

PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into this ____ day of ____, 2022, by and between the **CITY OF MISSOULA, MONTANA**, a municipal corporation organized and existing under the laws of the State of Montana, 435 Ryman St., Missoula, MT 59802, referred to here as “City,” and Metta Urban Design, a Colorado Limited Liability Company, whose principal place of business is located at 191 University Blvd #678, Denver, CO, 80206, hereinafter referred to as “Consultant.”

RECITALS

WHEREAS, the City desires to utilize Consultant to furnish independent services in connection with the City’s Comprehensive Code Reform Project to develop a Unified Development Code (UDC) for the City of Missoula; and

WHEREAS, the City desires to work with Consultant because it has represented to the City that they have access to a professional urban planning team with demonstrated experience in visioning, evaluating, researching, merging, and writing land use regulations of the type the City is looking to incorporate into the proposed UDC; and

WHEREAS, Consultant has represented to the City that Consultant has the necessary expertise to furnish said services and has available to Consultant the necessary staff and resources to perform the independent services in a timely manner consistent with the nature of the project.

NOW THEREFORE, in consideration of the foregoing recitals, which are a material element of the contract, and along with the mutual covenants and agreements herein contained, the parties agree as follows:

1. **Purpose:** City desires to have Consultant create a Unified Development Code (UDC) that achieves the aspirational elements of City policy and fulfills project goals as defined and discussed in the Scope of Work below.

It is the City’s intent that the final UDC will integrate all City development regulations (including but not limited to zoning, subdivision, parks, and engineering regulations) into one code and update the regulations to be responsive to Missoula’s current and emergent land use needs with an emphasis on affordability, equity, and sustainability.

2. **Effective Date:** This Agreement is effective upon the date of its execution by both parties and will terminate upon (1) City’s written approval that the Scope of Work has been completed and it has received the deliverables outlined in the Scope of Work, which is expected to be on December 31, 2024, or (3) upon 30 days’ notice by the City to Consultant of its desire to terminate the Agreement by giving such notice to Consultant’s designated liaison identified below; whichever of the two outcomes shall occur first.

3. **Scope of Work:**

a. Consultant will perform the work and provide the services in accordance with the requirements of the following documents, which are hereby incorporated into this Agreement:

- i.** The City of Missoula Comprehensive Code Reform RFP Dated, December 12, 2021,
- ii.** The Metta Urban Design Response to RFP for the City of Missoula, dated January 20, 2022; and
- iii.** The Missoula Comprehensive Code Reform - Scope of Work, dated April 26, 2022, attached here to as Exhibit A.

In the event of a conflict between the provisions in any of the documents identified above, the Scope of Work shall control, with the Metta Urban Design Response controlling in precedence over the City of Missoula Comprehensive Code Reform RFP.

b. If authorized in writing as provided in this subsection, Consultant shall also furnish additional services. To the extent additional services have been identified at the time of executing this Agreement, they are itemized in Exhibit A and will be paid for by City as indicated in Section 4. As further additional services are requested of Consultant that are not outlined in Exhibit A, this Agreement may be modified and subject to mutual consent by execution of an addendum by authorized representatives of both parties, setting forth the additional scope of services, their performance time schedule, and the compensation for such services.

4. Payment:

a. City agrees to pay Consultant for services outlined in Exhibit A in accordance with the terms and conditions laid out in Exhibit B – Compensation, and Consultant shall be compensated for additional services authorized pursuant to Section 3.b. above, which have not been identified at the time of executing this Agreement as more particularly described in a fully approved and executed addendum to this Agreement. Payment for work beyond that described in Exhibit A or as contained in a fully approved and executed addendum to this Agreement is expressly denied without prior written authorization from City. Such authorization must include signature of the Mayor.

b. Consultant shall submit monthly statements for basic and additional services rendered. City shall pay Consultant within 30 days of receipt of an itemized invoice for the services rendered or shall notify Consultant of any dispute by City concerning the performance of any services and the basis therefore and shall pay Consultant within thirty days for the services not in dispute. If any items are disputed by City, Consultant and representatives of City shall meet and confer regarding the disputed items within ten business days after City notifies Consultant of the services in dispute. City shall pay for any disputed services for which the dispute has been resolved to the satisfaction of the City within thirty days after such resolution.

5. Independent Consultant Status: The parties agree that Consultant, is an independent consultant for purposes of this agreement and the parties agree that Consultant is and shall be an independent consultant when performing services pursuant to this agreement. Consultant is not subject to the terms and provisions of the City's personnel policies handbook and may not be considered a City employee for workers' compensation or any other purpose. Consultant is not authorized to represent the City or otherwise bind the City in any dealings between Consultant and any third parties.

Consultant shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Consultant shall maintain workers' compensation coverage for all members and employees of Consultant's business, except for those members who are exempted by law.

Consultant shall furnish the City with copies showing one of the following: (1) a binder for workers' compensation coverage by an insurer licensed and authorized to provide workers' compensation insurance in the State of Montana; or (2) proof of exemption from workers' compensation granted by law for independent consultants.

6. Indemnity and Insurance: For other than professional services rendered, to the fullest extent permitted by law, Consultant agrees to defend, indemnify, and hold the City harmless against claims, demands, suits, damages, losses, and expenses connected therewith that may be asserted or claimed against, recovered from or suffered by the City by reason of any injury or loss, including but not limited to, personal injury, including bodily injury or death, property damage, occasioned by, growing out of, or in any way arising or resulting from any intentional or negligent act on the part of Consultant or Consultant's agents or employees.

For the professional services rendered, to the fullest extent permitted by law, Consultant agrees to indemnify and hold the City harmless against claims, demands, suits, damages, losses, and expenses, including reasonable defense attorney fees, to the extent caused by the negligence or willful misconduct of the Consultant or Consultant's agents or employees.

For this purpose, Consultant shall provide City with proof of Consultant's liability insurance issued by a reliable company or companies for personal injury and property damage in amounts not less than as follows:

- Workers' Compensation—statutory
- Commercial General Liability—\$1,000,000 per occurrence; \$2,000,000 annual aggregate
- Automobile Liability—For any rental cars used during trips to Missoula that are part of this project, Consultant must purchase or otherwise obtain comprehensive liability, collision, and bodily injury coverage provided by the rental car agency
- Professional Errors and Omissions Liability—\$1,000,000 per claim; \$2,000,000 annual aggregate

The City shall be included or named as an additional or named insured on the Commercial General and Automobile Liability policies. The insurance must be in a form suitable to City.

7. Professional Service: Consultant agrees that all services and work performed under this agreement will be accomplished in a professional manner, in accordance with the accepted standards of Consultant's profession.

8. Compliance with Laws: Consultant agrees to comply with all federal, state and local laws, ordinances, rules and regulations.

9. Nondiscrimination and Affirmative Action: Consultant agrees and shall comply with the following Non-Discrimination and Affirmative Action policies:

NON-DISCRIMINATION. All hiring shall be on the basis of merit and qualification and there shall be no discrimination in employment on the basis of race, ancestry, color, physical or mental disability, religion, national origin, sex, age, marital or familial status, creed, ex-offender status, physical condition, political belief, public assistance status, sexual orientation, or gender identity/expression, except where these criteria are reasonable bona fide occupational qualifications.

AFFIRMATIVE ACTION POLICY. Consultants, sub-consultants, sub grantees, and other firms doing business with the City of Missoula must be in compliance with the City of Missoula's Affirmative Action Plan, and Title 49 Montana Codes Annotated, entitled "Human Rights" or forfeit the right to continue such business dealings.

The City's Affirmative Action Policy Statement is:

The Mayor of the City of Missoula or the Mayor's designee may adopt an affirmative action plan to provide all persons equal opportunity for employment without regard to race, ancestry, color, handicap, religion, creed, national origin, sex, age, sexual orientation, gender identity or expression, or marital status. In keeping with this commitment, we are assigning to all department heads and their staff the responsibility to actively facilitate equal employment opportunity for all present employees, applicants, and trainees. This responsibility shall include assurance that employment decisions are based on furthering the principle of equal employment opportunity by imposing only valid requirements for employment and assuring that all human resource actions are administered on the basis of job necessity.

Specific responsibility for developing, implementing, monitoring and reporting are assigned to the City Personnel staff under the supervision and direction of the Chief Administrative Officer and the Mayor.

It is the policy of the City of Missoula to eliminate any practice or procedure that discriminates illegally or has an adverse impact on an "affected" class. Equal opportunity shall be provided for all City employees during their terms of employment. All applicants for City employment shall be employed on the basis of their qualifications and abilities.

The City of Missoula, where practical, shall utilize minority owned enterprises and shall ensure that sub-consultants and vendors comply with this policy. Failure of sub-consultants and vendors to comply with this policy statement shall jeopardize initial, continued, or renewed funds.

Our commitment is intended to promote equal opportunity in all employment practices and provide a positive program of affirmative action for the City of Missoula, its employees, program participants, trainees and applicants.

10. Default and Termination: If either party fails to comply with any condition of this agreement at the time or in the manner provided for, the other party, at its option, may terminate this agreement and be released from all obligations if the default is not cured within ten (10) days after written notice is provided to the defaulting party. Said notice shall set forth the items to be cured. Additionally, the non-defaulting party may bring suit for damages, specific performance, and any other remedy provided by law. These remedies are cumulative and not exclusive. Use of one remedy does not preclude use of the others. Notices shall be provided in writing and hand-delivered or mailed to the parties at the addresses set forth in the first paragraph of this agreement.

11. Modification and Assignability: This document contains the entire agreement between the parties and no statements, promises or inducements made by either party or agents of either party, which are not contained in this written agreement, may be considered valid or binding. This agreement may not be enlarged, modified or altered except by written amendment signed by both parties hereto. The Consultant may not subcontract or assign Consultant's rights, including the right to compensation or duties arising under this agreement, without the prior written consent of City. Any sub-consultant or assignee will be bound by all of the terms and conditions of this agreement.

12. Ownership and Publication of Materials: All reports, information, data, and other materials prepared by the Consultant pursuant to this agreement are the property of the City. The City has the exclusive and unrestricted authority to release, publish or otherwise use, in whole or part, information relating thereto. Any re-use without written verification or adaptation by the Consultant for the specific purpose intended will be at the City's sole risk and without liability or legal exposure to the Consultant. No material produced in whole or in part under this agreement may be copyrighted or patented in the United States or in any other country without the prior written approval of the City.

13. Liaison: designated liaison with Consultant is Samantha Suter, and Consultant's designated liaison with City is Ben Brewer.

14. Previous Agreements: This Agreement constitutes the entire understanding of the parties and is intended as a final expression of their agreement and a complete statement of the terms thereof. There are no promises, terms, conditions, or obligations, other than contained herein. This Agreement shall supersede all previous communications, representations, or agreements, either oral or written, between the parties.

15. Applicability: This agreement and any extensions of it shall be governed and construed in accordance with the laws of the State of Montana.

WITNESS, the parties here have executed this instrument the day and year first above written.

CONSULTANT:

MAYOR
City of Missoula, Montana

John Engen

ATTEST:

APPROVED AS TO FORM:

Martha L. Rehbein, CMC, City Clerk

Jim Nugent, City Attorney

(SEAL)

CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

through

DEVELOPMENT OF A UNIFIED DEVELOPMENT CODE

Consultant Contract

Exhibit A: Scope of Work

Missoula Comprehensive Code Reform - Scope of Work

Task 1: Project Start-Up

1.1 Final Scope of Work and Schedule. The Metta Urban Design team (Consultant) will work with City staff to finalize the project scope, schedule (including expected trips), and deliverables. These documents may be updated throughout the project, as needed.

1.2 Background Document Review. Consultant will work with City staff to determine what documents are most relevant to the project and will review the documents to become familiar with applicable City plans and policies. Documents will include:

1. Our Missoula Growth Policy: 2035 (2015)
2. City of Missoula Zero Waste Plan (2018)
3. Parks, Recreation, Open Space, and Trails Plan (2019)
4. A Place to Call Home: Meeting Missoula's Housing Needs (2019)
5. City Annexation Policy (2019)
6. 2019 Missoula Downtown Master Plan (2019)
7. City of Missoula Strategic Plan: 2020-2023 (2020)
8. Sx wtpqyen (S-wh-tip-KAYN) Neighborhoods Master Plan (2020)
9. Missoula Subdivision and TED Regulations Report (2020)
10. Climate Ready Missoula Plan (2020)
11. Justice, Equity, Diversity, and Inclusion (JEDI) Resolution (2021)
12. Missoula Connect: 2050 Missoula Long Range Transportation Plan (2021)
13. Mountain Line Strategic Plan (2018)

Consultant will also review materials related to ongoing efforts, such as the Transportation Options Action Plan, the Missoula Affordable Housing Incentives Analysis, the Midtown Master Plan, and edits to Title 12.

1.3 Community Engagement Plan. Consultant will develop an **Engagement Plan** with input from the City's Community Engagement Specialist. This will include an Engagement Team Kickoff meeting to discuss components of the plan and past successful engagement and brainstorm strategies to use during the project. The discussion will also identify immediate deliverables needed, initial messaging for staff to use at different meetings, project branding ideas and considerations, and approach to the project website. The goal will be to get these elements launched as soon as possible.

The primary objective is to ensure meaningful, equitable engagement throughout the project. The **Community Engagement Plan** will include the following elements:

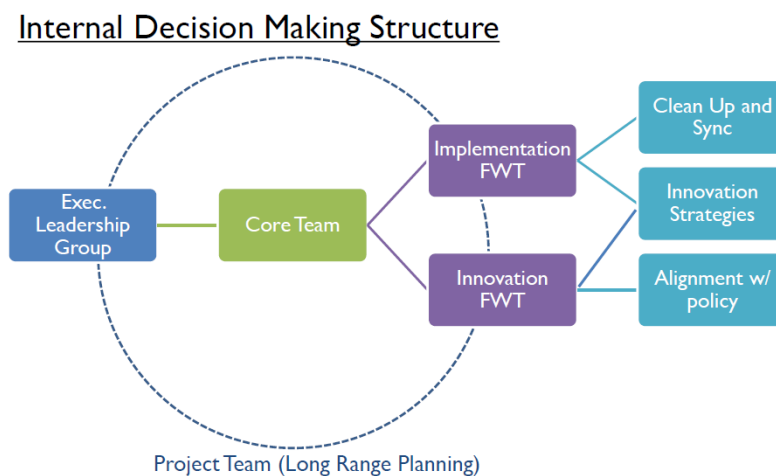
1. **Schedule and milestones** - Community engagement events will be coordinated with key points in the project so that feedback received effectively informs the project work. Consultant will work closely with City staff to determine the specific activities and timeline to add the most value to the project. The Engagement Plan will include seven cycles of engagement spread across Task 2 through Task 5. Consultant will maintain an updated project schedule and publish this information to the project website.

2. **Target audiences** - Consultant will work with City staff to identify audiences to reach and specific engagement activities to reach each audience at the relevant project milestone. Target audiences will include the following:
 - a. **Community** - wide range of participants. Engagement includes virtual and in person workshops, surveys, media campaigns, and info sessions, and are often meant to spread broad community awareness and understanding of the project and to gauge the pulse of the community at large.
 - b. **City staff** - including the Project Manager, the City Engagement Specialist, Executive Leadership Team, City Core Group, Implementation Functional Work Team, Innovation Functional Work Team, and Engagement and Communication Team.
 - c. **Boards and Decision-Making Bodies** - City Council, Planning Board, and potentially the Design Review Board, Board of Adjustment and Historic Preservation Commission.
 - d. **Frequent Code Users** - developers, architects, housing advocates, real estate professionals, etc. who are familiar with the code and have gone through the review process.
 - e. **Strategic partners** - Community-based outreach partners.
3. **Community Leaders** - Working closely with City staff, the consultant will identify, recruit, and organize the work of 8-15 community leaders that will act as liaisons for the project. Community leaders will be organized under a charter, meet regularly throughout the process with the project team, and directly implement and promote engagement activities. Consultant will compensate the community leaders with a stipend for their time as described in the project budget.
4. **Project branding and Communications** - Consultant will work closely with City staff to design a project brand that will be relevant and compelling for the Missoula community, and apply this brand to project deliverables, templates, the project website, and any other public facing material. Project templates will be used by all team members to ensure a cohesive, unified project brand throughout the project duration.
5. **Key messages** - Consultant will prepare nuanced messaging and techniques catered to each group that address the “who, what, where, and why” of the project and a call-to-action. Important considerations for key messaging include a clear narrative that is tailored to be relevant to the audience/community and intentionally choosing terminology that is culturally relevant and avoids jargon, metaphor, or euphemisms that might not be easily understood, especially when translated into languages other than English.
6. **Project Website** - Consultant will build a Bang the Table project website, and integrate this into the existing Engage Missoula website, using the “hub” model as part of the City’s Bang the Table subscription. Project webpage will include a landing page with upcoming events, frequently asked questions page, document library including project deliverables, past presentations, and video library, with any recorded meetings. Bang the Table’s engagement tools will also be used, including the ideas board, quick polls, surveys, and mapping exercises, to get community feedback at key points of the project. Detailed strategy and timing of the online engagement will be finalized during the engagement plan.
7. **Tools, Techniques and Platforms** - Consultant will work with City staff and local community leaders to identify the best tools and techniques for engagement ranging from large scale community workshops, focus groups, online surveys and activities, informational material, public notifications, and other innovative engagement strategies developed by the team. A variety of communication channels will be used (ie. project website, social media, radio, e-newsletter, etc.) to regularly inform the public about project updates.

Expectations of City Staff: Staff will be responsible for meeting expenses including food, childcare, venue fees, translation, interpretation, and audio-visual needs, unless otherwise noted in the scope.

1.4 Project Management Plan. An initial Kick-off Meeting between Consultant and City staff will be held to establish a Project Governance Structure that outlines roles and responsibilities, team operating principles and decision-making processes, meeting frequency, project milestones, schedule, document communication protocol, primary points of contact, and file sharing methods. A master contact list describing the roles of all project team members will be prepared.

The Project Management Plan is based on the following City staff team organization and meeting frequency:



- **Project Managers** - weekly check-ins between the City and the consultant team Project Managers, may be via email, phone, or video conference
- **Core Team** - biweekly meeting throughout the project, may increase or decrease based on the project schedule, amount of production, and review periods
- **Engagement and Communications Team** - meet biweekly (to start), then reduce to monthly or as needed to prepare for engagement cycles
- **Executive Team** - meet at key decision points and at least one time per task
- **Innovation Functional Work Team** - meetings to be determined.
- **Implementation Functional Work Team** - meetings to be determined.

Key milestones will be identified for engaging with each team in the Project Management Plan.

Expectations of City Staff: Staff will be responsible for internal City communication and scheduling City meetings.

Communication Structure and Capacity Opportunities



Deliverables:

- *Project schedule, with task deadlines and major milestones.*
- *Final scope of work.*
- *Final Community Engagement Plan.*
- *Project Management Plan*

City Deliverables:

- *Background documents, codes, manuals, and other city policies relevant to the project*
- *GIS data*
- *Review and comments of Engagement Plan and Project Management Plan*
- *List of key stakeholders and community groups to engage throughout the project, including potential Community Leaders*

Meetings:

- *Initial On-Site Introductory Visit to Missoula (Trip #1 of 8: duration TBD)*
- *Kick-Off Meeting*
- *Ongoing team meetings*

Task 2: Unified Development Code Framework

2.1 Engagement Cycle #1 – Project Kickoff & Listening Sessions. The first engagement cycle will serve to kick off the internal and external engagement and communications for the Comprehensive Code Reform project. This may include the initial launch of the project website, establishing the project brand, and clear messaging that distinguishes Task 2 work from the Growth Policy Update (led by the City and assisted by Consultant) that will have its own engagement activities. This cycle will also include Listening Sessions with small groups of stakeholders, community leaders, and frequent code users. Exact details will be further refined in the Engagement Plan. The Listening Sessions are expected to include the following groups.

- City staff across departments, including the Implementation and Innovation Functional Work Groups and the Leadership Group
- Interviews or small group discussions with frequent code users, such as architects, engineers, housing advocates, and real estate professionals; this will include the Top 10 collectives or individuals that we want to stay involved throughout the project.
- City Council and Planning Board Members

Expectations of City Staff: *Staff will be responsible for inviting participants and scheduling the Listening Sessions. Staff will be available to coordinate on any licensing or admin issues related to Engage Missoula to ensure seamless web integration with the UDC Project Website.*

2.2 Code Organization and Process Audit.

Consultant review will focus primarily on:

1. Title 20: Zoning Code
2. Title 12: Streets, Sidewalks, and Public Places
3. Title 21: Sxwtpqyen Form Based Code
4. Other Titles (sections thereof)
 - a) Title 5: Licensing
 - b) Title 13: Public Services
 - c) Title 15: Buildings and Construction
 - d) Title 16: Manufactured Housing and Mobile Home Parks
 - e) Title 18: Floodplain
5. City of Missoula Subdivision Regulations
6. Planned Unit Developments, Special Districts, and associated Title 19
7. The Public Works Standards and Specifications Manual
8. The Missoula Parks and Recreation Design Manual
9. Design Excellence Overlay Design Manual

Additional sections and titles may be identified and included in the review, including specific applications, the City website, and user guides. Consultant will work with staff to identify which parts of the code are most relevant to audit. The work will build on previous efforts, including the *Subdivision and TED Recommendations Report*, and will analyze the code based on the following topics.

