children’s Museum, World Forestry Center, Hoyt Arboretum Friends, Portland Japanese Garden, and Portland Parks & Recreation, all of whom have director level representation on EWP’s Board of Directors. The goals of the organization are to increase overall park-wide attendance, increase transit use to the park, increase visitor satisfaction, and increase visitors from underrepresented communities.

II. Background/History of Project
In 2012, the directors of Washington Park’s six cultural institutions signed an agreement allowing Portland Parks & Recreation (PPR) to move forward with the installation and management of a park-wide pay-to-park system. These six parties include the Portland Children’s Museum, Oregon Zoo, World Forestry Center, Hoyt Arboretum Friends, Portland Japanese Garden and PPR. One hundred percent of the parking meter revenue is allocated to Washington Park improvements, as approved and prioritized by the six cultural institutions. EWP was incorporated in 2013 as a non-profit to manage the transportation improvements related to this agreement, as well as implement programs to improve overall visitor experience. EWP manages a free intrapark shuttle that links the TriMet Washington Park Light Rail station to the park’s major destinations, a free bus that links the park to overflow parking lots, and customer service programs, such as customer service field staff, and a park wide map and website.

In addition to EWP’s programs, parking meter revenue was allocated to update PPR’s Washington Park Master Plan. The Washington Park Master Plan Update, completed in 2017, addresses the park’s physical space that is owned and managed by PPR and has three key themes: Create Identity, Improve Access, and Enhance Visitor Experience. The plan has a 20-year horizon and recommends park infrastructure improvements for each of these key themes.

Upon the acceptance of the Washington Park Master Plan Update, City Council directed EWP to develop a Transportation Management Plan (TMP) to further study the master plan’s proposed transportation projects. This TMP will respond to both the needs of the cultural institutions and PPR. This inclusive approach will incorporate the goals outlined in the Washington Park Master Plan Update, as well as the goals of the cultural institutions’ strategic plans, to develop a visitor-centered park vision.

This holistic vision will shape the outcomes of the TMP and may highlight the need for technical plans outside of transportation and infrastructure, for example emergency management, visitor services, and wayfinding. To reflect this inclusive approach, the TMP will be known as the Washington Park Strategic Operational Plan (WPSOP).
The goal of the WPSOP is to create a visitor-centric vision for Washington Park and develop the technical plans needed to realize this vision. The Washington Park Strategic Operational Plan will be broken into two distinct phases. The first phase of this plan will help answer the question: “Where do we want to go?” by developing a holistic park vision. The second phase will answer “How will we get there?” by developing the technical plans needed to reach this vision.

III. Budget and Timeline
Timeline: Phase 1 of the WPSOP should take 8 to 12 months and start no later than February 1, 2020.
Budget: Phase 1 should not exceed $100,000

IV. Proposed Scope of Work/Schedule
EWP is seeking proposals from qualified firms to complete Phase 1 of the WPSOP: Visioning. The EWP Board of Directors will be the decision makers in this process and are referred to as “partners.” The entities represented on the Board of Directors include: the Oregon Zoo, World Forestry Center, Portland Children’s Museum, Hoyt Arboretum Friends, Portland Japanese Garden, Portland Parks & Recreation, Travel Portland, Sylvan Highlands Neighborhood Association, Arlington Heights Neighborhood Association, TriMet and an at-large position. External stakeholders, including both park users and non-users, are referred to as “constituents.” While constituents are not decision-makers, their experience with the park will guide the development of the park vision. Successful proposals will provide detailed tactics on how the partners will be involved throughout the project. EWP encourages proposers to include a team of expert facilitators who could continue to work with partners in Phase 2 of the WPSOP. Phase 1 will include the following scope of work:

1. Align Plans and Goals

The park partners all have diverse needs and objectives. The first step of this project is to ensure universal agreement among the partners for the WPSOP’s goals and project deliverables. The next step is to develop an approach for how to engage partners and gather input from constituents. The experience of park constituents, particularly that of underrepresented communities, must be included in developing the park vision.