2.2.1 Code Organization:

1. Overall organization, hierarchy, and ease of navigation of existing development regulations (code, administrative rules, manuals, etc.)
2. Clarity and consistency of terms, definitions, and rules of measurement
3. Use of plain and accessible language
4. Effective and consistent use of graphics and illustrations
5. Errors, conflicts and contradictions between regulations.
6. Legal consistency with state regulations.

2.2.2 Development Review Processes:

1. Clarity of review processes and consistency of customer experience for projects of similar scope
2. Level of review commensurate with approval actions (*i.e. how do inadequate and/or inconsistent standards create additional processes; role of boards, commissions, City Council*)
3. Most common conditions of approval for appeal and variance requests
4. Mapping of concurrent and sequential review processes
5. Relationship between review processes and housing affordability and equity

Expectations of City Staff: *Staff will provide all codes, standards, and manuals to review, including digital copies of any material that is not available online, and will provide documentation of the current review process, including list of review types, specific criteria or standards for each type, decision maker,*

length of time to review, and other details. Staff will also provide recent permit data, including the project type and location, and any other relevant information that is readily available relating to recent development.

2.3 Adopted Policy Alignment Audit. Consultant will conduct a community vision check-in, using current City policies as a foundation and will analyze the degree of alignment between the current code (documents listed in Subtask 2.2) and adopted plans and policies (documents listed in Subtask 1.2). Work in this Subtask will be coordinated with Task 4, as the ongoing effort to update the Growth Policy may inform what city policies remain and what policies are updated or added. The policy alignment analysis will include a thorough review of the code and identify:

1. How the code promotes development consistent with current adopted City policies by right
2. How the code allows development consistent with current adopted City policies but requires significant review processes
3. How the code prohibits development consistent with current adopted City policies

2.4 Code Update Action Plan and Work Sessions. Consultant will identify potential changes to existing development regulations based on findings in the audits and listening sessions described in Tasks 2.1-2.3. Consultant will prepare a Code Update Action Plan that includes recommended approaches for creating a Unified Development Code (UDC). The Action Plan will be organized in two phases of work. Phase 1 work will prioritize consolidation of multiple development regulations into a Unified Development Code Framework (UDC Framework) to remove conflicts and redundancies and provide more predictable development review processes. Revisions in this phase are expected to be policy-neutral and will:

1. be clearly supported by adopted policies in existing plans and adopted policies in completed dovetailing projects (described in Appendix C of the RFP)
2. have minimal negative impacts that need to be considered or mitigated,
3. have substantial benefits that are worth implementing them immediately, and
4. not be contingent on other changes that will be considered in Phase 2.

Phase 2 work will comprise Task 5: Unified Development Code and will result in a comprehensive code reform. All substantive code changes will be informed by Task 3 and Task 4 and incorporated into the UDC Framework established in Phase 1.

Consultant will facilitate up to 2 work sessions with staff to discuss the code Update Action Plan and determine the scope of work to be executed in Phase 1 and Phase 2 and the extent of proposed changes to be adopted in Task 2: Unified Development Code Framework.

Expectations of City Staff: *Staff will lead internal meetings to resolve any differences between departments, and at least one of the work sessions will be with the Executive Team to ensure support for the approach from City Leadership.*

2.5: Annotated Outline of UDC Framework. Consultant will produce an annotated outline for the UDC Framework based on direction from the Executive Team regarding the Code Update Action Plan.

2.6 Phase 1 UDC Framework and User Guides - Admin Draft. Consultant will provide a UDC Framework, which will include targeted code revisions, consistent with the criteria in Subtask 2.4, that will focus on clarity, streamlining, and improved user experience. The exact details of the UDC Framework

will be based on the Listening Sessions (Subtask 2.1), informed by the Audits (Subtasks 2.2 and 2.3), verified and refined with staff (Subtask 2.4), and described in an annotated outline (Subtask 2.5).

Consultant will create companion documents along with the Phase 1 Code Amendments that document and clarify the existing process through flowcharts, toolkits, and checklists. The goal of this task will be to provide tools to aid both staff and the development community in understanding the review process and how to navigate through efficiently and effectively. While these guides may not require adoption, they will be a useful tool in addressing the City's goal of streamlining the review process.

Consultant will incorporate up to two rounds of substantive revisions as part of the Admin Draft.

2.7 Phase 1 UDC Framework and User Guides - Public Review and Adoption Draft. Consultant will create a Public Review Draft and a final Adoption Draft of the UDC Framework and User Guides, per comments received during the adoption process.

2.8 Engagement Cycle #2 - Adoption of UDC Framework. Consultant will help City staff prepare for, and will participate in, up to two Public Hearings or Work Sessions with either Planning Board and/or City Council on the UDC Framework, as part of the adoption process. Staff will lead any additional meetings required to get the UDC Framework through adoption.

As part of this cycle, the community at large will be updated on proposed changes and informed about the adoption process, including the major milestones for community input and the relationship between the UDC and the Growth Policy Update. This cycle will rely primarily on digital engagement, social media message boards, communication blasts, and press releases. The goal will be to balance informing the community about the project and clearly explaining what is included in the UDC Framework and how substantive changes to the development regulations will occur after and in alignment with the Growth Policy Updates in Task 4.

Expectations of City Staff: Staff will lead the adoption of the UDC Framework, with support from the consultant team as described above.

Consultant Deliverables:

- *Process and Organization Audit*
- *Policy Alignment Audit*
- *Code Update Action Plan*
- *Annotated Outline of UDC*
- *Phase 1 UDC Framework*
- *Phase 1 User Guides*
- *Engagement Cycle #2 Outreach Materials*

City Deliverables:

- *Comments on Task 2 Deliverables*

Meetings:

- *Stakeholder Interviews and Small Group Discussions with Frequent Code Users*
- *Process Audit Work Session with Staff*
- *Policy Audit Work Session with Staff*
- *Code Update Action Plan Work Sessions with Staff (up to 2)*

Task 3: Community Innovation Audit

3.1 Equity in Land Use Evaluation. A central goal of the code reform project is to advance equitable development outcomes in the city. Consultant will produce an Equity in Land Use Evaluation that identifies standards, procedures, and mapping decisions that may perpetuate inequitable development. This evaluation will help the City to understand how land use policies perpetuate inequity and to target code changes strategically in order to most effectively support equitable development outcomes.

Approach Memo

Prior to conducting the evaluation, the consultant will prepare a brief memo that provides a detailed approach to the evaluation. The memo will describe the data sources and proposed methodology for each element of the evaluation, including assumptions, inputs, geographic scope, and indicators. City staff will review the memo and provide feedback on the proposed approach. If deemed necessary, the memo will be shared with other local stakeholders or community leaders for input. Consultant will revise the memo to respond to feedback.

The Equity in Land Use Evaluation is anticipated to address five elements of equity, which are summarized below:

- Historical Inequities
- Existing Code Standards
- Inclusion and Affordability
- Access to Opportunity
- Displacement and Gentrification Risk

Summary of Historical Inequities

To appropriately recognize the historical context within which the current code operates, the consultant will prepare a summary of historical practices of inequity that have impacted and continue to impact the community. The summary will draw on local, state, and national documentation of historical actions that have contributed to current inequities. The scope of the summary will extend from the initial settlement of the town and the associated displacement of indigenous peoples through to the modern development of Missoula in the 20th century and in recent decades. The summary is not intended to be comprehensive and will not document every inequitable land use or development practices that has occurred over this timeframe. Rather, the intent of the summary is to document key practices that are pertinent to understanding current inequities in the community.

Existing Code Standards Assessment

Concurrent with the Policy Alignment Audit (Task 2.2), the consultant will review all relevant code regulations and identify provisions that may perpetuate inequitable outcomes or present barriers to more equitable development. Inequity will be conceived broadly and consider potential impacts on a wide range of populations, including people of color, indigenous people, lower income households, people experiencing homelessness, people with disabilities, elderly people, students, and other groups. Key findings will be summarized and evaluate how the code as a whole may be either supporting equity or contributing to inequity.

Housing Affordability and Inclusion Analysis

In order to precisely diagnose how the code impacts equity in housing, the consultant will conduct a quantitative and spatial analysis of the city's housing-related regulations. The analysis will evaluate the affordability of new housing that is allowed and economically feasible to build under existing code standards in each applicable zone district. The analysis will use housing prototypes and real estate pro formas to construct models of housing developments that are likely to be built. The analysis will be based on local market conditions and calibrated to existing code standards, including allowed uses/housing types/densities, lot dimensions, setbacks, height, floor area ratio, landscaping and activity area requirements, parking and bike parking requirements, multi-dwelling standards, and other standards.

The outputs of the analysis will include the minimum rent or sale price needed for a housing project to be economically feasible, relative affordability given local income levels, and other measures of affordability and inclusion. This analysis would be coordinated with any economic analysis conducted for the Missoula Affordable Housing Incentives Analysis.

Access to Opportunity Analysis

In order to provide more context for the affordability and inclusion evaluation, the consultant will evaluate how the code and zoning map affects the ability for households to live in neighborhoods with greater access to opportunities and assets, such as transportation infrastructure, parks and nature, cultural amenities, and employment opportunities.

This analysis may incorporate data compiled as part of the Missoula Assets Mapping project completed in 2014. We will break down the asset scores by zone district or subarea. Paired with the measures of affordability and inclusion, this analysis will help to identify areas with high access to opportunity that are relatively exclusive and could benefit from code changes to allow a wider range of people to live in these areas. The analysis may also identify areas with relatively low access to opportunity in order to assess how code changes could improve access to opportunity.

Displacement and Gentrification Risk Evaluation

Code changes can both support more affordable housing options and potentially accelerate market trends that are making it difficult for people to stay in their neighborhoods. The consultant will use a data-driven methodology for evaluating vulnerability to displacement and stages of gentrification by census tract. The key outcome of this analysis is a Neighborhood Gentrification Typology. The typology highlights areas that are experiencing different stages of gentrification based on vulnerability to displacement, demographic change, and housing market conditions. We will evaluate implications of the Neighborhood Gentrification Typology as it pertains to both existing zoning standards and potential future code and map changes.

Summary Report

These analyses will be summarized in a single Equity in Land Use Evaluation report. The document will include a summary of findings and recommendations for advancing equity through the code reform project. The summary will be concise and visually engaging in order to ensure it is accessible for a broad audience.

3.2 Community Form Analysis. Consultant will document and analyze the existing built patterns

throughout the City and explain “why” the city looks the way it does. Connecting built form to city history builds a powerful narrative and helps people to understand the potential impact they can have in updating the city code.

Approach Memo

Prior to conducting the evaluation, the consultant will prepare a brief memo that documents the proposed approach to the evaluation in more detail than this scope of work.

Community Form Analysis

As part of this analysis, the consultant team will examine neighborhood development patterns shaped by different eras of land use policies and transportation priorities. This will include, but not be limited to analysis of:

1. Street, alley, and block patterns and their dimensional characteristics, and degree of connectivity.
5. Influence of streetcars and trolleys, rail lines, rivers and arterials/highways on neighborhood form and character
6. Sidewalk and street tree patterns
7. Land parcel patterns and their dimensional characteristics
8. Dimensional characteristics of existing buildings, how they relate to land parcels, Rights-of-way, and surrounding buildings (*e.g. setbacks, lot coverage, height, massing and articulation, ground story activation, building elements, and access*) and how well current regulations shape compatible infill.
9. Year/era of Construction and annexation
10. Character, identity, and historic qualities

Results will be collected and presented including photo inventories, models of “typical” development patterns, lot size analysis, maps, setback analysis, street network, and other data that is readily available. The analysis will be summarized in the Community Innovations Audit Report.

3.3 Engagement Cycle #3 - Community Form and Equity Analysis. Engagement Cycle #3 will build upon the project kick off activities conducted during Engagement Cycle #1 in Task 2 and coordinated with the staff led Growth Policy Update engagement activities. Consultant will prepare materials that explain the Community Form and Equity Analysis in concise and visually engaging ways to ensure findings are accessible for a broad audience. This engagement cycle will also provide the opportunity for the community members to provide input based on their lived experiences.

3.4 Scenario Modeling of Innovation Strategies. Building on the findings of previous tasks, the consultant will lead a scenario modeling process that will help the city understand the potential impacts of implementing various innovation strategies through the code reform.

Approach Memo

Prior to conducting the modeling, the consultant will document our proposed methodology in a brief memo. This will allow us to design a process that best aligns with the needs of the project and ensures the analysis will most effectively support key decisions. The memo will address the structure of the scenarios, identify preliminary scenario inputs, and define the indicators to be used to evaluate each scenario. City staff will review the memo and provide feedback on the proposed approach. Consultant will revise the memo to respond to staff feedback.

Scenario Modeling

Based on the methodology identified in the approach memo, the consultant will conduct the scenario modeling process. The scenario models will assess the impact of code and policy changes on a range of indicators, including but not limited to:

- Maximum buildout capacity in terms of housing units and commercial/industrial floor area.
- Building, water, and transportation greenhouse gas emissions
- Vehicle miles traveled
- City Mode Split Goals
- Transit ridership
- Energy and water use
- Land consumption
- Housing unit density
- Walkability

Consultant will model one (1) baseline scenario and up to three (3) alternative scenarios and produce a draft and final version of each model. The scenarios may be organized around individual code reforms or they may be organized into alternative packages of code reforms. The results of the modeling will be presented in maps and data visualizations that are engaging and easy to understand for the public.

3.5 Community Innovations Audit Report. Consultant will combine the results from the Community Form Analysis and the Scenario Modeling into a concise, user friendly **Community Innovations Audit Report**. This report will rely heavily on graphics and visualizations in order to create a more engaging, accessible document, and we will integrate key findings into the project website for widespread dissemination of the material.

Part of this report will be a set of visually engaging scenario “report cards” that paint a vivid picture of potential impacts and benefits of code reforms to share with the community, policymakers, and other stakeholders. Participants are given a more complete picture of the outcomes associated with each alternative scenario and are given an opportunity to weigh in on the elements of each that they like and dislike. This input can be used to craft more refined code changes as well as modifications to the Growth Policy and Future Land Use Map.

3.6 Engagement Cycle #4 - Innovations Report. Consultant will share the Community Innovations Audit Report throughout the community, and we will meet with a variety of audiences to review and discuss the report. As part of this task, we expect the following events.

- Staff Work Session
- Executive Leadership Team Meeting
- Synchronous Community Workshop/s
- Asynchronous Virtual Meeting / Survey
- City Council and/or Planning Board Work Session

Consultant will plan a “synchronous” and broad Community Workshop as part of this Engagement Cycle, and it can be either in person or virtually, depending on current public health best practices. This will give us an opportunity to hear directly from the community about the innovations and strategies they want integrated into their code. We will also include an “online equivalent” with a recording of the presentation and a way to collect public feedback during a time that is convenient for the user.

3.7 Framework for Next Steps Memo. Task 3 culminates with a Framework for Next Steps Memo that summarizes our technical findings, the community response and direction, and our recommended next steps. Consultant will share this memo with City staff and revise according to your feedback prior to moving forward with Tasks 4-6

Deliverables

- *Approach Memo for Equity in Land Use Evaluation*
- *Equity in Land Use Evaluation Report*
- *Approach Memo for the Community Form Analysis*
- *Approach Memo for Scenario Modeling of Innovation Strategies*
- *Community Innovations Audit Report including Community Form Analysis and Scenario Modeling of Innovation Strategies*
- *Framework for Next Steps Memo*

Meetings

- *Equity in Land Use Work Sessions with Staff (up to 2)*
- *Community Form Work Sessions with Staff (up to 2)*
- *Scenario Modeling Work Sessions with Staff (up to 3)*
- *Framework review with Planning Board and City Council (2 sessions)*

Task 4: Growth Policy Update

4.1 Growth Policy and Future Land Use Map: Discussion Draft. Consultant will coordinate with City staff as Growth Policy Updates are finalized with a focus on the relationship between the code and the draft policy and map. This task will be informed by the modeling and analysis work done in Task 3, and exact roles and responsibilities of how these efforts are aligned will be discussed and refined through close coordination with City staff, especially as they relate to the findings Task 2.3.

4.2 Growth Policy and Future Land Use Map: Public Review Draft. Consultant will coordinate with City staff on the update and refinement of the Draft Growth Policy and Future Land Use Map and their implications on code updates and potential zoning map changes.

4.3 Engagement Cycle #5 - Growth Policy & Future Land Use Map. This Engagement Cycle will begin to connect the analysis and modeling from Task 3 with the draft Growth Policy and Future Land Use Map. This will include work sessions with City staff and focus groups, and a robust online engagement to help the community understand and finalize the Public Review Draft. This Engagement Cycle will focus on the Confirmation of Priority Policies for the code rewrite and approach. For an effort of this potential magnitude, it's important to build a strong collective understanding of policy priorities with City leadership to further articulate, prioritize, document, and communicate the adopted policies that provide the foundation for the code update effort. This step is critical, as it establishes community expectations early in the process and provides a rubric for decision makers to reference when considering draft code changes in Task 5.

4.4 Adopted Growth Policy and Future Land Use Map. Consultant will support City staff in finalizing the Adopted Growth Policy and Future Land Use Map, as informed by community engagement.

Deliverables:

- Support Staff with the Adopted Growth Policy Update
- Support Staff with the Adopted Future land use map update

Expectations of City Staff for Task 4: City staff will lead the Growth Policy Update and the Consultant will support City staff in work related to development regulations.

Task 5: Unified Development Code

5.1 UDC and Zoning Map: Discussion Draft. Consultant will expand the UDC Framework into a complete, comprehensive **Unified Development Code**, based on the recommendations from 2.4.2 and the Framework for Next Steps and to align with the Priority Policies, based on the Growth Policy and Future Land Use Map Updates, and other still relevant policies (identified in Task 2). The updated code will include illustrations and graphics, user friendly page layouts, streamlined navigation, and other best practices. The update may or may not include an updated Zoning Map, which will be described in Tasks 3 and 4 and through close coordination with City staff and confirmed in this task.

In developing the draft, the consultant will create an initial outline of the new code prior to drafting. This will be based on the Annotated Outline (Subtask 2.5) and updated based on the Framework for Next Steps Memo (Subtask 3.7). We will also create a summary of changes matrix that documents the changes to the new Code. All proposed code changes will be presented based on their alignment to the Growth Policy Updates and other priority policies that will be codified in either the Policy Alignment Audit (Subtask 2.3) and the Growth Policy Update (Task 4).

5.2 Guiding Documents: Discussion Draft. Consultant will create updated Guiding Documents, such as revised applications, process graphics, workflows, and checklists, to aid in usability of the code. Exact deliverables will be determined with staff, however the intention is to reduce the overall dependency on guides by improving the user experience of the code itself.

5.3 Engagement Cycle #6 - Draft UDC and Zoning Map Concepts. This Engagement Cycle will include widespread outreach to target audiences including staff, (both planning and other city departments), frequent code users, Boards and Commissions, and the community at large. This may include a “community testing” process where local architects and designers use the draft code to test feasibility and usability of the draft code – this step is valuable in evaluating the new code and one that can build confidence and project champions. Information will be shared on the website encouraging the community to review the draft code and understand the benefits of the proposed changes. This will include information sheets that provide succinct and clear explanations of high level themes to increase overall awareness and understanding of the code.

5.4 UDC and Zoning Map: Public Review Draft. Consultant will update the draft UDC and Zoning Map, per input and feedback we receive during engagement. Changes will be tracked in the **Summary of Changes Matrix** to clarify and explain the changes from the Discussion Draft.

5.5 Guiding Documents: Public Review Draft. Consultant will revise and update the Guiding Documents based on input and feedback received during engagement. This will also include creating additional guides if necessary.

5.6 Engagement Cycle #7 - Public Review. Consultant will conduct another round of engagement depending on what topics or groups need further review and discussion. This will provide opportunity to adjust engagement based on community input, and the exact audience, topic, and method of engagement will be responsive to what intended outcomes and feedback received in previous engagement. Staff to start taking more ownership of the draft at this point, so Consultant role will be primarily to support staff.

5.7 Final UDC and Zoning Map. Consultant will support City staff through the Adoption Process, attending meetings with the City Council and Planning Board to ensure a smooth and successful adoption. Consultant will create an Adoption Draft and will “train” staff on how to revise and update the documents. This is crucial to build staff understanding, support, and ownership of the code during the process and ensure a smooth transition and handoff of the final document to staff.

5.8 Final Guiding Documents. Consultant will finalize and deliver any Guiding Documents, including identification of necessary updates to related manuals and existing codes, and ensure staff is fully trained on the documents and how to revise or edit in the future.

Deliverables:

- *Draft and Final UDC*
- *Draft and Final updated city zoning map – if recommended by Tasks 3 and 4*
- *Draft and Final Guiding Documents including revised applications, workflows and checklists.*

Task 6: Follow Through

The approach intentionally seeks to build City staff’s understanding and ownership of the UDC throughout the process. Co-creating the draft with City staff, and as the Growth Policy is updated, will help build this ownership, which is key to a smooth implementation.

Consultant will wrap up the project by providing recommendations to City staff for how to manage and maintain the UDC over time, including a schedule for amendments, recommendations on City staff capacity. Consultant will provide summary direction for supporting documents and recommendations for potential additional resources and manuals, if needed, will provide a matrix and process for staff to track performance over time.

Consultant will reserve time for a retainer for the first year after project completion and will participate in a 1 year check-in.

Deliverables:

- *Orientations/trainings for city staff, decision making bodies and/or community over the first year after project completion*
- *30 hours of project support on retainer for the first year after project completion*
- *1 year check-in*

Scope and Budget Assumptions

The following assumptions were used to develop the scope of work and associated budget:

1. City staff will provide a single, consolidated set of substantive edits for each draft document prepared for this project. All disagreements between commentators must be resolved by the client before providing a single set of comments to MUD.
2. The budget assumes that the client will be responsible for all printing, packaging and mailing costs related to the project including agendas, noticing requirements, and other materials for public meetings, Planning Board meetings, City Council meetings, and any other meetings as part of this project.
3. The City will provide MUD with a complete and up-to-date GIS database that includes the existing conditions necessary for the planning and design process. Our scope and budget assume that the information will be up-to-date and any cleanup work will be completed by the client.
4. MUD assumes that all data and information provided by City staff is accurate and reliable, to the best of staff's ability and understanding. Time spent to revise work based on inaccurate or incomplete information is not included in the scope of work or budget. Any corrections or cleanup work will be completed by the client.
5. City staff will provide MUD with information, data, responses, and review in a timely manner that does not delay the process. MUD assumes a staff review period of two weeks, preceded by at least one week notification period to staff, unless MUD and staff determine a different timeline during project scheduling.
6. The overall project is assumed to be complete within 32 months from contract execution through project completion (excluding time set aside to support staff during the first year, as part of Task 6). Delays extending the process beyond this timeframe caused by the client, outside agencies or others outside of MUD's direct control may require a scope and budget amendment to account for additional project management and coordination efforts.
7. City staff will take the lead in scheduling and coordinating meetings with Commissions, City Council, and the public, including determining meeting location, meeting public noticing requirements, and informing participants of said meeting. MUD will provide support to City staff during these tasks, as defined in the scope.

Schedule:

	2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1: Project Start-Up												
Task 2: UDC Framework												
Task 3: Community Innovation Audit												
Task 4: Growth Policy Update			*	*	*	*						
Task 5: Unified Development Code												
Task 6: Follow Through												
*Work By Community Planning Staff												

CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

through

DEVELOPMENT OF A UNIFIED DEVELOPMENT CODE

Consultant Contract

Exhibit B: Compensation

Missoula Comprehensive Code Reform – Exhibit B: Compensation

Compensation:

1. The City of Missoula will compensate the Consultant as follows:
 - a. Total compensation paid to the Consultant for the services of this Contract (inclusive of Reimbursable Expenses and Stipends) shall not exceed Eight Hundred Forty-Nine Thousand Nine Hundred Seventy Dollars (\$849,970.00) based on the fixed hourly rates attached and outlined below. The City shall pay for work associated with each Task identified in the Budget below on an hourly basis based on the Fixed Hourly Rate (shown below) for each member of Contractor's team. The individual budget associated with each task are for tracking purposes. The budget between tasks can be mutually adjusted with the intent that the total contract amount is not exceeded. However each Task identified in the Scope of Work and shown in the Budget below must be completed; in the event more hours than estimated are needed to complete all tasks no additional compensation shall be due to Contractor, and the City shall be under no obligation to pay any additional amounts unless there is a properly executed Addendum to the Contract for additional services as outlined in Section 4 of the Contract.
 - b. The funding for this project will be prorated across two fiscal years. The Missoula City Council has approved funding for the first year of the project and allocated half of the project funding in the 2022 Fiscal Year Budget. The remaining project funds are anticipated to be available upon approval by the Missoula City Council in a subsequent Fiscal Year Budget cycle, which is anticipated to be Fiscal Year 2023.
 - i. The 2022 Fiscal Year Budget shall be capped at Four Hundred Twenty-Five Thousand Dollars (\$425,000.00).
 - ii. The subsequent Fiscal Year Budget Shall be capped at Four Hundred Twenty-Five Thousand Dollars (\$425,000.00).
 - iii. The Consultant shall not exceed expenditures of the Fiscal Year 2022 Budget of Four Hundred Twenty Five Thousand Dollars (\$425,000.00) without written consent of the City of Missoula.
 1. The Fiscal Year 2022 Budget is anticipated to cover most of Task 1 (aside from ongoing project management); most of Task 2, part of Task 3 (3.1 through 3.3), and potentially part of Task 4, subject to further scope refinements to be identified in Task 1.1 and Task 2.4, and inclusive of Reimbursable Expenses and Stipends as outlined in this contract.
 - iv. Upon confirmation of approval of the subsequent Fiscal Year Budget, the City will provide written authorization to the Consultant to proceed with the remaining Tasks outlined in this contract. The confirmation is anticipated to cover all remaining Tasks inclusive of Reimbursable Expenses and Stipends. In the event City Council does not approve

funding beyond the first year, the City shall be under no obligation to pay any additional funds to Contractor beyond the \$425,000 identified in subsection (i) above, and the City shall notify Contractor of its intent to terminate the Contract once those funds are expended.

- c. Additional Services associated with this contract shall be computed based on the Fixed Hourly Rates attached.
- d. The Fixed Hourly Rates shall not be modified or adjusted for the term of this contract without prior written confirmation and mutual agreement of both the City of Missoula and the Consultant.

Budget:

Missoula Comprehensive Code Reform Proposed Budget	Estimated Hours	Total Cost
Task 1: Project Start-Up	438	\$66,590
Task 2: Unified Development Code Framework	1,155	\$178,420
Task 3: Community Innovation Audit	1,567	\$247,270
Task 4: Growth Policy Update	514	\$74,510
Task 5: Unified Development Code	1,500	\$232,700
Task 6: Follow Through	60	\$12,000
Tasks Subtotal	5,234	\$811,490
	Stipends for Community Liasons	\$22,400
	Travel Expenses (8 Trips, 3 People Each Trip)	\$16,080
	Grand Total	\$849,970

Missoula Comprehensive Code Reform Proposed Budget	
Travel Expenses Detail	
Airfare per person	\$400
Per diem meal reimbursement	\$60
Number of days per trip	2
Per diem lodging reimbursement	\$150
Number of nights per trip	1
Number of staff per trip	3
Total Travel Expenses per Trip	\$2,010.00
Number of Trips	8

Community Liason Stipends Detail	
Stipend per liason per month	\$200
Number of liasons	8
Number of months	14
Total Stipend Expenses	\$22,400

Fixed Hourly Rates:

METTA URBAN DESIGN		PETER PARK PLANNING
Samantha Suter (PM)	Phoebe Loyd	Peter Park (PIC)
\$ 150	\$ 90	\$ 250

SIX PONY HITCH		FUTUREWEST	MORE SKY LESS CEILING
Spider McKnight	Travis Wilson	Randy Carpenter	Rachel Cain (CE)
\$ 250	\$ 150	\$ 135	\$ 150

CASCADIA PARTNERS						
Alex Steinberger	Robert Liberty	Jamin Kimmell	Irene Kim	Ayano Healy	Julia Michel	Associate
\$ 210	\$ 155	\$ 180	\$ 180	\$ 150	\$ 150	\$ 130

CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

through

DEVELOPMENT OF A UNIFIED DEVELOPMENT CODE

Consultant Contract

Exhibit C: Request for Proposal

CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

through

DEVELOPMENT OF A UNIFIED DEVELOPMENT CODE

REQUEST FOR PROPOSALS

Prepared by

Community Planning, Development & Innovation

Address: 435 Ryman Street

Missoula, Montana 59802

Phone: 406-552-6080

Issued: December 12, 2021

The proposal shall be submitted as one electronic document via email in a printable PDF format as outlined in the Submission Deadline and Contact Information Section located on page 10. The proposal may include links to other documents and/or appendices; however, the proposer should not assume these will be reviewed. All content the proposer feels is necessary for selection should be included in the body of the proposal, which shall not exceed twenty-five (25) 8.5x11 inch pages single-sided.

SUBMITTAL DEADLINE: 4:00 PM, Mountain Standard Time, January 20, 2022

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INTRODUCTION

The City of Missoula is requesting proposals for consultant services to partner with the City of Missoula to develop a modern, updated and unified development code. The consultant shall offer a professional urban planning team with demonstrated experience in visioning, evaluating, researching, merging, and writing land use regulations to develop a Unified Development Code (UDC) for the City. The City of Missoula desires a UDC that is modernized, updated, streamlined, consistent, clear, aligned, and user-friendly. The regulatory work, including subsequent zoning map amendments, must be responsive to city values and policies given consideration of the City's comprehensive plan (Our Missoula, City of Missoula Growth Policy). In addition, it shall be coordinated with the Growth Policy Update process.

The primary skill set of the consultant team shall emphasize experience in developing a Unified Development Codes. To get there, the City is seeking a multidisciplinary team of land use planners, facilitators, designers, and code specialists with a demonstrated background in innovative community engagement protocols. The team shall offer expertise in zoning and other land use regulations, process auditing, equity in land use auditing, national and Montana land use law, transportation, architecture and design, historic preservation, utility infrastructure, environmental resource protection, development financing, implementation of sustainability initiatives, and community planning including policy development. The team should offer a strong public communications and marketing background that emphasizes community engagement with a focus on equity, diversity, and inclusion.

BACKGROUND

Community Overview

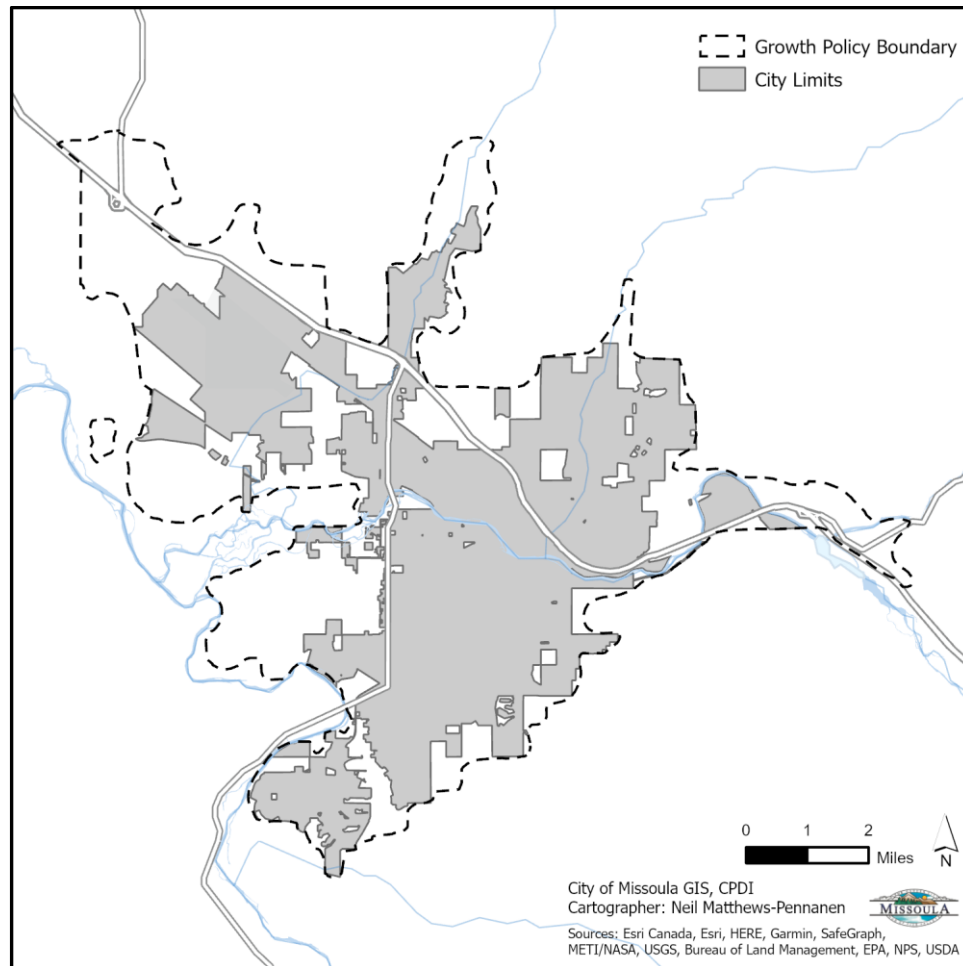
Missoula is the regional center of Western Montana. It is a steadily growing, contemporary western city set in the northern Rocky Mountains near the confluence of the Clark Fork, Blackfoot, and Bitterroot Rivers in a landscape that retains most of its natural quality. Its close proximity to pristine wild lands and natural systems is unmatched for a city its size and strongly defines its character.

Missoula County is located on the ancestral land of the Séliš (Salish or "Flathead") and Ql'ispé (Kalispel or "Pend d'Oreille") Nations, and was and is a place also used by other Indigenous peoples, whom non-Indian settlers forced from the Missoula valley, sanctioned by the U.S. government.

The City of Missoula was founded in the 1860s. Growth was spurred on by many sources, especially the lumber industry and proximity to the railroad, as well as the establishment of larger institutions, such as the University, U.S. Forest Service regional office, and regional hospitals. These institutions further sparked development and growth, and currently, the University of Montana and regional medical facilities are internationally respected and are major components of the local economy. Missoula is also an important regional retail and transportation center.

From a growth standpoint, Missoula has been somewhat resilient to outside economic forces over time. Since its founding, the City has seen several up and down economic cycles but overall has maintained a steady growth rate of about one and a half percent per year. The growth rate is generally expected to remain about the same, and the population of the urban growth area is estimated to be 107,000 by 2035. In 2020, there were 43,000 housing units in the Urban Service Area and a population of 93,000.

Missoula's built environment is shaped, and constrained, by a mountain valley landscape. The space for growth into easily available greenfield sites is diminishing quickly. The City is connected through a transportation system that relies heavily on automobiles, but also includes strongly supported and growing transit and trail systems. A variety of established residential neighborhoods fill out the majority of the City, many with their own distinct character and identity. Several distinct residential and commercial neighborhood centers, accented by an enterprising business element and highly rated education system, create an exciting and vibrant community environment.



Area of Missoula City Growth Policy Boundary

Like most places around the country, Missoula is not immune from many contemporary issues, including income inequality and other equity challenges; high costs of housing and issues related to houselessness; and environmental impacts due to climate change. These issues, as well as others, have been addressed in much of the policy work that has occurred recently, including the development of the city's first housing policy, annexation policy, equity (JEDI) resolution, and adopted climate action goals, along with a wide range of other recent planning efforts. However, the task that lays before us now is to implement these various policy initiatives in a way that is meaningful and effective.

Project Foundation

The City of Missoula adopted a bold and comprehensive planning document in our [City Growth Policy](#) in 2015. With an eye toward future affordable and equitable growth, the City seeks to continue its

implementation of the vision set forth in the Our Missoula City Growth Policy. This Policy includes an underlying theme of sustainability and generally addresses the health and wellness of the community. The City Growth Policy recommends modifying and amending development regulations to provide more options for affordable housing, and that reflect sustainable design, smart growth, and new building practices. It also recommends creating zoning districts and rezoning land to allow for diverse housing that is compatible with the surrounding areas.

One of the foundational policy directives, stemming from the City's growth policy, is to 'focus inward,' which is a land use principle that encourages new growth in the direction of existing infrastructure, neighborhoods, and public services. The Focus Inward concept prioritizes shifting from developing vacant land on the outskirts of the urban area to redevelopment of central areas with existing services. Focus Inward promotes sustainable urban development and re-use rather than consumption and expansion into open space, agricultural resources, and natural areas. The Policy encourages preservation of neighborhoods and community assets while making more efficient use of underutilized or undeveloped spaces. As the foundation for the City's Growth Policy, the strategy is aimed at reducing automobile dominated suburban development which not only helps to improve community health, cost of living, lower city infrastructure and service costs, but also mitigates the effects of climate change and lessens use of carbon-based fuels and subsequent greenhouse gas production.

The most recent version of our zoning code was established prior to the adoption of the Growth Policy and requires modernization and consolidation to provide us with the tools needed to actualize the goals outlined in the Policy. Currently, our development regulations can be found in a series of different codes, manuals, and administrative documents. This dispersed approach increases the instances of conflicting requirements and recommendations and makes alignment, clarity, and consistency challenging for both staff and the public. After years of providing incremental updates and fixes, the City looks to implement comprehensive code reform that provides the City with a UDC that will guide and promote growth towards our goals in the areas of housing, sustainability, and equity.

The [City Strategic Framework](#), modeled after the City's Growth Policy, emphasizes the need to establish shared design standards for utilities, transportation and green infrastructure. It prioritizes the need to amend and align development regulations to improve clarity and consistency and to implement land use recommendations from our housing policy, "A Place to Call Home." Additionally, the Strategic Framework establishes the need to conduct a zoning audit to assess how current zoning policies impacts affordable housing and its geographic distribution and how they may inhibit the development of inclusive, diverse and equitable housing as well as economic development in all neighborhoods. All of these aspects will be considerations of the comprehensive code reform project.

In the winter of 2020, we conducted a review of the City subdivision and townhome exemption development regulations to consider current practices and challenges that impede efficient and effective implementation of the regulations in support of new development. The result of the review was a [Recommendations Report](#) that identified key priorities including addressing consistency, clarity, alignment, and balance. Recommended Priority Actions from the Report includes adopting a UDC and aligning regulations to policy documents.

The process for this Comprehensive Code Reform Project is the next logical step in furthering City goals, strategic steps, and recommendations.

NOTE: Links to full documents for plans and reports listed above can also be found in Appendix B.

Project Goals

1. Develop a Unified Development Code with the intent to modernize growth and development regulations.
2. Apply regulatory revisions and updates that address city goals including consideration of equity, health, sustainability, climate action, and access to affordable housing.
3. Update the current regulations to reduce impediments for development with the intent to promote incremental, well-conceived, innovative, and responsive approaches to neighborhood and community revitalization.
4. Encourage innovative development that is responsive and adaptive to the evolving economic, social, and cultural aspects of the community while preserving and celebrating its history.
5. Create accessible, walkable, vibrant, streets and neighborhoods.
6. Reform outdated and inconsistent development regulations.
7. Encourage neighborhood growth that provides diverse, attainable, housing options throughout the community.
8. Promote the City Growth Policy elements such as economic health, safety and wellness, quality of life, livability, and environmental responsibility.
9. Ensure a collaborative, efficient, and inclusive process both in development of the UDC and its implementation.
10. Help implement housing, transportation, and other adopted plans and policies.
11. Develop a UDC that provides aligned, clear and consistent rules, efficient processes resulting in predictable outcomes, and includes incentives for inclusive and environmentally friendly development.

Project Budget

The overall project budget is \$850,000, inclusive of all consultant fees, City expenses, and other applicable project fees. Fees and expenses will be payable over the course of the scheduled work. The City will enter into contract with the successful firm to complete the full scope of work. The Missoula City Council has committed to fully funding the project and allocated half of the project funding in the 2022 Fiscal Year Budget, adopted on July 1, 2021. The remaining project funds are anticipated to be available upon allocation by the Missoula City Council in the Fall of 2022.

SCOPE OF SERVICES

Project Expectations:

The intent of this project is to create a UDC that achieves the aspirational elements of City policy and fulfills project goals as stated above. The final UDC will integrate all City development regulations (including but not limited to zoning, subdivision, parks, and engineering regulations, as well as additional elements listed below) into one code and update the regulations to be responsive to Missoula's current and emergent land use needs, especially through the lens of affordability, equity, and sustainability.

The process of developing the UDC is anticipated to involve two concurrent paths; one path that focuses on **Implementation** and another path that focuses on **Innovation**. The Implementation track will establish a baseline (first phase) UDC that evaluates current land use development processes and regulations and combines current regulations with an eye for creating consistency and syncing processes

and regulations together. This track continues as an updated (second phase) UDC based on the outcomes of the Innovation track. The **Innovation** track includes broad, inclusive community engagement to audit City policies and regulations for alignment and new direction – referred to as a ‘community innovation audit.’ Early in the exploration of new ways that the City should modernize and update the regulations is the need to conduct an analysis of our land uses regulations and the land use designation map through a lens of equity, in order to better understand whether impacts from growth are shared such that no neighborhood is exempt from change, but no neighborhood should experience sudden, radical change. Innovative concepts that could be considered include a range of approaches to regulations that meet the needs of our changing community including areas of form-based code, zoning map amendments, or other modernized, highly illustrative, and innovative regulations that support equitable and sustainable development.