**Deliverables**
- A research plan to identify existing park conditions and future needs
- A partner engagement plan
- A plan to collect the experience of park constituents, with an emphasis on the underrepresented voice
- A set of agreed upon goals and deliverables for WPSOP: Phase 1
2. **Inform the Vision**: Research and Visualization

Each cultural institution has a unique role in contributing to the holistic park experience. The partners must have an understanding of the needs of each cultural institution’s visitors, employees and strategic plans before understanding the needs of the park as a whole. The completion and presentation of the research plan identified in step one will be the basis for this understanding and could include, but should not be limited to, the following approaches:

- Existing data and document review
- Conditional Use Master Plan: a review of when these are triggered and what they require
- Constituent and cultural institution interviews, projections and future plans
- Employee interviews and shadows
- Visitor observations and gaps analysis
- Ethnographic research
- Expert interviews and presentations, including experts around equity and inclusion, to showcase best practices
- Visitor experience case studies from world class peer entities, i.e. universities, theme parks, urban parks

**Deliverables**

- The completion of the research plan outlined in Step 1
- The creative visualization of findings that tells the park’s story
- A review of the process to-date to ensure the work is focused and not becoming too broad

3. **Define the Vision**

Based upon the research from Step 2, guide partners in the development of a holistic park vision. The process must be collaborative with buy-in from all partners. The vision statement should include immediate (1-5 year) and midterm (5-10 year) strategies to reach this vision. Such strategies may include, but should not be limited to, transportation to and within the park, overall visitor experience, emergency planning, environmental stewardship, and inclusion and equity. The vision and strategies will form the base of the technical aspects of Phase 2 of the WPSOP.

**Deliverables**

- A vision statement and correlating strategies.
- Creative story telling of the vision in an inspiring and sharable format, such as video/presentation.
4. **Fulfill the Vision**: Preparing Phase 2

Develop a scope of work for Phase 2 of the WPSOP. This scope will address the strategies identified in Step 3 and create a list of appropriate experts to bid. Phase 2 of the WPSOP must provide concrete plans on how Washington Park will reach its vision identified in Phase 1.

**Deliverables**     Scope of work for Phase 2 of the WPSOP

V. **Qualifications/Experience**

Proposers shall have the following experience:

(1) Experience working with parks and cultural intuitions, such as zoos, museums and gardens.

(2) Recognized ability to thoughtfully engage diverse stakeholders with fun processes, visual co-creation of desired products at appropriate times.

(3) Experience using multiple methods of emergent design, qualitative research (beyond interviews and focus groups)

(4) Experience in analyzing and developing strategic planning processes directly associated with planning for cultural institutions.

(5) Experience synthesizing and visualizing complex data and plans into a cohesive document.

(6) Experience in story telling

(7) Experience working with culturally diverse stakeholder groups

VI. **Proposal Instructions**

A. **Submission of Proposals**

EWP recommends proposal submission be emailed to [RFP@explorewashingtonpark.org](mailto:RFP@explorewashingtonpark.org). However, written five (5) copies of the proposal can be mailed or hand-delivered to Explore Washington Park, addressed to:

Explore Washington Park
4033 SW Canyon Road
Portland, OR 97221

B. **Deadline**

Proposals will not be considered if received after the date and time indicated on the RFP cover page.

C. **RFP as Basis for Proposals**

This Request for Proposals represents the most definitive statement EWP will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this EWP will not be considered by EWP in evaluating the Proposal. All questions relating to this RFP should be addressed to [RFP@explorewashingtonpark.org](mailto:RFP@explorewashingtonpark.org). Any questions, which in the opinion of EWP, warrant a written reply or RFP addendum will be furnished to all parties receiving this RFP.
D. Information Release
All Proposers are hereby advised that EWP may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release EWP from all claims arising from such activity.

VII. Proposal Contents
The proposal should contain no more than ten (10) pages of written material (excluding biographies, resumes and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below.

It is the proposer’s responsibility to ensure that proposals include all information requested and follow the instructions listed in this RFP document.

A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.

B. Approach/Project Work Plan: Describe how the work will be done within the given timeframe and budget. Include a proposed work plan and schedule.

C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

D. Experience: Indicate how your firm meets the experience requirements listed in section IV. of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects, include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles.

E. Cost/Budget: Present the proposed cost of the project and the proposed method of compensation. List hourly rates for personnel assigned to the project, total personnel expenditures, support services, and sub consultant fees (if any). Requested expenses should also be listed. Indicate formula for annual rate increases, if appropriate. This formula shall include factors such as CPI adjustments or other adjustments based on common indices. The formula shall not include additional profit.

F. Diversity in Employment and Contracting:
EWP defines diversity as the variance or difference among people such as race, ethnicity, gender, age, religion, nationality, language preference, socioeconomic status, disability, sexual orientation, gender identity and others. EWP encourages the use of minority-owned businesses, woman-owned businesses, businesses that service disabled veterans own and emerging small businesses, as defined under State law in ORS Chapter 200 and as certified by the Certification Office of Business Inclusion and Diversity (referred to here as COBID Certified Businesses) to the maximum extent practical.