A Community Innovations Audit Report, and Framework for Next Steps, shall be prepared as the outcome of the Community Innovation Audit and is intended to clarify next steps in updating the City’s Growth Policy, and updating the UDC (second phase), and which could involve changes to the Growth Policy Designation Map and/or the City zoning map.

Overall, the comprehensive process will involve tasks that provide deliverables along the way; include the community throughout the time frame; interface with the growth policy; and move forward in an informed way to create the regulations that are best suited to fill the needs of this community, unique to Missoula (see Appendix A for a draft Scope of Work).

Applicable Regulations

Current code provisions related to development are not only numerous but are also outdated and cumbersome to navigate. Some regulations use contradictory language when read in tandem with others provisions in different parts of the code. There is a lack of graphics, illustrations, and clear and consistent definitions. There are insufficient cross-references, outdated standards and design guidelines, and vague and ambiguous language. The following land use regulations and manuals are expected to be analyzed to determine extent of integration, and then aligned and updated as needed:

1. Title 20: Zoning Code
2. Title 12: Streets, Sidewalks, and Public Places
3. Title 21: Sxwtpqyen Form Based Code
4. Other Titles (sections thereof)
 - a. Title 5: Licensing
 - b. Title 13: Public Services
 - c. Title 15: Buildings and Construction
 - d. Title 16: Manufactured Housing and Mobile Home Parks
 - e. Title 18: Floodplain
5. City of Missoula Subdivision Regulations
6. Planned Unit Developments, Special Districts, and associated Title 19.
7. The Public Works Standards and Specifications Manual ([Link](#))
8. The Missoula Parks and Recreation Design Manual ([Link](#))

NOTE: Unless otherwise noted, all regulations listed above can be found on the Missoula City Laws webpage (Titles): <https://www.ci.missoula.mt.us/268/City-Laws-Regulations>, or the Planning Documents and Regulations page: <https://www.ci.missoula.mt.us/1506/Plans-and-Regulations>

Preparation of the UDC will consider the City's applicable plans, studies, and design guidelines, and will work with all applicable City policies (see Appendix B for links to supplemental documents). Preparation of the UDC will also consider dovetailing planning projects (see Appendix C) and require consultation coordination with those project leads as needed.

Community Involvement

For this project to be effective, it must include meaningful input from, and involvement by, community members, business owners, landowners, appointed/elected officials, city staff, and stakeholders, with an emphasis on traditionally disenfranchised populations. The City of Missoula puts strong emphasis on ensuring participation early, and in every stage of the process, and will therefore place an emphasis in the selection process on consultants who demonstrate skill and experience with developing and encouraging creative and effective public participation.

The proposal shall include the framework of a community engagement strategy that describes the following:

- a comprehensive strategy for gathering and responding to input at key points in the process; and
- creative ideas for obtaining public input outside of formal public meetings and surveys.

The selected consultant will be responsible for organizing and either leading or co-leading public meetings and input opportunities with City staff. In addition, the consultant should expect to partner and coordinate with the City Engagement Specialist. See Appendix D for Draft Project Engagement Expectations.

Expectations of Consultant:

Generally, integrated with the scope of work (draft described in Appendix A) and the public engagement expectations (Appendix D), the selected Consultant will be expected to complete certain tasks, including but not limited to:

- Draw upon best practices from national trends and peer communities in determining potential processes, approaches, and regulatory changes.
- Manage a phased approach to developing a Unified Development Code.
- Provide comprehensive and timely reviews of draft reports, annotated outlines, and proposed amendments to regulations.
- Participate in presentations to reviewing boards and governing body throughout the process.
- Provide regular updates on the project's progress through a method that is mutually acceptable to staff and to the selected consultant.
- Develop a project webpage for the duration of the project, which includes the project status, upcoming events, and opportunities for community input.
- Provide digital files of documents for distribution during the review and comment phases of the project.
- Develop and track project communications including but not limited to meeting notes, comment reviews and responses, etc.

- Provide analysis that summarizes content and provides a succinct summary of review and approval criteria for various stages of review including in advance of Planning Board and City Council considerations.
- Provide modifiable digital files of approved documents and graphics via a mutually agreed upon file sharing platform.
- Provide digital files of the approved UDC (baseline and updated) in a format as required by the City's third-party codification service provider – Municode.

The consultant team may suggest additional components as part of the RFP response. Appendix A includes a draft scope of work for the project. Amendments to that process may also be considered as long as ultimate goals for engagement and code revisions are met. Before proceeding with work tasks, the selected consultant will be required to prepare a final scope of work and schedule, which will be included in the final contract agreement to be executed by the City and the consultant. The desired completion date for this project is 30 months from date of contract agreement. The exact date and time frame will be based upon a mutually agreed upon time frame to be negotiated with the consultant.

Role of City Staff

City staff will be available to the consultant team during the extent of the project. The City's Community Planning Division will be the single primary consultant liaison for the City. City staff will: provide background information; attend scoping and progress meetings; contribute technical resources for code amendments; attend and participate in community engagement efforts; provide document review; and provide production of copies of documents.

Additionally, while the consultant team is involved in the comprehensive Community Innovation Audit and developing the baseline (first phase) UDC, Community Planning staff will be developing updated foundation material related to an update to the City's Growth Policy. This includes an update to the Community Profile; the development of a User Guide for the Growth Policy; refinement of already established growth policy goals, objectives, and actions; and preparation of technical edits to the Policy document and Future Land Use Map. The Community Planning staff team will work closely with the consultant team to gather value/vision insights and recommendations from the equity audit of land use and zoning, that may contribute updates to the Growth Policy.

City development review staff will also be integral in developing follow-through material as described in the last phase of the project.

Work Plan and Timeline

See Exhibit A for additional information describing the proposed scope of work and timeline.

SUBMISSION REQUIREMENTS:

Qualifications

- Licensed to do business in Missoula, or become licensed in advance of contract execution.
- Experience developing and adopting Unified Development Codes.
- Experience auditing growth and development regulations in conjunction with community policy.
- Experience reviewing and recommending growth policy (comprehensive plan) directives.

- Experience working with community members, elected officials, appointed board members and agency representatives.
- Familiarity with local community issues and ideas and ability to identify national trends that would be appropriate to integrate into the City of Missoula community.
- Excellent communication and community relations skills.

Proposal Content

The consultant shall provide a clear, concise submittal that will address the firm's ability and experience in complying with the scope of work requirements set forth in this RFP. Interested firms are invited to submit proposals that contain the following information, organized in the following sections:

1. Title Sheet: The title sheet must provide the name of lead consultant and name(s) of the subconsultant(s) with the name of the prime contact clearly identified.
2. Letter of Intent: Describe your interest in this project and your understanding of the scope of work. Outline any unique features or conditions that appear to need special attention that the consultant may be particularly well qualified to address. Generally, describe the roles and responsibilities of the lead consultant as well as any subconsultants.
3. Structure and Personnel: Describe the following:
 - i. The contact information (name, address, phone number and email address) of key personnel.
 - ii. Form of organization – whether the firm is a partnership, corporation or sole proprietorship, and names of principals, officers, and directors of the firm.
 - iii. Key personnel – names of key personnel, their respective titles, proposed roles on the project team, experience especially related to working on and completing land use code updates, technical knowledge as outlined throughout the RFP, and periods of service with the firm.
 1. Also include information about any sub-consultants that might be used to perform services such as address, telephone number, contact person, names and job descriptions of key personnel (i.e. areas of expertise), and whether you've worked with them in the past.
 2. A brief statement of the availability and extent of role and participation in the project of key personnel.
4. Experience: Describe your experience in managing projects that demonstrate similar services by providing the following:
 - i. A description of the firm's experience providing similar services for public sector clients.
 - ii. List all public sector clients for whom you performed similar work in the past five years.
 - iii. At least three recent comparable project summaries which demonstrate pertinent key personnel experiences in ordinance writing. Summaries should include:

1. Community, population, and geographic size.
 2. Scope of work, type of ordinance, and topic of ordinance.
 3. Current status with project timeframe and completion year if applicable.
 4. Reference contact information (name, title, community, and current telephone and email).
 5. Link to completed ordinance.
 6. Additional relevant information may be included.
5. Project Approach:
 - i. Provide a description of how the firm intends to approach the anticipated scope of work and associated deliverables described here and further described in Appendix A.
 - ii. Provide a framework of a community engagement strategy that describes your proposed philosophy and approach used to involve diverse perspectives and stakeholders and takes Appendix D into consideration. Include innovative approaches to directly incorporating and addressing input and feedback from groups who are left out of traditional public processes. Additionally, provide a description of how you propose to work with the City Engagement Specialist.
 - iii. Share your perspective on unique aspects of the project and possible alternative approaches for the City of Missoula to consider.
 - iv. Provide a scheduled timeline of benchmarks and task. This includes the overall estimate for final draft completion and adoption.
6. Cost Proposal and Fee Schedule:
 - i. Estimated proposed fee for completion of the project services with fixed and additional service fee options.
 - ii. Submit a not-to-exceed cost breakdown of the project, including hourly rates for all team members including sub consultants, estimated total travel and material expenses, and any other reimbursable costs as separate line items, for the work identified by the consultant in the Project Approach section of the proposal submittal.
 - iii. A list of anticipated reimbursable expenses and the rate charged for each.
 - iv. Any other fees or charges.
7. Miscellaneous: Any other information that you believe would make the firm's work on behalf of the City of Missoula superior to that of other firms.

Communications with City Staff prior to Selection of Proposal

It is incumbent upon each respondent to carefully examine these specifications, terms, and conditions. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information shall be made in writing via email through the designated staff person. Respondents are hereby notified not to contact any member of the Selection Committee, except as provided herein, regarding this proposal until such time as a contract has been awarded. Failure to abide by this condition of the RFP may be cause for the rejection of the firm's proposal. The City shall not be responsible for any oral representation(s) given by any employee, representative, or others.

Questions will be accepted through Thursday, December, 22, 2021, and must be submitted to Ben Brewer at the City of Missoula, Community Planning, Development and Innovation (CPDI). Answers to questions will be provided to all consultants on Friday, December 30, 2021.

Clarification and Addenda to the RFP

The issuance of a written addendum is the only official method whereby interpretation, clarification, or additional information will be given. If it becomes necessary to revise or amend any part of this RFP, a good faith attempt will be made to notify all prospective respondents. All addendums will be posted on the City of Missoula BID Postings website at <https://www.ci.missoula.mt.us/bids.aspx>.

Submission Deadline and Contact Information

Proposals must clearly delineate your ability to successfully complete the project. The deadline for submission is 4:00 P.M., Mountain Standard Time, January 20, 2022.

The proposal shall be submitted as one document via email or download link in a printable PDF format submitted to the address below. Faxed submittal and late submittals will not be accepted. The proposal may include links to other documents and/or appendices; however, the proposer should not assume these will be reviewed. All content the proposer feels is necessary for selection shall be included in the body of the proposal, which shall not exceed twenty-five (25) 8.5x11 inch pages single-sided.

Mailing Address:

Community Planning, Development and Innovation, City of Missoula
ATTN: Benjamin Brewer
435 West Ryman St.
Missoula, MT 59802

Contact information:

Benjamin Brewer, brewerb@ci.missoula.mt.us, (406) 552-6086

PROPOSAL SELECTION PROCESS:

Selection Of Proposal

Consultant selection will be considered by a Selection Committee. The Selection Committee will review submitted proposals and may invite the firms that the committee determines to be the most qualified to participate in interviews. The Selection Committee will conduct any interviews and rank the firms based upon their proposal.

The evaluation of firms submitting proposals for the project will be based on the following considerations and their respective weights:

1.	Firm's response to the RFP including overall relevant experience, similar projects, and sub consultant experience.	25%
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2.	The experience and expertise of the specific staff with the firm who are planned to be assigned to this project. Include related experience on similar projects. Provide references for key participants.	25%
3.	The firm's approach/methodology.	25%
4.	Familiarity with the City of Missoula or similar U.S. cities, either through direct planning work or research gathered from previous planning efforts.	15%
5.	The firm's demonstrated ability to meet the schedule.	5%
6.	Cost.	5%

The selected firm will be required to:

- Work closely with Community Planning, Development, and Innovation (CPDI) staff and other City agencies.
- Maintain accurate accounting records and other evidence pertaining to costs incurred in providing services, and on request, make such records available to CPDI at reasonable times during the contract period and for 2 years after the date of the final payment to the firm under contract.
- Be the sole point of contact with regard to contractual matters.
- Refrain from assigning, transferring, conveying, or otherwise disposing of the contract or its rights, obligations or interests therein or its power to execute such agreement to any other person, firm, partnership, company or corporation without the prior consent and approval in writing of the City.

RFP Activity	(Dates)
Issue RFP	December 12, 2021
Deadline to submit questions and requests for clarifications	December 22, 2021
Deadline for response to questions and requests for clarifications	December 30, 2021
Proposal Due	January 20, 2022
Selection Committee tentative interview block	Feb. 16 to Feb. 18, 2022
Selection Committee Recommendation	Feb. 18, 2022
Final Scope of Work and contract development	Feb. 22 to March 11, 2022
Execute Agreement (involves A&F and Mayor signature)	March 28, 2022
Notice to Proceed	TBD upon Council Approval

ADDITIONAL INFORMATION AND CONDITIONS

Statement of Noncommitment

The City of Missoula reserves the right to reject any or all proposals submitted as a result of this RFP and to re-advertise, if such election is deemed to be in the best interest of the City. The City assumes no obligation, no responsibility and no liability for costs incurred by the responding firms prior to issuance of a contract. The City reserves the right to waive any and all irregularities or informalities, and to

determine what constitutes any and all irregularities and informalities. All proposals will become property of the City of Missoula.

RFP Authority

The RFP process is a procurement option allowing award to be based on stated criteria or evaluation factors. Cost will be a consideration in the overall evaluation, but will not be the basis for selection. The evaluation factors to be utilized in this procurement have been specified in the Proposal Selection Process of this RFP.

Acceptance of Terms

Submission of a proposal indicates acceptance by the consultant of conditions contained in this Request for Proposals. Note that all proposal submissions are subject to State and Federal open records laws.

Professional Services Agreement

A professional services agreement in a form provided by the City shall be executed by the Mayor and a duly authorized officer or agent of the chosen consultant prior to commencing any work related to the this contract or any other work requested in this RFP. Minor changes that do not affect the substance of the agreement provided may be considered prior to finalizing the agreement. A template City of Missoula Professional Services Agreement is attached to this RFP as Appendix E and includes expectation for payment, indemnity and insurance, nondiscrimination and affirmative action, default and termination, modification and assignability, ownership and publication.

Notice to Consultant

During the performance of an Agreement, the Consultant, for itself, its assignees and successors in interest, agrees as follow:

Conflict of Interest

The Consultant must disclose in writing any potential conflict of interest to the City in accordance with applicable City policy. This shall include, but not be limited to, disclosing any clients that the Consultant has represented in the last five years with development projects needing City of Missoula permits or development review approval.

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Appendices

Appendix A – Draft Scope of Work

The project should address tasks and deliverables described as follows:

Task 1: Project Start Up

Considerations:

- Work with project team to develop a final scope of work and schedule.
- Develop the final community engagement plan in conjunction with the City Engagement Specialist (see Appendix D: Draft Public Engagement Expectations).
- Consultant, staff, and leadership introductions and roll overview.
- Review of background materials.

Deliverables:

- Project schedule - showing, at a minimum, task deadlines and major milestones.
- Final scope of work.
- Final Community Engagement Plan.

Task 2: UDC Baseline Regulations

Considerations:

- Establish consistent rules for UDC structure (i.e. provide clear definitions for the following types of terms, if used in the UDC –rule, regulation, standard, guidelines, manual, administrative rule, etc.)
- Perform an audit of existing applicable development regulations, guidelines, and rules that include, at a minimum:
 - Evaluation for consistency and compliance with local, state and federal laws.
 - Evaluation for syncing and consistency of terms and processes.
- Conduct a Process Audit, evaluating both administrative and development review procedures, and develop a report identifying issues and recommended actions that should be integrated into the baseline UDC.
- Consider incorporating any potential development regulation amendments from dovetailing projects that have identified clear regulatory outcomes (see Appendix C).
- Integrate recommendations from the process audit as applicable.
- Develop baseline regulations based on an annotated outline.
- Incorporate illustrations and graphics as much as possible in this first phase.
- Provide summary direction for incorporation into the UDC or amendments to supporting documents (at a minimum: The Public Works Standards and Specifications Manual and Missoula Parks and Recreation Design Manual).
- Develop baseline regulation guiding documents such as revised applications, workflows, and checklists.

Deliverables:

- Process Audit Recommendations Report
- Annotated outline of UDC baseline
- Adopted baseline UDC (compatible with Municode)

- Guiding documents including revised applications, workflows and checklists
- Provide a minimum of three orientations/trainings for city staff, decision making bodies and/or community (additional trainings would be negotiated later as an additional service).
- Minimum 20 hours of project support on retainer (additional hours would be negotiated later as an additional service).

Task 3: Community Innovation Audit

Considerations:

- Conduct community vision check-in using current city policies as a foundation.
- Conduct Equity in Land Use evaluation involving assessment of background materials (for context), data collection, and robust community engagement techniques.
- Assess policy gaps or clarifications based on vision check-in and equity in land use evaluation and provide a summary policy directions report.
- Emphasize community form and place-creation rather than use.
- Audit current regulations for alignment and implementation with the City Growth Policy and other City Policy as appropriate.
- Develop recommendations for regulations that support equitable development using contemporary zoning tools.
- Identify ways to implement growth and development related policy action items (from City Growth Policy and other City Policy documents) that meet goals of this project.
- Incorporate recommendations that support innovative and creative approaches to growth and development regulations, building upon the best design principles and practices throughout the United States that are consistent with existing Montana law.
- Pursue methods for accommodating 'gentle infill' throughout the community in a way that is consistent with the City's Housing Policy and based on findings from Equity in Land Use Recommendations Report.
- Consider a health in all policies approach to developing new regulations.
- Consider environmental resource protections including floodplain, riparian resources, steep slopes, and wildland interface (fire prone areas) geared toward safeguarding natural resource and ecologically sensitive areas.
- Consider recommendations for development of green building and energy standards, consistent with existing Montana law, along with appropriate application thresholds.
- Potentially identify streetscape typologies as recommended in the 2021 Missoula Long Range Transportation Plan (Connect Missoula).
- Integrate incentives for affordable housing while also emphasizing preservation of existing housing stock.
- Coordinate with Dovetailing Projects (see Appendix C).
- Conduct analysis (scenario testing) of up to three proposed innovation strategies to yield an understanding of cost/benefits to the community (additional scenarios would be negotiated later as an additional service).
- Develop and vet the Community Innovations Audit Report that identifies and summarizes existing misalignments and gaps between codes and policies, based on input from the various components of this Audit.
- Develop a Framework for Next Steps Report, based on feedback from the Community Innovations Audit Report, that describes potential next steps for innovative amendments to the

baseline UDC, potential changes to the growth policy, and potential zoning map amendments, to be discussed by City Council.

Deliverables

- Community Innovations Audit Report including:
 - Identified inconsistencies, misalignments, and gaps between existing codes and policies
 - Equity in Land Use Recommendations Report
- Final Framework for Next Steps Report, including:
 - Summary Policy Direction
 - Strategy options for future code innovations

Task 4: Growth Policy Update

Considerations:

- Implement recommendations from the Final Framework for Next Steps Report (Task 3)
- Determine additional engagement and assessment as needed
- Coordinate and finalize Growth Policy Update and Future Land Use Map

Deliverables:

- Adopted Growth Policy Update
- Adopted Future land use map update

Task 5: UDC Innovation Update

Considerations:

- Implement recommendations from the Final Framework of Next Steps Report (Task 3).
- Integrate with Dovetailing Projects (see Appendix C).
- Develop draft outline of areas of regulation proposed for amendment.
- Develop UDC regulation amendments.
- Incorporate illustrations and graphics as appropriate.
- Pursue changes to the City zoning map based on outcomes of the finalized Framework of Next Steps (Task 3) and Growth Policy Update (Task 4).
- Develop updated guiding documents such as revised applications, workflows, and checklists.

Deliverables:

- Adopted updated UDC
- Adopted updated city zoning map – if recommended by Tasks 3 and 4
- Updated guiding documents including revised applications, workflows and checklists.

Task 6: Follow Through

Considerations:

- Provide recommendations for approach to managing and maintaining the new UDC
- Provide recommendations for staff capacity that may result from added regulation elements, technical specialties, and new programs.
- Assist with establishing new application forms, workflows, and guide documents
- Provide summary direction for amendments to supporting documents such as the public works/parks manual, and recommendations for potential new Operation and Administrative Manuals.

Deliverables:

- Potential Operations and Administrative Manual.
- Updated applications forms, workflows, and checklists.
- Provide a template for performance metrics tracking.
- Provide a minimum of five orientations/trainings for city staff, decision making bodies and/or community over the first year after project completion (additional trainings would be negotiated later as an additional service).
- Minimum 30 hours of project support on retainer for the first year after project completion (additional hours would be negotiated later as an additional service).
- 1 year check-in.

POTENTIAL TIMELINE:

Project Tasks	FY 2022				FY 2023				FY 2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1: Project Start-Up												
Task 2: UDO Baseline Regulations												
Task 3: Community Innovation Audit												
Task 4: Growth Policy Update			*	*	*	*						
Task 5: UDO Innovation Update												
Task 6: Follow Through												

*Work by Community Planning Staff

Appendix B – Related Policies, Plans, Reports and Resolutions

The following plans and documents relate to this project. They are listed chronologically by year of adoption.

- Our Missoula Growth Policy: 2035 ([Link](#)) 2015
- City of Missoula Zero Waste Plan ([Link](#)) 2018
- Parks, Recreation, Open Space, and Trails Plan ([Link](#)) 2019
- A Place to Call Home: Meeting Missoula’s Housing Needs ([Link](#)) 2019
- City Annexation Policy ([Link](#)) 2019
- 2019 Missoula Downtown Master Plan ([Link](#)) 2019
- City of Missoula Strategic Plan: 2020-2023 ([Link](#)) 2020
- Sx^wtpqyen (S-wh-tip-KAYN) Neighborhoods Master Plan ([Link](#)) 2020
- Missoula Subdivision and TED Regulations Report ([Link](#)) 2020
- Climate Ready Missoula Plan* ([Link](#)) 2020
- Justice, Equity, Diversity, and Inclusion (JEDI) Resolution ([Link](#)) 2021
- Missoula Connect: 2050 Missoula Long Range Transportation Plan ([Link](#)) 2021

Appendix C – List of Dovetailing Projects

The following are already ongoing projects that relate to and will be incorporated into this code reform project.

Transportation Options Action Plan

To accommodate growth sustainably and efficiently, the City of Missoula and the Missoula Metropolitan Planning Organization (MPO) have ambitious goals to get more people walking, biking, taking transit, and sharing rides while increasing access to affordable housing. The [Transportation Options \(TO\) Action Plan](#) will help Missoula achieve these by exploring three topics:

TO Programs: Expand and improve Missoula’s existing transportation options programs through innovation and examples from peer cities.

Incentives and Requirements: Explore ways to require and/or incentivize developers and employers to implement transportation options programs.

Districts and Partnerships: Assess creative approaches to delivering transportation options, including unique programmatic partnerships and corridor, or district, based programs and funding.

The project will develop an action plan to guide programs and investments. It will also assess the current parking requirements in Title 20 and make recommendations for future parking code updates. It will also provide recommended transportation option supported updates to City regulations that could be considered during this comprehensive code reform project.

Missoula Affordable Housing Incentives Analysis

One of the key recommendations from A Place to Call Home, Missoula’s housing policy, is for the City of Missoula to create a formal program that provides incentives to private sector developers to build affordable housing. The primary goal of this type of incentive program is to ensure a portion of new development remains affordable for Missoulians with low- to moderate incomes. An effective incentive program should enhance the resources that existing nonprofit developers can access to develop affordable housing, while also motivating private developers to participate in meeting affordable housing needs at prescribed levels. The incentives program can do this by enabling developers, in return, to reduce costs or increase revenue. Accompanying the formal land use incentive recommendations are suggestions for general land use code revisions that will support more efficient and affordable development across the community. These components together are intended to ensure the incentives align closely with larger community land use goals around infill represented through the Our Missoula Development Guide and the equitable distribution of affordable homes across the city.

The Analysis project specifically involves conducting research and feasibility to determine potential levels of incentives that could be made available in support of affordable housing development. It will culminate in a Summary Memo that details which incentives are effective and which are not. This

information will be used to determine specific implementation tracks likely including changes to zoning and coordination with the Code Reform project.

Then Phase II will be figuring out what we need to do to implement – likely either modifications to Title 20 to include the incentives and a program guide document to operationalize the program. We have delayed planning exactly what that phase looks like yet pending this major code reform and pending the outcome of the feasibility work.

Targeted Subdivision Amendments

Amendments to City subdivision regulations are currently being developed to account for recent changes in State law. The changes are targeted to address state law changes specifically and will be completed ahead of when this project begins.

Midtown Master Plan

Efforts have begun by the Missoula Midtown Association to conduct a planning effort for the midtown area as described in their initial [white paper](#).

Regulation Edits to Title 12.

Sidewalk Postponements, Private Utility Relocations, and Urban Forest.

2023 State Legislative potential changes.

A statewide Land Use Work Group is vetting possible changes to state laws that guide/direct processes and foundational laws for land development activity including city zoning, subdivisions, and exemptions to subdivision. Any potential changes could be a consideration at the next State legislative session, which convenes in January of 2023.

Miscellaneous Projects

We anticipate that other critical projects as identified by the Executive Leadership Team (see Appendix D) will need to be considered to some extent for how and whether they can or should be incorporated into the Comprehensive Code Reform Project.

Appendix D – Draft Project Engagement Expectations

This is a complex and multi-faceted project that will require input and coordination between various and disparate groups, both internally within city agencies, and amongst the community at large. We envision a tiered approach to project engagement and support, which will be incorporated into a Community Engagement Plan to be developed by the consultant team.

The city plans to support a robust public engagement process by expecting expertise from this consultant pertaining to project communications, project engagement and public participation. The City of Missoula puts strong emphasis on ensuring participation early, and in every stage of the process. In addition, the consultant should expect to coordinate with a City Engagement Specialist.

The planning process will incorporate a comprehensive strategy to include meaningful input from, and involvement by, community members, business owners, landowners, appointed/elected officials, city staff, and stakeholders, emphasizing disenfranchised populations. This will require innovative approaches to working directly with groups who are left out of traditional public processes. The following project engagement expectations are described from the perspective of four groups: project professionals, city internal teams and support, public boards and decision-making bodies, and community groups.

Project Professionals:

Project Consultant Team: The Project Consultant Team will act as project lead, expertise in review, research, recommendations, and implementation of land use regulations updates and combining as a Unified Development Code. This team requires the ability to manage several avenues of input, balance policy work with land use regulation and process improvements. It hinges on the ability to provide technical assistance, analytical review, concept mapping and research based on best practices and Missoula unique insights. The consultant team will also include expertise in communications and engagement and will be expected to collaborate with a City Engagement Specialist for amplified community insights, especially from community members not typically reached in public process. The Project Consultant Team will help to turn the information collected from the City Engagement Specialist (describe below) into viable, informed, and innovative approaches to growth and development regulations.

City Internal Teams and Support

The Project Consultant is expected to engage with each of these internal teams at various levels throughout the projects:

Project Manager: The Community Planning Supervisor provides oversight with direct involvement by the Long Range Planning staff in the Community Planning Division of CPDI.

Executive Leadership Team: This Team will resolve leadership-level internal questions related to strategic oversight; milestone decisions; and final goal setting. The Executive Leadership Team will also help to maintain consistency with relationships to other projects/agencies.

City Core Group: The City Core Group helps to guide overall approach; receive progress reports; report to the Executive Leadership Team; identify touchpoints; identify key issues to explore in the auditing process; affirms goals of the comprehensive project; and provides comprehensive guidance to the overall project. This group will involve some participation in consultant selection.

Innovation Functional Work Team: This functional work team provides support and guidance for issue/opportunity observations and alignments and helps with foundational information, especially related to developing new and innovative approaches to implementing City policies related to land use.

Implementation Functional Work Team: This functional work team provides support and guidance for technical issues, opportunities, and innovations related to this project, and consists of representatives of internal CPDI divisions along with City agency representatives as deemed necessary. This group helps to identify and problem solve for technical issues and considerations that factor into development of a UDC, and may also be asked to review material and assist with any focus groups.

City Engagement Specialist: The City Engagement Specialist will provide expertise in seeking out and amplifying resident voices and input from groups who are typically left out of traditional public processes by using innovative resident-driven engagement models, awareness of best practices, and customization of potential communication tools that respond to Missoula's unique needs. The City Engagement Specialist will help to gather and identify the ideas, issues, and concerns that the community hopes to address. They will collaborate with the Project Consultant Team in shared engagement techniques and provide insights into project communications as appropriate and as needed.

Communications Team: This team provides early guidance on the expectations for the consultant related to branding, social media, innovative website, engagement techniques and message pillars, as well as assistance with set up for engagement and deliverable distribution throughout the process. This team will also work closely with the City Engagement Specialist.

Project Support: Participation by all CPDI staff is anticipated in the project at various stages of the project. Staff roles will be especially helpful in functional work teams, assistance with focus groups, conducting specific research associated with the project, review of material, and community engagement.

Public Boards and Decision-making Bodies

The Project Consultant is expected to engage with each of these Boards and Governing Bodies at various levels throughout the projects:

City Council: City Council members will be provided regular updates and encouraged to participate throughout the process. City Council will have final approval of all ordinances and resolutions.

Planning Board: The Missoula Consolidated Planning Board members will be regularly informed of the process and progress, and representatives will be asked to participate in other team or focus group

roles. Planning Board will present their recommendations on the project for City Council's final consideration.

Boards/Commissions: City boards like the Design Review Board, Board of Adjustment and Historic Preservation Commission will be approached to pursue insights and input at various stages of the process.

Community

The Project Consultant and City Engagement Specialist are expected to engage with the Community at various levels throughout the projects. In addition to innovative processes for gathering community insights for the community at-large, we also suggest establishing a Steering/Advising Committee and the use of focus groups.

Community Members: With regard to public outreach and engagement, the planning process will incorporate a comprehensive strategy to engage public and private businesses, residents, and stakeholders, emphasizing disenfranchised populations. This will require innovative approaches to working directly with groups who are left out of traditional public processes.

Steering/Advising Committee: This committee is an inclusive and diverse group that is representative of the issues and elements that this project addresses as well as the general demographic makeup of the Missoula community, and it acts to provide community perspective throughout the process. The committee will be a sounding board for balancing policy development and implementation ideas from the various focus groups, work teams, and community members.

Focus Groups: These groups will be established as needed and will help to provide unique perspectives and input on various subject matter related to land use regulations and city policy.

Appendix E – City of Missoula Professional Services Agreement

PROFESSIONAL SERVICES AGREEMENT

THIS AGREEMENT is made and entered into this ____ day of ____, 20__, by and between the **CITY OF MISSOULA, MONTANA**, a municipal corporation organized and existing under the laws of the State of Montana, 435 Ryman St., Missoula, MT 59802, referred to here as “City,” and _____, whose principal place of business is located at _____, Missoula, MT 598__, hereinafter referred to as “Contractor.”

RECITALS

WHEREAS, the City desires to utilize Contractor to furnish independent services in connection with _____ involving _____; and

WHEREAS, Contractor has represented to the City that Contractor has the necessary expertise to furnish said services and has available to Contractor the necessary staff and resources to perform the independent services in a timely manner consistent with the nature of the project.

NOW THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties agree as follows:

1. **Purpose:** City desires to have Contractor _____.
2. **Effective Date:** This Agreement is effective upon the date of its execution by both parties and will terminate on the ____ day of _____, 20__, or upon 30 days’ notice by the City to Contractor of its desire to terminate the Agreement by giving such notice to Contractor’s designated liaison identified below.
3. **Scope of Work:**
 - a. Contractor will perform the work and provide the services in accordance with the requirements of the Scope of Services attached here to as Exhibit A; and
 - b. If authorized in writing as provided in this subsection, Contractor shall also furnish additional services. To the extent additional services have been identified at the time of executing this Agreement, they are itemized in Exhibit A and will be paid for by City as indicated in Section 4. As further additional services are requested of Contractor, this Agreement may be modified and subject to mutual consent by execution of an addendum by authorized representatives of both parties, setting forth the additional scope of services, their performance time schedule, and the compensation for such services.

4. **Payment:**

a. City agrees to pay Contractor for services outlined in Exhibit A in accordance with the terms and conditions laid out in Exhibit B – Compensation, and Contractor shall be compensated for additional services authorized pursuant to Section 3.b. above, which have not been identified at the time of executing this Agreement as more particularly described in a fully approved and executed addendum to this Agreement. Payment for work beyond that described in Exhibit A or as contained in a fully approved and executed addendum to this Agreement is expressly denied without prior written authorization from City. Such authorization must include signature of the Mayor.

b. Contractor shall submit monthly statements for basic and additional services rendered. City shall pay Contractor within 30 days of receipt of an itemized invoice for the services rendered or shall notify Contractor of any dispute by City concerning the performance of any services and the basis therefore and shall pay Contractor within thirty days for the services not in dispute. If any items are disputed by City, Contractor and representatives of City shall meet and confer regarding the disputed items within ten business days after City notifies Contractor of the services in dispute. City shall pay for any disputed services for which the dispute has been resolved to the satisfaction of the City within thirty days after such resolution.

5. **Independent Contractor Status:** The parties agree that Consultant, is an independent contractor for purposes of this agreement and the parties agree that Consultant is and shall be an independent contractor when performing services pursuant to this agreement. Consultant is not subject to the terms and provisions of the City's personnel policies handbook and may not be considered a City employee for workers' compensation or any other purpose. Consultant is not authorized to represent the City or otherwise bind the City in any dealings between Consultant and any third parties.

Consultant shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Consultant shall maintain workers' compensation coverage for all members and employees of Consultant's business, except for those members who are exempted by law.

Consultant shall furnish the City with copies showing one of the following: (1) a binder for workers' compensation coverage by an insurer licensed and authorized to provide workers' compensation insurance in the State of Montana; or (2) proof of exemption from workers' compensation granted by law for independent contractors.

6. **Indemnity and Insurance:** For other than professional services rendered, to the fullest extent permitted by law, Consultant agrees to defend, indemnify, and hold the City harmless against claims, demands, suits, damages, losses, and expenses connected therewith that may be asserted or claimed

against, recovered from or suffered by the City by reason of any injury or loss, including but not limited to, personal injury, including bodily injury or death, property damage, occasioned by, growing out of, or in any way arising or resulting from any intentional or negligent act on the part of Consultant or Consultant's agents or employees.

For the professional services rendered, to the fullest extent permitted by law, Consultant agrees to indemnify and hold the City harmless against claims, demands, suits, damages, losses, and expenses, including reasonable defense attorney fees, to the extent caused by the negligence or willful misconduct of the Consultant or Consultant's agents or employees.

For this purpose, Consultant shall provide City with proof of Consultant's liability insurance issued by a reliable company or companies for personal injury and property damage in amounts not less than as follows:

- Workers' Compensation—statutory
- Commercial General Liability—\$1,000,000 per occurrence; \$2,000,000 annual aggregate
- Automobile Liability—\$1,000,000 property damage/bodily injury; \$2,000,000 annual aggregate
- Professional Errors and Omissions Liability—\$1,000,000 per claim; \$2,000,000 annual aggregate

City shall be included or named as an additional or named insured on the Commercial General and Automobile Liability policies. The insurance must be in a form suitable to City.

7. Professional Service: Consultant agrees that all services and work performed under this agreement will be accomplished in a professional manner, in accordance with the accepted standards of Contractor's profession.

8. Compliance with Laws: Consultant agrees to comply with all federal, state and local laws, ordinances, rules and regulations.

9. Nondiscrimination and Affirmative Action: Consultant agrees and shall comply with the following Non-Discrimination and Affirmative Action policies:

NON-DISCRIMINATION. All hiring shall be on the basis of merit and qualification and there shall be no discrimination in employment on the basis of race, ancestry, color, physical or mental disability, religion, national origin, sex, age, marital or familial status, creed, ex-offender status, physical condition, political belief, public assistance status, sexual orientation, or gender identity/expression, except where these criteria are reasonable bona fide occupational qualifications.

AFFIRMATIVE ACTION POLICY. Contractors, subcontractors, sub grantees, and other firms doing business with the City of Missoula must be in compliance with the City of Missoula's Affirmative

Action Plan, and Title 49 Montana Codes Annotated, entitled “Human Rights” or forfeit the right to continue such business dealings.

The City’s Affirmative Action Policy Statement is:

The Mayor of the City of Missoula or the Mayor’s designee may adopt an affirmative action plan to provide all persons equal opportunity for employment without regard to race, ancestry, color, handicap, religion, creed, national origin, sex, age, sexual orientation, gender identity or expression, or marital status. In keeping with this commitment, we are assigning to all department heads and their staff the responsibility to actively facilitate equal employment opportunity for all present employees, applicants, and trainees. This responsibility shall include assurance that employment decisions are based on furthering the principle of equal employment opportunity by imposing only valid requirements for employment and assuring that all human resource actions are administered on the basis of job necessity.

Specific responsibility for developing, implementing, monitoring and reporting are assigned to the City Personnel staff under the supervision and direction of the Chief Administrative Officer and the Mayor.

It is the policy of the City of Missoula to eliminate any practice or procedure that discriminates illegally or has an adverse impact on an “affected” class. Equal opportunity shall be provided for all City employees during their terms of employment. All applicants for City employment shall be employed on the basis of their qualifications and abilities.

The City of Missoula, where practical, shall utilize minority owned enterprises and shall ensure that subcontractors and vendors comply with this policy. Failure of subcontractors and vendors to comply with this policy statement shall jeopardize initial, continued, or renewed funds.

Our commitment is intended to promote equal opportunity in all employment practices and provide a positive program of affirmative action for the City of Missoula, its employees, program participants, trainees and applicants.

10. Default and Termination: If either party fails to comply with any condition of this agreement at the time or in the manner provided for, the other party, at its option, may terminate this agreement and be released from all obligations if the default is not cured within ten (10) days after written notice is provided to the defaulting party. Said notice shall set forth the items to be cured. Additionally, the non-defaulting party may bring suit for damages, specific performance, and any other remedy provided by law. These remedies are cumulative and not exclusive. Use of one remedy does not preclude use of the others. Notices shall be provided in writing and hand-delivered or mailed to the parties at the addresses set forth in the first paragraph of this agreement.

11. Modification and Assignability: This document contains the entire agreement between the parties and no statements, promises or inducements made by either party or agents of either party, which are not contained in this written agreement, may be considered valid or binding. This agreement may not be enlarged, modified or altered except by written amendment signed by both parties hereto. The Consultant may not subcontract or assign Consultant’s rights, including the right to compensation or

duties arising under this agreement, without the prior written consent of City. Any subcontractor or assignee will be bound by all of the terms and conditions of this agreement.

12. Ownership and Publication of Materials: All reports, information, data, and other materials prepared by the Consultant pursuant to this agreement are the property of the City. The City has the exclusive and unrestricted authority to release, publish or otherwise use, in whole or part, information relating thereto. Any re-use without written verification or adaptation by the Consultant for the specific purpose intended will be at the City's sole risk and without liability or legal exposure to the Consultant. No material produced in whole or in part under this agreement may be copyrighted or patented in the United States or in any other country without the prior written approval of the City.

13. Liaison: designated liaison with Contractor is _____, and Contractor's designated liaison with City is _____.

14. Previous Agreements: This Agreement constitutes the entire understanding of the parties and is intended as a final expression of their agreement and a complete statement of the terms thereof. There are no promises, terms, conditions, or obligations, other than contained herein. This Agreement shall supersede all previous communications, representations, or agreements, either oral or written, between the parties.

15. Applicability: This agreement and any extensions of it shall be governed and construed in accordance with the laws of the State of Montana.

WITNESS, the parties here have executed this instrument the day and year first above written.

CONSULTANT:

ATTEST:

Martha L. Rehbein, CMC, City Clerk

MAYOR

City of Missoula, Montana

John Engen

APPROVED AS TO FORM:

Jim Nugent, City Attorney

CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

through

DEVELOPMENT OF A UNIFIED DEVELOPMENT CODE

Consultant Contract

Exhibit D: Original Consultant Proposal



RESPONSE TO REQUEST FOR PROPOSAL FOR :

THE CITY OF MISSOULA

COMPREHENSIVE CODE REFORM

THROUGH A UNIFIED DEVELOPMENT CODE

PREPARED BY:

SAMANTHA SUTER, *Metta Urban Design*

PETER J. PARK, *Peter J. Park LLC*

JAMIN KIMMELL, *Cascadia Partners*

METTAURBANDESIGN

Peter J. Park
City Planning and Design



SUPPORTED BY:

Alex Steinberger, Cascadia Partners

Irene Kim, Cascadia Partners

Robert Liberty, Cascadia Partners

Future West

Six Pony Hitch Creative

Rachel Cain, More Sky Less Ceiling

Phoebe Loyd, Metta Urban Design

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APPENDIX B: ADDITIONAL PROJECTS



1. LETTER OF INTENT

January 20, 2021

Community Planning, Development & Innovation

ATTN: Benjamin Brewer

brewerb@ci.missoula.mt.us

RE: Request for Proposals for Comprehensive Code Reform for the City of Missoula

Dear Mr. Brewer and Selection Committee,

On behalf of **Metta Urban Design (MUD)**, **Peter J. Park City Planning and Design**, and **Cascadia Partners**, I am pleased to present you with a response to the Request for Proposals: Comprehensive Code Reform Through Development of a Unified Development Code for the City of Missoula.

On the following pages, you will see information about this team and approach. First, I want to highlight a few unique aspects of our team and approach.