Indicate whether your proposal includes subcontractors. If your proposal does not include subcontractors, complete Section 1 only. If your proposal does include subcontractors, complete both Section 1 and Section 2.
Section 1: To be completed by all proposers

- **Certification:** Is your firm a COBID Certified Business? If yes, indicate the state of certification, all certification types and your firm’s certification number.
- **Demographics:** Describe the diversity in demographics of the proposal team (yourself, your firm and/or any proposed subcontractors). Include race, gender, veteran status and disability. You may also include other measures of diversity, as defined in Section F above. Identify the diverse nature of the people that will perform work in substantive roles and percentage of work on this project.
- **Support:** Describe specific examples of how you and/or your firm support workforce diversity within your firm and/or your local community.

Section 2: To be completed by proposers utilizing subcontractors for this project

- **Subcontractor Information:** Provide the following information for each subcontractor included in this project team:
  - Firm’s name
  - Is the subcontractor a COBID Certified Business? If yes, indicate the state of certification, all certification types and subcontractor’s certification number.
  - Method of choosing identified subcontractor
  - Specific scope of work tasks
  - Percentage of project dollars

- **Projects:** Identify up to three projects worked on during the last 24 months in which COBID Certified Businesses participated. Provide the following information for each project:
  - Project name
  - Project contact’s name, phone number and email address
  - Contract award date, amount and completion date
  - COBID Certified Business goal percentage, if applicable, and COBID Certified Business achievement percentage
  - COBID Certified Business award and expenditure amount

G. **Sustainable Business Practices**

**Environment**
- Describe in general terms how your firm lessens its negative operational impacts on the environment and include details of three activities that demonstrate significant results.
- Describe specifically how your firm will incorporate these environmentally conscious business practices into the delivery of the requested goods and/or services of this project.

**Community**
- Describe how your firm supports its employees by providing living wages and benefits. Describe your employee compensation structure, healthcare and other benefits provided to your employees. Provide documents, when available, that detail wage scales, annual cost of living adjustments (COLA), healthcare program, vacation and sick time, and any other related benefits or incentives.
VIII. **General Proposal/Contract Conditions**

A. **Limitation and Award:** This RFP does not commit EWP to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. EWP reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.

B. **Billing Procedures:** Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of EWP before reimbursement of services can occur. Contractor’s invoices shall include the contract number, and an itemized statement of the work done during the billing period. Payment shall be made by EWP on a Net 30-day basis upon approval of Contractor invoice. Invoices shall be delivered to info@explorewashingtonpark.org.

C. **Validity Period and Authority:** The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with authority to bind any company contacted during the period in which EWP is evaluating the proposal.

D. **Conflict of Interest:** A Proposer filing a proposal thereby certifies that no officer, agent, or employee of EWP or EWP has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of EWP; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.

E. **Equal Employment and Nondiscrimination Clause:** EWP and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. EWP fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities.

IX. **Evaluation of Proposals**

A. **Evaluation Procedure:**

Proposals received that conform to the proposal instructions will be evaluated. The initial evaluation will take place using the evaluation criteria identified in the following section.

EWP may request interviews with the highest ranked proposers prior to final selection of firm(s). Interviews are intended to allow selected proposers to clarify or expand on their proposal and will be worth 25 points.

Award will be made to the highest ranked Proposer according to the evaluation criteria and interview score, if interviews are conducted. If contract negotiations are unsuccessful with the highest ranked firm, EWP reserves the right to enter into negotiations with the next highest ranked Proposer.

B. **Evaluation Criteria:** This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.
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<tr>
<th>Evaluation Criteria</th>
<th>Percentage of Total Score</th>
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<td><strong>Project Work Plan/Approach</strong></td>
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<td>Demonstration of understanding of the project objectives</td>
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<td>Performance methodology</td>
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<td><strong>Project Staffing Experience</strong></td>
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<td>Project consultant/staff experience</td>
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<td>Similar project experience</td>
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<td><strong>Budget/Cost Proposal</strong></td>
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<td>Projected cost/benefit of proposed work plan/strategy</td>
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<td><strong>Diversity in Employment and Contracting</strong></td>
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<td><strong>Sustainable Business Practices</strong></td>
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