1. **We've stood in your shoes** – our principals have extensive public and private sector experience and we understand what it takes to craft and implement new development code systems. We know how to effectively engage those responsible for amending the code, interpreting it at the counter, enforcing it in field, and providing legal guidance so you can build strong staff competence and ownership in the new UDC.
2. **We are a collaborative of small firms with local and national experience** thoughtfully curated for Missoula around a shared commitment to auditing and crafting codes that address the natural environment, the local culture and building traditions, and your pressing housing needs in the broader context of Missoula County and the surrounding region.
3. **We bring a fresh perspective to our work with proven success delivering innovative, equity-informed code updates.** We've worked in communities of all scales dealing with housing affordability challenges. Our data-driven approach and visualization techniques will provide you with informative, effective, and fun tools for engaging your community in productive conversations.
4. **What you see is what you get with us!** We're not a big firm organized around layers of hierarchy; we're a small, energetic, and nimble collective with unmatched skills and experience eager to jump in and help round out your team.

Our proposal follows the requirements and organization stated in the RFP. If you have any questions about this proposal, or would like any additional information, **please do not hesitate to reach out to me at 650-892-9143 or samantha@mettaurbandesign.com**.

Thank you very much for your consideration, and I look forward to hearing from you regarding your selection.

Respectfully,



Samantha Suter, Owner of Metta Urban Design

1. LETTER OF INTENT

PROJECT UNDERSTANDING

Each community is different and there is no one-size-fits-all approach to development codes. We start with listening to your community, in-depth reading of your development regulations, and deep analysis of the existing built form of your community. Understanding your planning and development culture is necessary for us to tailor a code strategy appropriate to your resources, capacities, and current and future needs. Our broad public and private sector experience provide us with unique insights on how to thoroughly understand the factors that have shaped Missoula's development regulations and approval processes. Our work at the forefront of innovation in development codes is differentiated in the way we combine market data analysis, visualization techniques, and public engagement in ways that foster trust and productive community conversations. Our process simultaneously offers thorough assessment of code performance at the intersection equity, affordability, design, and environmental quality concerns.

We understand the Missoula City Growth Policy directive to "focus inward" is a critical foundation point for the work and we are extremely excited to work with a community committed to such a bold vision for guiding truly sustainable urban growth. The City Strategic Framework and recent Subdivision and TED Regulations report provide useful guidance for creating shared utility, transportation, and green infrastructure design standards;

consolidating development regulations in a new UDC to improve consistency, clarity, and predictability; and better aligning the new UDC with adopted policies - especially those related to housing and equity. We understand that Missoula now seeks an audit of applicable development regulations and review practices and procedures to craft improvements that promote and/or incentivize the creation of affordable and workforce housing. A new UDC guided by policies in "A Place to Call Home" and informed by Missoula County's recent Housing Action Plan provide significant opportunities for positioning Missoula to better meet its housing needs and leverage potential future affordable housing funding initiatives.

We understand that Missoula's next phase of evolution focuses on compatible infill development and adequate and affordable housing that prudently utilizes existing infrastructure. We will provide effective strategies for leveraging affordable housing, providing greater housing diversity, and creating walkable mixed-use development. We will listen to the community, analyze the physical form and character, learn from your past successes, and provide recommendations rooted in the social and economic realities of Missoula. We will create feasible code and review process mechanisms that prioritize and incentivize projects that meet clearly defined affordability criteria and help you better align the new UDC with your adopted plans and policies.

POLICIES AND FOUNDATION



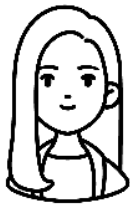
TEAM ORGANIZATION



CITY STAFF

We will work as one, integrated team with the City staff playing a key role in the project, so we've organized our team to be an extension of City staff. This is consistent with the details in the RFP and is our preferred approach to team organization. Close coordination with staff is key to the long term success of the project since staff will be responsible for applying the updated code.

PROJECT MANAGEMENT TEAM (PMT):



Samantha Suter
Project Manager

METTAURBANDESIGN



Peter Park
Principal-in-Charge

Peter J. Park
City Planning and Design



Jamin Kimmell
Community Engagement
Modeling & Analysis



The PMT will consist of **Peter Park (PJP)** who will be the Principal-in-Charge and **Samantha Suter (Metta Urban Design)** who will be the Project Manager and contract holder. **Jamin Kimmell (Cascadia Partners)**, and his team will lead the economic modeling and analysis aspect of the project and support the community engagement. Even though we have separate business entities, Peter, Jamin, and Samantha have a long standing working relationship and collaborate on a regular basis.

ADDITIONAL RESOURCES:

CASCADIA SUPPORT SERVICES

Alex Steinberger (Managing Partner)
Robert Liberty (Strategic Partner)
Irene Kim (Partner)

Community Engagement
Economic and Spatial Analysis
Growth Management Policy

MUD PRODUCTION SERVICES

Samantha Suter
Phoebe Loyd
Character Analysis
Document Templates
Sketchup Modeling
Building Form Testing
Visualizations

ADDITIONAL EXPERTISE

Peter Park
Executive Advising
Review Process

ADDITIONAL SUPPORT BY:

LOCAL ENGAGEMENT & OUTREACH SPECIALIST

Six Pony Hitch
Spider McKnight

Travis Wilson
Community Engagement
Branding & Communications



CODE ADVISING

Future West

Randy Carpenter

Montana State and Local Land Use Policy
Growth Management and Conservation Policy



ONLINE COMMUNITY ENGAGEMENT

More Sky Less Ceiling

Rachel Cain

Digital Community Engagement Management



MORE SKY LESS CEILING

2. STRUCTURE & PERSONNEL

Our carefully curated team brings unmatched technical expertise necessary for a successful Comprehensive Code Reform for the City of Missoula. Highlights of each firm, key personnel qualifications and experience are summarized on the following pages.

FIRMS - Project Management Team (PMT)

Metta Urban Design LLC (MUD) is a boutique, woman-owned design firm specializing in implementation-ready, community-oriented planning, urban design and landscape architecture. Our work focuses on building strong communities through innovative yet implementable solutions, and our experience includes illustrating form-based codes, comprehensive plans, and other technical reports and studies; facilitating community and stakeholder engagement; crafting design standards and guidelines; and developing a wide range of plans, including small area plans, street typologies and multimodal studies, signage and wayfinding plans, public art programs and installations, streetscape design, urban forestry standards, green infrastructure policy, and park master plans.

METTAURBANDESIGN

Details about ownership: Single Member LLC.

Firm Size: 1 person

Metta Urban Design is a certified Disadvantaged Business Enterprise by the Colorado Department of Transportation and is a certified Woman-Owned Business (W/MBE), certified Small Business (SBE), and certified Emerging Business (EBE) by the City and County of Denver.

Number of years in business: 2.5 years

Peter J. Park, LLC, is a city planning and design firm based in Denver, Colorado that provides innovative strategies for balancing development needs with unique community and design quality concerns. The firm is led by Peter Park and provides specialized advisory services that draw upon his unique insights gained while serving as planning director of two large US cities and his more than 25 years experience in both professional practice and academic settings. His integrated approach to comprehensive planning, urban design, and development review has created clear visions for sustainable urban development, places of high quality design, and streamlined permitting systems.

Peter J. Park City Planning and Design

Details about ownership: single member LLC.

Firm size: 1 person

Number of years in business: 7.5 years

Cascadia Partners is a multidisciplinary consulting firm with expertise in planning, housing policy, urban design, real estate finance, project management, and engagement. Our team's experience in many facets of planning and development means we are able to guide projects from concept to reality. Our strength is our ability to provide both sophisticated analysis and a compelling, visual story that inspires stakeholders and brings concepts to life. We help public agencies make strategic decisions rooted in sound data analysis, modeling, and design. We bring a pragmatic and implementation-focused approach to zoning and land use policy, building on our staff of seasoned housing policy experts and real estate professionals.



Details about ownership: Cascadia Partners is a limited liability company (LLC) in the state of Oregon with active Small Business Enterprise (SBE) certification. The firm has four managing partners: Alex Joyce, Alex Steinberger, Irene Kim, and Jamin Kimmell.

Size of firm: 13 employees with 4 strategic partners that are commonly engaged on a contract basis.

Number of years in business: 4 years

KEY PERSONNEL - Project Management Team (PMT)



SAMANTHA SUTER

Owner, Metta Urban Design

Proposed Roles:

Project Manager
Code Illustrations Lead
Code Reorganization

Samantha Suter (MUD) will be the Project Manager and contract holder. Samantha will lead the urban design, building form testing, and visualizations for the team. She will work closely with Cascadia, who's data modeling tool provides exports directly into sketchup. Samantha will also lead the code reorganization aspects of the project, ensuring that the updated code is user friendly, streamlined, and reflective of best practices for modern codes.

METTAURBANDESIGN

EXPERIENCE: Samantha has a wide range of planning experience working with a variety of clients including large cities, metropolitan regions, suburban towns, and resort communities. She has managed some of the most high-profile planning projects in the Denver Metropolitan Region, including the Far Northeast Area Plan, the National Western Center Design Standards and Zoning Update, and the Lone Tree City Center Station Area Plan. She is a detailed-oriented, highly organized project manager. Samantha's most valuable skillset is her sophisticated "graphic storytelling" ability. Her work is known for effective project illustrations, an engaging and easy to understand visual identity, and her commitment to equitable, meaningful stakeholder engagement.

AVAILABILITY: 30%

SAMANTHA SUTER | 650.892.9143 | samantha@mettaurbandesign.com | 191 University Blvd #678 Denver, CO 80206



PETER PARK

Owner, Peter J. Park LLC

Proposed Roles:

Principal-in-Charge
Code Reorganization Lead
Executive Advising

Peter Park (PJP) will serve as the Principal-in -Charge and will also play a key role in the code reorganization, as he has led several code rewrites throughout the country and he can navigate the project around potential issues and set up a smooth adoption and implementation process. Peter will also be the Code Philosophy expert. He will ask the big questions and guide the project in a strategic direction. He past experience will enable the team to be bold and innovative in our approach, while understanding how we can successfully implement this bold approach to the update.

Peter J. Park
City Planning and Design

EXPERIENCE: Since its establishment in 2013, Peter has served a variety of public, private, and non-government organizations in various cities including Houston, Los Angeles, Austin, Oklahoma City, Memphis, Milwaukee, Denver, Mexico City, and Chennai. Projects include citywide zoning code updates; comprehensive citywide, district, corridor, and neighborhood planning initiatives; and strategic executive leadership advising on city planning capacity and organizational change management.

AVAILABILITY: 20%

PETER PARK | 303.378.4810 | peter@peterpark-planning.com | 4111 East 18th Ave Denver CO 80220

2. STRUCTURE & PERSONNEL



KEY PERSONNEL - Project Management Team (PMT) cont.



JAMIN KIMMELL

Partner, Cascadia Partners

Proposed Roles:
Modeling & Analysis Lead

Jamin Kimmell will lead the work of the Cascadia Partners team. Cascadia will lead the community engagement strategy and will provide economic and spatial analysis. Jamin will guide the technical analysis so that it is tailored to the needs of the project and provides key information needed to make informed, data-driven decisions. He will also help to translate this technical analysis into stories and messages that are clear and relatable for community members. He will ensure that technical work is synced up to the broader community engagement and decision-making process.

EXPERIENCE: Jamin is a land use planner and code specialist who focuses on crafting context-sensitive, market-feasible development regulations that help create more affordable and equitable communities. Jamin has six years of experience working across many facets of land use planning, housing policy, and development. He has experience managing and contributing to complete zoning code rewrites, housing policy plans, corridor plans, urban design studies, and development permitting.

Jamin has led or contributed to dozens of zoning code audit and update projects, the majority focused on addressing housing affordability issues. He played a key role in six major code rewrites in the last five years in Oregon and Colorado as both an analyst and code writer. He has also represented private clients in navigating the permitting process. He is adept at analyzing a zoning code from multiple perspectives and crafting new approaches that balance competing priorities.

AVAILABILITY: 25%

612.940.9087 | jamin@cascadia-partners.com | 519 SW Park Ave. Suite 215, Portland, OR 97205

KEY PERSONNEL - Technical Team & Advisors



ALEX STEINBERGER

*Managing Partner,
Cascadia Partners*

**Spatial Analysis &
Scenario Modeling**

Alex Steinberger will serve as Spatial Analysis and Scenario Modeling Lead. Alex is Managing Partner and is an urban planner and economist with a strong foundation in geographic information systems. His experience includes scenario planning, corridor analysis, housing and economic development.

971.808.2366 | steiny@cascadia-partners.com | 519 SW Park Ave. Suite 215, Portland, OR 97205



ROBERT LIBERTY

*Strategic Partner,
Cascadia Partners*

Policy Advising

Robert Liberty will function as a key advisor on growth management and housing policy. Robert is a land use attorney with experience in the implementation, refinement and evaluation of the state, regional and local comprehensive plans. His experience as an elected official, a county land use hearings officer, a planning consultant and attorney in private practice and public entities supports the code reform through policy expertise.

503.313.9567 | robert@cascadia-partners.com | 519 SW Park Ave. Suite 215, Portland, OR 97205



IRENE KIM

Partner, Cascadia Partners

Community Engagement Lead

Irene Kim is an urban planner specializing in public and culturally-specific engagement and visual communications on a broad range of projects with public agencies and non-profits including site-specific redevelopment, corridor planning, housing, parks, active transportation, and regional visioning efforts.

503.459.7023 | irene@cascadia-partners.com | 519 SW Park Ave. Suite 215, Portland, OR 97205

See Appendix 1 for more detailed team qualifications including resumes of specific individuals.

KEY PERSONNEL - Technical Team & Advisors cont.



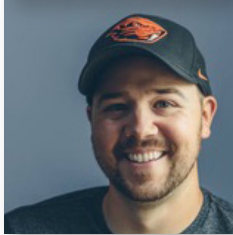
SPIDER MCKNIGHT

Owner, Six Pony Hitch

**Branding Strategy
Creative Direction**

Spider Mcknight and Six Pony Hitch will assist Cascadia Partners in Community Engagement for this project. Spider facilitates meaningful and lasting results by helping organizations find and use their unique voices. With her ability to see around corners and build strong scaffolding, she helps organizations power change with their communities.

SPIDER MCKNIGHT | 406.924.1111 | spider@sixponyhitch.com



TRAVIS WILSON

Lead Designer, Six Pony Hitch

Graphic Design

Travis Wilson will lead the graphic design support for Six Pony Hitch. He is a brand strategist and senior graphic designer specializing in identity, packaging, website, and environmental design. He brought his insightful design approach to Six Pony Hitch in 2013 and has been a foundational member of the company.



SIX PONY HITCH is a strategic communications agency offering years of experience in strategy, content creation, graphic design, web design and development, relationship management, and community building for organizations looking to be change-leaders in their industry and/or community. We believe that the best planning and vision work begins with the art of listening, and we design all our work to account for the many voices that must be heard for real and lasting change. Six Pony Hitch harnesses the power of strategic thinking, smart design, and strong narrative to help you make deep, lasting connections with the people that matter most to your organization.



RANDY CARPENTER

*Community Planning,
FutureWest*

State & Local Land Use Expert

Randy Carpenter of FutureWest will provide expert review and guidance on state and local land use laws and practices in Montana. Randy has over two decades of experience working with local governments on planning and growth management processes across Montana and the Northern Rockies. He will bring insights into regional best practices, market dynamics from similar communities, and local knowledge of Missoula's planning and growth challenges.

406.582.8937 | randy@future-west.org | 321 E Main St. Suite 322 Bozeman MT, 59771



FUTURE WEST, a Bozeman-based nonprofit with decades of experience in helping communities in the West deal with growth and change, Future West works to realize a future where communities have a shared sense of place, robust economies, and sound stewardship of natural, cultural, and community assets. We help communities identify, choose, and achieve their desired future by providing the technical assistance, community organizing, process facilitation, and partnerships needed to ensure that as the region grows, its communities thrive.



RACHEL CAIN

Owner, More Sky Less Ceiling

**Online Community
Engagement**

Rachel Cain at More Sky Less Ceiling will manage online community education and engagement efforts to ensure that the public understands the scope and impact of the decisions that are being proposed and can respond in-kind. Rachel has been successful support to Metta Urban Design in past online community engagement projects for Housing Element campaigns in California.

720.641.6591 | RachelJCain@gmail.com



MORE SKY LESS CEILING

MORE SKY LESS CEILING is passionately defining success without boundaries. By working collaboratively, the sky is not the limit, the sky is the starting place. Principal and Founder, Rachel Cain, has dedicated her life to supporting projects which define success by elevating the quality of the human experience. Projects are approached with an open mind and spirit of learning.



PHOEBE LOYD

Independent Contractor

MUD Production Support

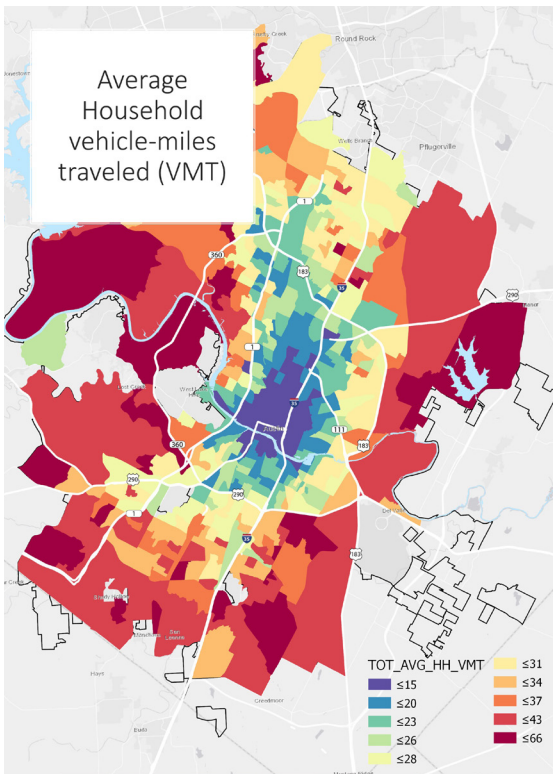
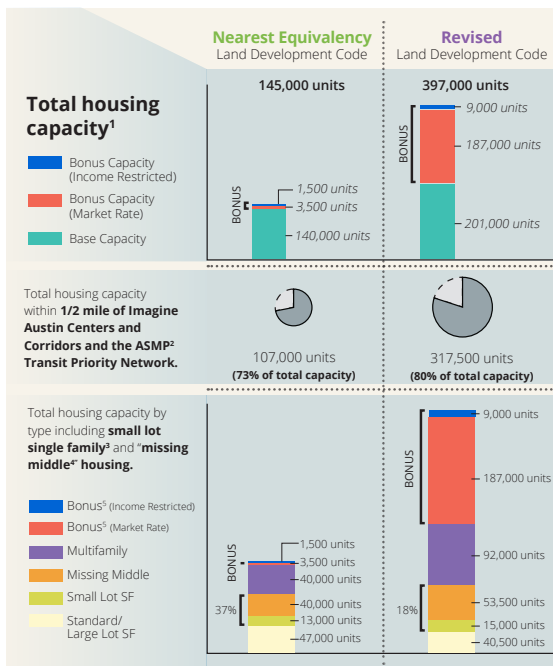
Phoebe Loyd is a professional graphic designer, and recent dual graduate of Landscape Architecture and Urban and Regional Planning. Phoebe will assist Metta Urban Design in graphic production services for project assets. Phoebe has been an independent contractor of MUD for multiple projects over 1.5 years.

970.987.2143 | phoebe@mettaurbandesign.com

3. EXPERIENCE

Our experienced team will work collaboratively bringing an integrated approach from our various backgrounds of expertise. Our proposed team for this project has worked on many successful projects and citywide code updates together throughout the years (as shown below). The following pages go into detail of the first three projects on this list which provide the most relevant projects in support of this proposal.

PROJECT <i>*Additional project information and details can be found in Appendix 2 : Project Examples</i>	CLIENT	YEAR	Peter Park	Samantha Suter	Jamin Kimmell	Alex Steinberger	Spider McKnight	Rachel Cain
Austin Land Development Code Update, 2nd Reading Draft Code and Map	City of Austin, TX	2020	X		X	X		
Fort Collins Land Use Code Update	City of Fort Collins, CO	2021	X	X	X	X		
Denver Citywide Zoning Code	City of Denver, CO	2020	X	X				
Missoula Downtown Master Plan	City of Missoula, MT	2020			X	X	X	
Housing Element Campaigns	Multiple Cities, CA	2020		X				X
Park City Affordable Housing Code Incentives Audit	City of Park City, UT	2020			X			
Golden Code Audit and Rewrite	City of Golden, CO	2021	X	X				
Architectural Standards for Single Family Duplex	City of Issaquah, WA	2021		X				
Milwaukie Cottage Cluster Code Audit	City of Milwaukie, OR	2020				X		
Far Northeast Area Plan	City and County of Denver, CO	2019	X	X				
Gunnison Code Diagnosis	City of Gunnison, CO	2018				X		
Blueprint Denver Update	City and County of Denver, CO	2019	X	X				
La Grande Housing Production Strategy	City of La Grande, OR	2021			X			
Riverfront Mixed-Use Zoning District	Canon City, CO	2019		X				
Main Streets on Halsey Code Update	Cities of Troutdale, Fairview, and Wood Village, OR	2021			X			
Lander Housing Affordability Code Audit and Update	City of Lander, WY	2020			X			
Lake Oswego Middle Housing Code Audit and Neighborhood Character Study	City of Lake Oswego, OR	2021			X			
Laramie Housing Affordability Code Audit	City of Laramie, WY	2020			X	X		
Aligning Zoning Code With Housing Goals: A Toolkit For Wyoming Communities	Wyoming Department of Commerce	2020			X			



REFERENCE - AUSTIN

Annick Beaudet, AICP, Assistant Director
Austin Transportation Department
512.974.7959
Annick.Beaudet@austintexas.gov

Key Project Staff: Peter Park (Peter J Park LLC),
Alex Steinberger (Project Manager, Cascadia)
Jamin Kimmell (Code Analyst, Cascadia)

Austin Land Development Code Update

Peter J. Park, LLC and Cascadia Partners collaborated on the Austin LDC update. Since 2013, Peter has played a key role in the project, a key implementation program of Imagine Austin, the City's comprehensive plan. Peter originally served as a subconsultant to Opticos, and now he continues to advise the Office of the City Manager and staff on completing the code revision, implementation strategies, and organizational capacities for code administration. To ensure successful implementation of the revised land development code, Peter is advising on next level comprehensive and small area planning.

Cascadia Partners was retained by the City of Austin to perform detailed analysis of the proposed land development code. This analysis involved the use of Envision Tomorrow, a land use scenario model that allows planners to assess the impacts of policy proposals.

Equity Approach: Using Envision Tomorrow, Cascadia Partners was able to estimate the market-feasible capacity of new housing units, both market-rate and affordable. In addition, Cascadia's sophisticated modeling tool allowed for rapid assessment of land use change across a range of metrics including transportation, housing cost, and environmental impacts. Cascadia Partners packaged this analysis into an engaging "report card" that was used to communicate complex analysis to elected officials and the general public. Cascadia applied an equity lens to this work by helping the City to make data-driven decisions to set affordability code incentives, quantify the capacity for income-restricted affordable housing capacity within Areas of High Opportunity, and other measures of housing capacity around key community assets.



Housing diversity across the city:

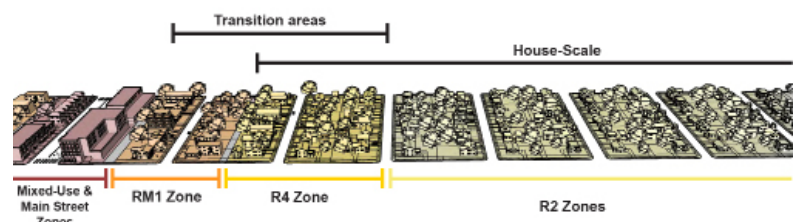
Council directed that "new code should prioritize all types of homes for all kinds of people in all parts of town." The proposed code achieves this in the following ways:

- Allow two units (ADU's and duplexes) in existing house scale residential in the R2 zones that comprise nearly a quarter of the City
- Provide Transition Areas along corridors which allow for more housing options such as townhomes, multiplexes, and small apartment buildings
- Make housing capacity along corridors through reduced impact of compatibility standards
- Make income-restricted affordable through bonus incentives in more places across the city

Transition Areas:

Council directed to "map new missing middle housing in transition areas adjacent to activity centers, activity corridors, or the transit priority network." In addition to providing for more housing options and capacity, Transition Areas provide progressions in height and scale from more intense mixed-use development along corridors to house-scale residential areas. These areas are mapped within less than a 5-minute walk from the corridors which contribute to the Council goal of "5050 Transportation Mode share by 2030." Transition areas are comprised of the following two zones:

- RM1: The larger scale transition zone (comprise 1% of all zones that allow residential use and 20% of the Transition Areas in the October 4th map)
- R4: The smaller house-scale transition zone (comprise 3% of all zones that allow residential use, and 72% of the Transition Areas in the October 4th map)



3. EXPERIENCE

STATISTICS

Fort Collins, CO

Population: 169,810

Size: 58.47 mi²

REFERENCE - FORT COLLINS

Caryn Champine, Department Head of Planning, Development, and Transportation (formerly with City and County of Denver)

970-221-6765

cchampine@fcgov.com

Key Project Staff: Peter Park, Metta Urban Design, Cascadia Partners

Fort Collins Land Use Code Update

Metta Urban Design, Peter J. Park Planning, and Cascadia Partners are currently leading Phase I of the Fort Collins Land Use Code Update, which is addressing housing related issues and code organization. Equity, housing affordability, and housing options are a central focus of the code update.

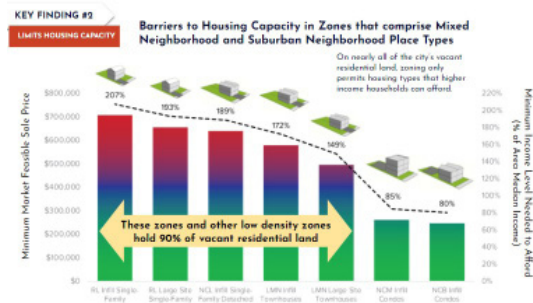
The project is led by Metta Urban Design and Peter Park Planning. Cascadia Partners is currently playing a key role in the modeling and economic analysis for the fast-growing and dynamic community. Cascadia's urban analytics and development feasibility modeling have shaped the proposed approach to the code update. The firm produced the following analyses to date:

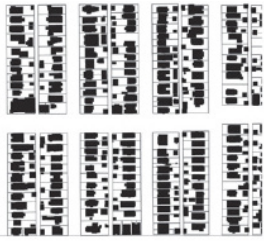
Neighborhood Gentrification Typology: Cascadia used best practice methods from academic research to measure how vulnerable the population of each census tract is to residential displacement due to rising housing prices. The analysis also categorizes each census tract by stage of gentrification.

Access to Opportunity Indices: Using a variety of data sources, Cascadia created a series of four indices that measure access to opportunity across the city. The indices measure access to opportunity on four dimensions: economic, mobility/ accessibility, education, and environment/health.

Housing Affordability Modeling: Cascadia applied real estate pro-forma analysis to model the potential affordability of housing in each zone district under current use regulations and development standards. The analysis identifies key regulations that are barriers to deeper affordability or lower cost housing types.

These three analyses were well-received by the City Council and are currently shaping the team's approach to the code update, which will include major amendments to use regulations and development standards in many residential zones, new incentives for income-restricted affordable housing, crafting new zone districts, and remapping existing zones in key locations.





Urban (U) Neighborhood Context Zone Districts	Max Number of Primary Structures per Zone Lot	Building Forms											
		Suburban House	Urban House	Duplex	Townhouse	Townhouse	Garden Court	Row House	Apartment	Office/Thru Services	Drive Thru Restaurant	General	Special
RESIDENTIAL ZONE DISTRICTS													
Single Unit (SU)	U-SU-A, -B, -C, -E, -H	1*	■										
	U-SU-A1, B1, C1, E1, H1	1*	■										
Town Unit (TU)	U-TU-A2, B2, C2	1*	■	□	□								
	U-TU-B, -C	1*	■	■	■			□					
	U-TU-B2	1*	■	■	■			□					
Rowhouse (RH)	U-RH-2,5	no max	■	■	■			■					
	U-RH-3A	no max	■	■	■			■	■	□			
COMMERCIAL MIXED USE ZONE DISTRICTS													
Residential Mixed Use (RM)	U-RM-3, -5	no max											■
Mixed Use (MX)	U-MX-2x	no max											■
	U-MX-2, -3	no max											■
	U-MX-2x	no max								■	■		■
Main Street (MS)	U-MS-2x	no max											■
	U-MS-2, -3, -5	no max									■	■	■

■ = Allowed □ = Allowed subject to limitations *See Section 1.2.3.5 for exceptions



REFERENCE - DENVER

Caryn Champine, Department Head of
Planning, Development, and Transportation
(formerly with City and County of Denver)
970-221-6765
cchampine@fcgov.com

Key Project Staff: Peter Park and Samantha Suter

Denver Citywide Zoning Code

Peter Park led the first comprehensive update to the Denver Zoning Code and Map in more than 50 years. The 2010 Denver Zoning Code implements Blueprint Denver, the city's integrated land use and transportation plan and uses a **context and form-based approach**. A code diagnostic was prepared that included detailed analysis of code issues in "Areas of Stability and "Areas of Change," code format, and code amendment and review processes. A comprehensive analysis/inventory of Denver's development patterns was prepared and served as the basis of the six Neighborhood Contexts that organize the code. The code was unanimously adopted by the Denver City Council on June 21, 2010 and became effective just four days later on June 25, 2010 – a **testament to the strength of community support for and staff's readiness to implement a new and improved system**. The new code provides **greater predictability** and has significantly reduced Denver's heavy dependence on custom, site-specific rezonings that were typically highly negotiated, time-consuming, and costly.

Samantha Suter, while working for the City and County of Denver, worked on the first major zoning amendments, including design and calibration of specific standards. She was the primary urban designer on the first major zoning amendments, including leading the testing and calibration of building form standards for Cherry Creek and Arapahoe Square.

Equity Approach: Reduced context-based minimum lot sizes legalized thousands of previously non-conforming houses in Denver's older neighborhoods often home to poorer minority residents and allowed smaller houses on smaller lots. Introduced first generation of Two-unit, Rowhouse, and Townhouse Missing Middle zones. Introduced first generation single-unit zones that allow Accessory Dwelling Units (ADU's). Reduced parking requirements overall and especially along transit corridors and for small commercial lots to encourage re-use and preservation of older main street buildings.

4. APPROACH

The following pages contain our team’s proposed approach for the Comprehensive Code Reform. If awarded the contract, we expect to use this scope and project details as the starting point for contract negotiations.

OVERVIEW

The draft scope included in the RFP provides an impressively thorough outline of tasks and timeline structure. It’s clear that past work such as the City Strategic Framework and the recent Subdivision and TED Regulations report have made a strong case and guidance for creating a new Unified Development Code and we are fully prepared to work with you using the approach as described in the RFP. However, after reviewing the materials, we believe there are opportunities for adjusting the sequence of the tasks to better coordinate public engagement; better integrate various scenario analysis, code innovation opportunities, and policy decisions; and potentially have a new UDC in a shorter timeframe. Interested?

In a nutshell, here’s what we suggest:

- 1. Instead of having Task 2 UDC Baseline Regulations go through the entire adoption and collateral material production/training process, **we suggest shortening Task 2 to be a Code Organization and Process Audit**. We also propose starting Task 2 as soon as possible.
- 2. Task 3 Community Innovation Audit and Task 4 Growth Policy Update would start as proposed in the RFP draft scope however, **we suggest that our team working closely with the staff as they engage**

the community in Task 4 so policy discussions and decisions can be informed by our analysis of how the development regulations and processes impact a variety of policy-related concerns such as equity, housing capacity, affordability, compatibility, transportation, and environment.

- 3. **Better integration of Task 3 and Task 4** will allow us to work more efficiently and effectively with the community so that we can shorten the transition between Task 4 and Task 5 proposed in the RFP draft scope and start drafting the new UDC sooner with fresh direction from updated growth policies.
- 4. Building on the momentum of the previous integrated tasks, **Task 5 UDC Innovation Update would incorporate organizational and process improvements** identified in Task 1 with newly formatted, graphically-rich, and easier to use development standards.

We believe this slightly different approach will make more effective use of everyone’s time (especially with regard to community engagement) and potentially allow for the UDC to be in place sooner.

PROJECT TIMELINE & MILESTONES

Missoula Comprehensive Code Reform Schedule	RFP Suggested Timeline:											
	FY 2022				FY 2023				FY 2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1: Project Start-Up												
Task 2: Process and Organization Audit												
Task 3: Community Innovation Audit												
Task 4: Growth Policy Update			*	*	*	*						
Task 5: Unified Development Code												
Task 6: Follow Through												

*Work By Community Planning Staff

Missoula Comprehensive Code Reform Schedule	Potential Alternative Timeline:											
	FY 2022				FY 2023				FY 2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1: Project Start-Up												
Task 2: Process and Organization Audit												
Task 3: Community Innovation Audit												
Task 4: Growth Policy Update			*	*	*	*						
Task 5: Unified Development Code												
Task 6: Follow Through												

TASK 1 : PROJECT START-UP

1.1: Final Scope of Work and Schedule. As part of Project Start-Up, our team will work with City staff to finalize the project scope, schedule, and deliverables. Our team is specifically composed and organized to extend the City's capacities and enhance your technical expertise. Our deep public and private sector experience has shown this to be the ideal team relationship and is our preferred way of assisting our clients. You are most expert in the regulatory culture of Missoula and it's important that our collective work starts from your local knowledge. This collaborative structure is also essential to building staff competence and sense of ownership in proposed code changes as well as gaining public confidence and support as the project proceeds. As such, our process will be iterative with staff, and we will work with you as one integrated team.

1.2: Background Document Review. We will work with staff to determine what background documents are most relevant to this project, and we will review these documents to become familiar with recent City plans and policies. We expect the initial review to include materials related to ongoing efforts, such as the Transportation Options Action Plan, the Missoula Affordable Housing Incentives Analysis, the Midtown Master Plan, and edits to Title 12.

1.3: Community Engagement Plan. Our past experience has proven that a project of this magnitude requires broad community support. As such, community engagement is a critical component of the ultimate success of Comprehensive Code Reform, and we curated this team with engagement specific to Missoula, Montana in mind. At our core, we are a team of subject matter experts who can simply and effectively distill technical planning concepts into a narrative that is understandable to a wide range of audiences. We understand the local nuances of Missoula and the dynamics of planning state and region-wide. And, we are fluent in digital communication.

Our primary objective is to ensure meaningful, equitable engagement, which we define as engaging the right group at the right time with the right technique. To ensure meaningful, equitable engagement, we incorporate the following guiding principles into our engagement plans.

- **Transparent and respectful** - We will keep meetings as concise as possible, understanding that too many meetings that are too long will contribute to project "burnout." We will clearly explain to those who participate how their input will inform subsequent project work; it is important to be

clear and transparent on how their input will be used and what the next steps of the process (and their potential involvement) will be. We will also establish clear "rules of engagement" to ensure a respectful dialogue even in the face of opposing thoughts.

- **Thoughtful and deliberate** - From project branding to key messaging, we will ensure all public facing material helps to cultivate stakeholder interest, excitement, and understanding and is culturally relevant, avoiding jargon, metaphor, or euphemisms that might not be easily understood, especially when translated into languages other than English. Our goal is to create a strong project brand that builds community trust and support throughout the process. We will establish a set of clear and relevant key messages that addresses the "who, what, where" of the project, and we will engage "project ambassadors" who are trusted by and connected to a network of community members who will help endorse and amplify project information and calls-to-action. We will tap into channels that are familiar to particular communities by partnering with community "gatekeepers"—such as schools, places of worship, and community organizations.
- **Adaptable** - We've found that no matter how thoughtful a plan is, unexpected circumstances are bound to happen and meaningful engagement requires a dynamic, responsive approach. As such, we encourage clients to adopt a dynamic process to engagement, and we will ensure that after each milestone, the entire project team assesses our engagement, and determines any adjustments we can make in order to better reach our goals. These checkpoints, and when necessary corrections, are crucial to ensuring a successful outcome.

Developing a Community Engagement Plan is a collaborative effort requiring participation from all project partners and considering the ultimate engagement needs of a wide audience. Our team will develop an engagement plan with input from the City's Community Engagement Specialist. SixPonyHitch will provide guidance based on their local understanding of successful engagement in Missoula, and More Sky Less Ceiling will provide guidance as to how best to leverage virtual engagement. FutureWest will ensure we are considering the state and regional planning perspective

The Community Engagement Plan will include the following elements:

- **Schedule and milestones** - We will plan community engagement events at key points in the project so that the feedback we receive actually informs the project work. This is critical to ensure engagement is meaningful and not merely “checking the box.” We will work closely with City staff to determine the specific activities and timeline to add the most value to the project, and we have budgeted seven cycles of engagement, as described in the scope below.
- **Target audiences** - We will work with City staff to finalize the list of audiences we aim to reach as part of the Comprehensive Code Update, and we will plan specific engagement activities to reach each audience at the relevant project milestone. We expect the target audiences to include the following.
 - **Community** - wide range of participants. Engagement includes virtual workshops, surveys, media campaigns, and info sessions, and are often meant to spread broad community awareness and understanding of the project and to gauge the pulse of the community at large.
 - **City staff** - including the Project Manager, the City Engagement Specialist, Executive Leadership Team, City Core Group, Innovation Functional Work Team, and Communication Team.
 - **Boards and Decision-Making Bodies** - City Council, Planning Board, and potentially the Design Review Board, Board of Adjustment and Historic Preservation Commission.
 - **Frequent Code Users** - developers, architects, housing advocates, real estate professionals, etc. who are familiar with the code and have gone through the review process.
 - **Community Leader Model** - Our team will identify, recruit, and organize the work of 8-15 community leaders that will act as liaisons for the project. Community leaders will be organized under a charter, meet regularly throughout the process with the project team, and directly implement and promote engagement activities. We recommend the community leaders be paid a stipend as a token of appreciation for their time and investment, and we have incorporated this into our project budget.
 - **Strategic partners** - Community-based outreach partners.
- **Project branding and Project Branding and Communications** - Our team provides professionally-designed, custom-made branding and style guides for projects that are compelling and easily recognizable. Our team will work closely with City staff to design a project brand that will be relevant and compelling for the Missoula community, and we will apply this brand to project deliverables, templates, the project website, and any other public facing material.
- **Key messages** - We will prepare nuanced messaging catered to each group we are trying to reach that addresses the “who,

what, where” of the project and a call-to-action. We will use techniques best suited to the feedback we are seeking from that audience at that point in time. Establishing a set of clear and relevant key messages to target audiences is an important initial step in project development. Important considerations for key messaging includes a clear narrative that is tailored to be relevant to the audience/community and intentionally choosing terminology that is culturally relevant and avoids jargon, metaphor, or euphemisms that might not be easily understood, especially when translated into languages other than English.

- **Tools, Techniques and Platforms** - We will work with City staff and local community leaders to identify the best tools and techniques for engagement, however, we expect our toolbox to include large scale community workshops, focus groups, online surveys and activities, informational material, public notifications, and any other innovative engagement strategies the team thinks up. We expect to use a variety of communication channels (ie. project website, social media, radio, e-newsletter, etc.) and will regularly use these platforms to notify the public about project updates.
- **Meeting People Where They Are** in both the literal and figurative sense will be an important strategy for crafting opportunities to reach the most community members. Outreach at established (and popular) events, community gathering sites, and digital spaces can aid in those efforts. Fun, family-oriented activities attract attention and can be a touchpoint to share project information, gather input, build project “buzz” and perhaps reach an audience that may not otherwise actively engage. Connecting with people in the physical space is another way to increase participation in the virtual space, and we will identify key milestones where we will “hit the streets” to increase overall engagement.



- **Incentives for Participation.** Outreach for the project should also include a budget for incentives. Incentives for participation are an important tool to recognize and demonstrate that the time and feedback of the community is important and valuable. Gift cards or cash incentives are typically the best method to reward community members for their time and input. The community is frequently asked for their input or participation in public processes, and providing an incentive that values their time and energy can be an important distinguishing factor for getting people to pay attention, participate, and feel invested in a particular project. On a related note, it's important to design outreach and survey tools with recognition that the community might already be feeling "burnt out."

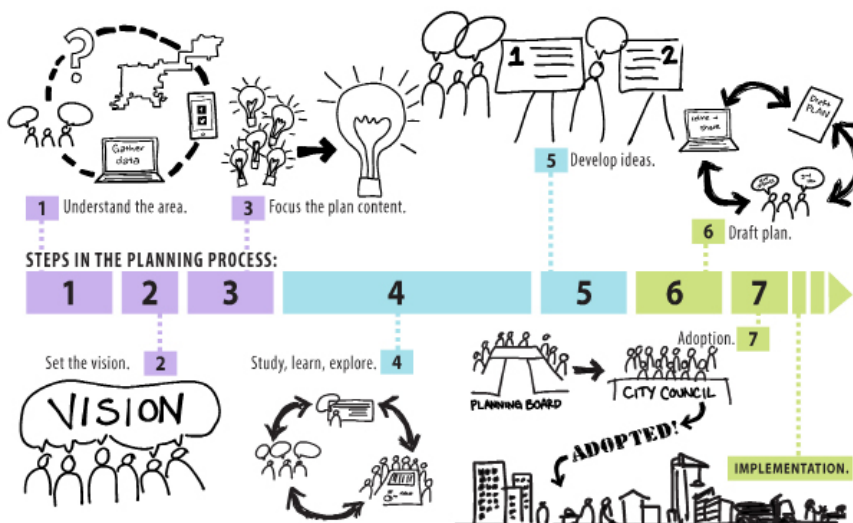
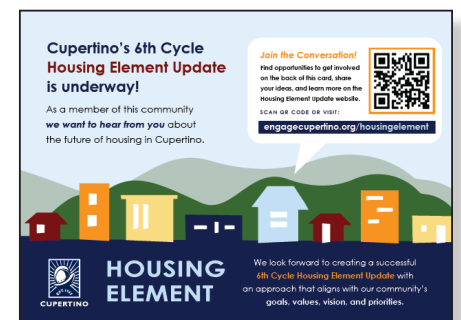
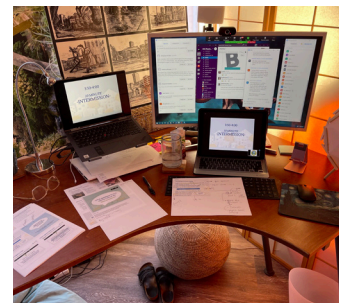
1.4: Project Management Plan. During the initial Kick-off Meeting, we will discuss a Project Governance Structure that outlines roles and responsibilities, meeting frequency, project milestones, and schedule. We are anticipating weekly meetings with the core project team throughout the project to maintain close coordination.

TASK 1: DELIVERABLES

- Project schedule, with task deadlines and major milestones.
- Final scope of work.
- Final Community Engagement Plan.

TASK 1: MEETINGS

- Kick-Off Meeting
- Ongoing Team Meetings



TASK 2 : PROCESS & ORGANIZATION AUDIT

2.1: Process and Organization Audit: Our team will review the existing code in detail and perform an audit that analyzes the following topics.

- **Substance** - Does the code promote development that is consistent with the city policies? The extent of this analysis at this stage of the project will largely vary based on the anticipated integration between this effort and the Growth Policy Update.
- **User-Friendliness** - How intuitive is the code? How does it compare to industry best practices? Does the code use terms consistently or are there various definitions for the same or similar terms? How clear are “rules of measurement” and are these rules applied the same throughout the code?
- **Process Audit** - How predictable is the review process? Are applicants treated fairly, and are expectations communicated clearly? How does the review process contribute to housing affordability and equity?

We will present our findings to staff and will discuss potential changes to incorporate into the Baseline UDC based on our analysis and will determine what, if any, changes should be adopted as part of the Baseline UDC.

2.2: Annotated Outline of Baseline UDC: The extent of the Baseline UDC will depend on the initial scoping of the overall project. Our recommendation is to limit the scope of the “first update” at this phase, which we expect will shorten the overall time it will take for project completion. The first phase of a code adoption takes political will and community support, and

we are hesitant to spend the effort adopting a new code that is marginally better than the previous version, as it risks losing project momentum and support if the perception is that there is little change for the overall effort. However, we respect staff’s instincts and look forward to discussing the best approach to the baseline UDC.

Regardless of the extent of the Baseline UDC, we will prepare an initial outline of changes to make to the UDC based on the initial Audit.

2.3 Engagement Cycle #1. Engagement during Task 2 is anticipated to focus on interviews and work sessions with City staff across departments, and interviews or small group discussions with frequent code users, such as developers, real estate professionals, architects, and housing advocates. Exact details will be determined through close coordination with City staff and based on the Engagement Plan and the overall project scope.

If a new Baseline UDC is going to be adopted during this task, much more engagement will need to take place, and would limit the amount of engagement later in the process. We generally recommend consolidating the Comprehensive Code reform into one update that makes significant and robust changes at one time, however, we are open to discussing this approach with staff.

TASK 2 DELIVERABLES (TASK 2.3)

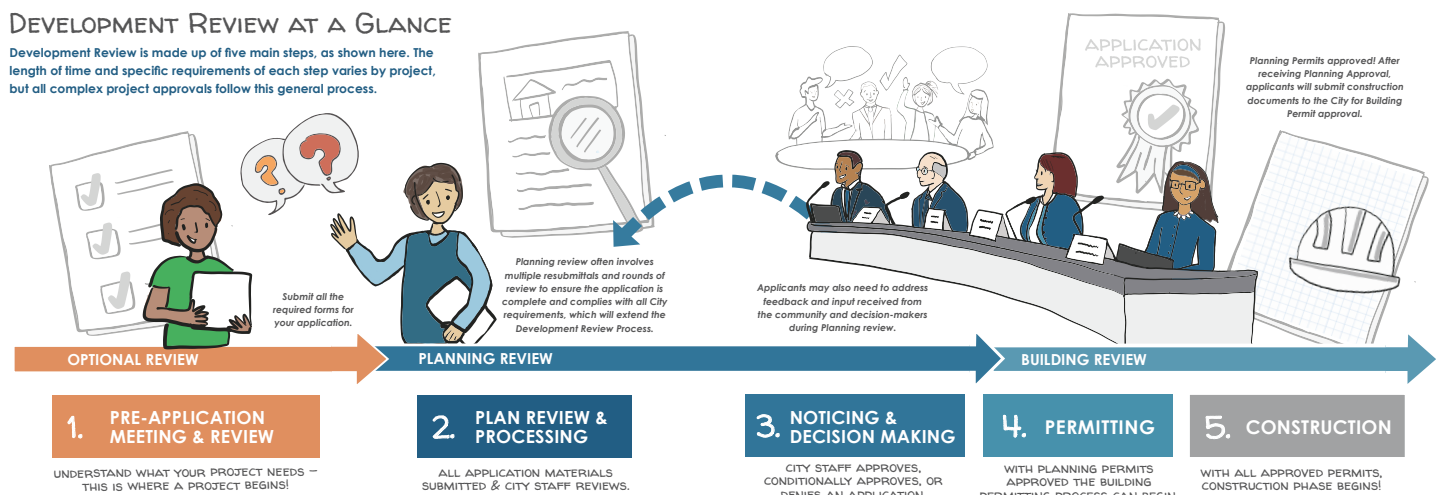
- Process Audit Recommendations Report
- Annotated outline of UDC baseline

TASK 2 MEETINGS

- Process Audit Work Session with Staff
- Stakeholder Interviews and Small Group Discussions with Frequent Code Users

DEVELOPMENT REVIEW AT A GLANCE

Development Review is made up of five main steps, as shown here. The length of time and specific requirements of each step varies by project, but all complex project approvals follow this general process.



TASK 3 : COMMUNITY INNOVATION AUDIT

3.1: Policy Alignment Audit. We will conduct a community vision check-in, using current city policies as a foundation. This task will be integrated with Task 4, as the ongoing effort to update the Growth Policy may inform what city policies remain and what policies are updated.

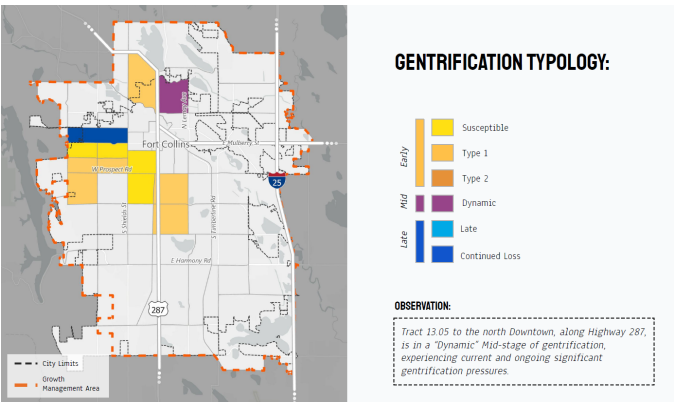
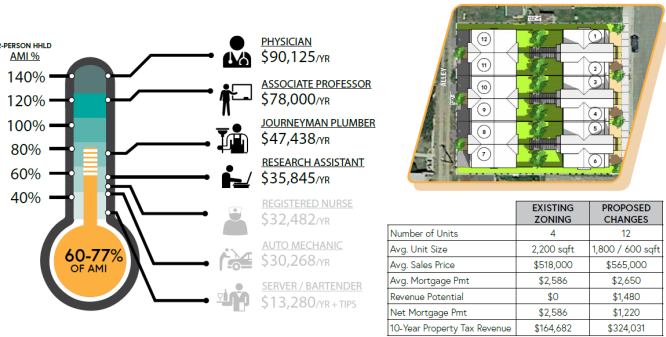
3.2: Equity in Land Use Evaluation. We applaud the City for including an analysis of equity in the code reform project. An equitable public engagement process, expert review, and in-depth analysis are essential to identifying changes that will most effectively advance more equitable development outcomes. Further, to support code changes, decision-makers need objective, quantitative data that shows how the changes will lead to more equitable development patterns, in addition to qualitative input from impacted community members.

Our proposed approach to the Equity in Land Use Evaluation goes beyond simply reviewing the code and identifying regulations that may perpetuate inequitable outcomes. We propose a set of analyses that will help to quantify, model, and map the inequitable outcomes themselves. These analyses will help decision-makers to understand the complete picture of inequity. It also will help the City to target and prioritize code changes strategically in order to have the greatest impact in advancing more equitable outcomes. Accordingly, our evaluation includes two tracks of work: (1) a review and assessment of the City’s land use regulations and standards and (2) a spatial equity assessment that evaluates equity impacts of where those regulations apply under the zoning map, land use map, and other regulatory boundaries. The Equity in Land Use Evaluation may include some combination of the following, depending on the exact needs of Missoula, and based on staff’s input.

- Assessment of Code Standards
- Zoning Map Analysis
- Inclusion and Affordability Analysis
- Access to Opportunity Analysis
- Displacement and Gentrification Analysis

260 N. Pine Street - R2 Zone - Preferred Concept

If minimum lot area and street frontage requirements were relaxed, a range of alternative concepts could be built, all with smaller, more affordable unit sizes.



3.3: Community Form Analysis. We will document and analyze the existing built patterns throughout the City, and explain “why” the city looks the way it does. Connecting built form to city history builds a powerful narrative and helps people to understand the potential impact they can have in updating the city code. As part of this analysis, we will look at the following patterns and trends.

- Year of Construction
- Setbacks
- Landscaping and Trees
- Lot Coverage
- Height
- Bulk, Massing and Articulation
- Transparency and Window Patterns
- Variances
- Other Elements of Architectural Significance.

Results will be collected and presented including photo inventories, models of “typical” development patterns, lot size analysis, setback analysis, street network, and other data that is readily available.

3.4 Engagement Cycle #2. Explain findings from Community Character and Equity Analysis. These are technical topics, so we recommend spending time with the community explaining the analysis and answering questions to ensure widespread understanding.

3.5: Scenario Modeling of Innovation Strategies. Cascadia Partners is a nationally-renowned scenario planning and urban analytics firm. Our staff played an instrumental role in the development of two of the most widely-used scenario planning platforms: Envision Tomorrow and UrbanFootprint. We have helped clients across the country develop scenario plans, calibrate scenario tools, and develop custom scenario planning software. We have experience using a range of tools and are in a unique position to help the City of Missoula find the scenario modeling approach that best fits your needs.

CP proposes that the specific scope and methodology of the scenario modeling process is determined following the completion of the code audit tasks, in-depth discussion with staff, and initial

community engagement. This will allow us to design a process and scope that best aligns with the needs of the project and ensures the analysis will most effectively support key decisions. Our suite of tools and capabilities allow us to customize our approach to scenario modeling. Based on the information in the RFP, we suggest that one of the following three general approaches would be effective for the code reform project.

1. **Conceptual Code Update Scenarios** - Test how code changes affect the mix of building types in various locations citywide.
2. **Housing Capacity and Affordability Estimates** - Model how the changes affect citywide capacity for new housing development and the potential affordability of new housing; model how many additional housing units would be possible to build on every parcel citywide and average affordability levels of new housing.
3. **Development Projections** - This approach takes the capacity and affordability modeling a step further by making projections about which parcels will develop over a given-time frame given a set of code changes. This approach uses existing property values and pro-forma models to predict likelihood of new development or redevelopment.

Regardless of the type of scenario modeling approach, our tools allow us to model the performance of each scenario on a range of indicators (performance metrics), and we will work with the project team to decide the right indicators to use for the project. We expect indicators to include:

- Greenhouse gas emissions
- Vehicle miles traveled
- Transit ridership
- Energy and water use
- Land consumption
- Carbon sequestered
- Housing unit density
- Walkability

Community Innovations Audit Report. We will combine the results from the Community Form Analysis and the Scenario Modeling into a concise, user friendly Community Innovations Audit Report. This report will rely heavily on graphics and visualizations in order to create a more engaging, accessible document, and we will integrate key findings into the project website for widespread dissemination of the material.

Part of this report will be a set of visually engaging scenario “report cards” that paint a vivid picture of potential impacts and benefits of code reforms to share with the community, policymakers, and other stakeholders. Participants are given a more complete picture of the outcomes associated with each alternative scenario and are given an opportunity to weigh in on the elements of each that they like and dislike. This input can be used to craft more refined code changes as well as modifications to the Growth Policy and Future Land Use Map.

3.7: Engagement Cycle #3. We will share the Community Innovations Audit Report throughout the community, and we will meet with a variety of audiences to review and discuss the report. As part of this task, we expect the following events.

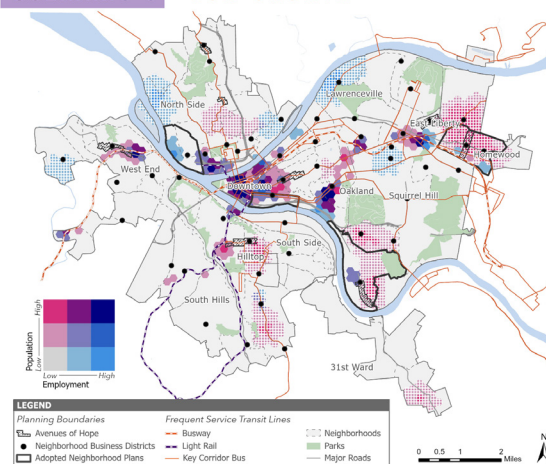
- Staff Work Session
- Executive Leadership Team Meeting
- Synchronous Community Workshop
- Asynchronous Virtual Meeting / Survey
- City Council and/or Planning Board Work Session

We will plan a “synchronous” and broad Community Workshop as part of this Engagement Cycle, and it can be either in person or virtually, depending on current public health best practices. This will give us an opportunity to hear directly from the community about the innovations and strategies they want integrated into their code. We will also include an “online equivalent” with a recording of the presentation and a way to collect public feedback during a time that is convenient for the user.

3.8: Framework for Next Steps Report. Task 3 culminates with a Next Steps Report that summarizes our technical findings, the community response and direction, and our recommended next steps. We will share this report with City staff and document the next steps in a Technical Memo.

SCENARIO C – LOW GROWTH

3.6:



TASK 3 DELIVERABLES

- Equity in Land Use Recommendations Report
- Community Innovations Audit Report including Identified inconsistencies, misalignments, and gaps between existing codes and policies
- Final Framework for Next Steps Report, including Summary Policy Direction and strategy options for future code innovations

TASK 4 : GROWTH POLICY UPDATE

4.1: Growth Policy and Future Land Use Map: Discussion Draft. We will coordinate with City staff as you finalize the Growth Policy Updates, and our focus will be on the relationship between the code and the draft policy and map. This task will be informed by the modeling and analysis work done in Task 3, and exact roles and responsibilities of how these efforts are aligned will be discussed and refined through close coordination with City staff.

4.2: Engagement Cycle #4. This Engagement Cycle will begin to connect the analysis and modeling from Task 3 with the draft Growth Policy and Future Land Use Map. We expect this to include work sessions with staff and focus groups, and a robust online engagement to help the community understand and finalize the Public Review Draft.

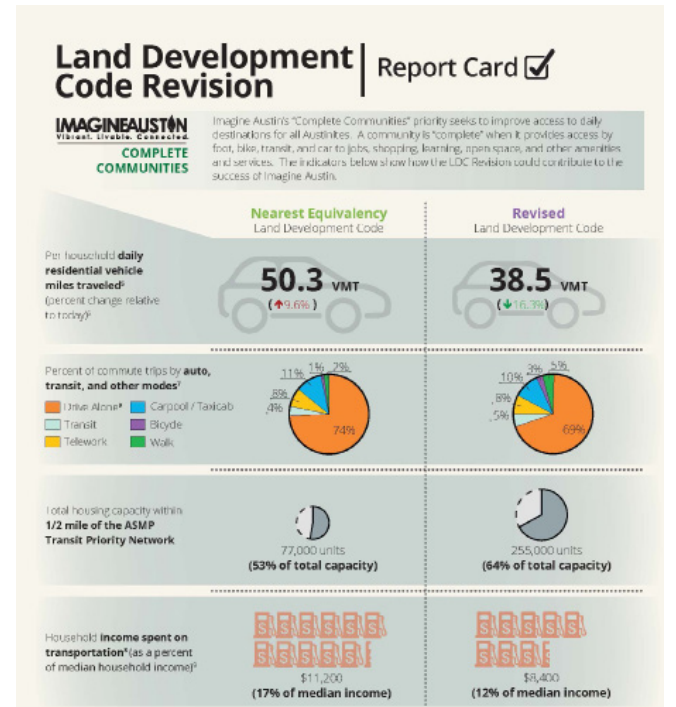
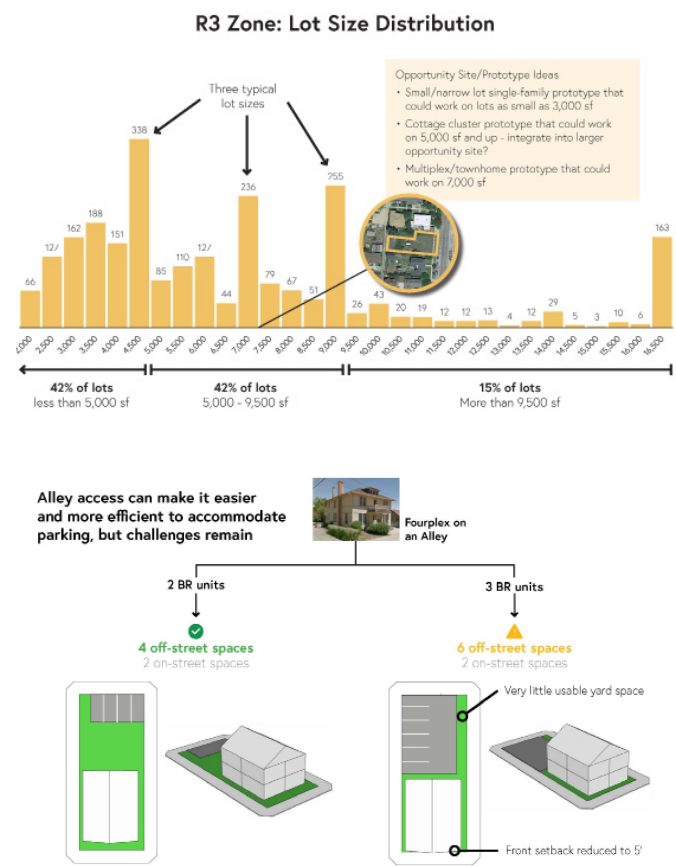
4.3: Growth Policy and Future Land Use Map: Public Review Draft. We will support City staff as you update and refine the Draft Growth Policy and Future Land Use Map, especially as it relates and informs the code updates and potential map changes.

4.4: Engagement Cycle #5. This Engagement Cycle will focus on the Confirmation of Priority Policies for the code rewrite and approach. For an effort of this potential magnitude, it’s important to build a strong collective understanding of policy priorities with City leadership to further articulate, prioritize, and communicate the adopted policies that will provide the foundation for the code update effort (beyond policy language. This step is critical, as it establishes community expectations early in the process and provides a rubric for decision makers to take action on the draft code in later stages.

4.5: Adopted Growth Policy and Future Land Use Map. We will support City staff in finalizing the Adopted Growth Policy and Future Land Use Map, as informed by community engagement.

TASK 4 DELIVERABLES

- Support Staff with the Adopted Growth Policy Update
- Support Staff with the Adopted Future land use map update



TASK 5 : UNIFIED DEVELOPMENT CODE

5.1: UDC and Zoning Map: Discussion Draft. We will develop a Draft Code, based on the recommendations in the Framework for Next Steps and to align with the Priority Policies, based on the Growth Policy and Future Land Use Map Updates, and other still relevant policies (identified in Task 2). The updated code will include illustrations and graphics, user friendly page layouts, streamlined navigation, and other best practices. The update may or may not include an updated Zoning Map, which will be determined in Tasks 3 and 4 and through close coordination with City staff.

In developing the draft, we will create an initial outline of the new code prior to drafting. We will also create a summary of changes matrix that documents the changes to the new Code. All proposed code changes will be presented based on their alignment to the Growth Policy Updates and other priority policies that will be codified in Task 4.

5.2: Guiding Documents: Discussion Draft. We will create updated Guiding Documents, such as revised applications, process graphics, workflows, and checklists, to aid in usability of the code. Exact deliverables will be determined with staff, however our intention is to reduce the overall dependency on guides by improving the user experience of the code itself. A more intuitive code without jargon and legalese does not need many guides, and this will be one of our primary objectives.

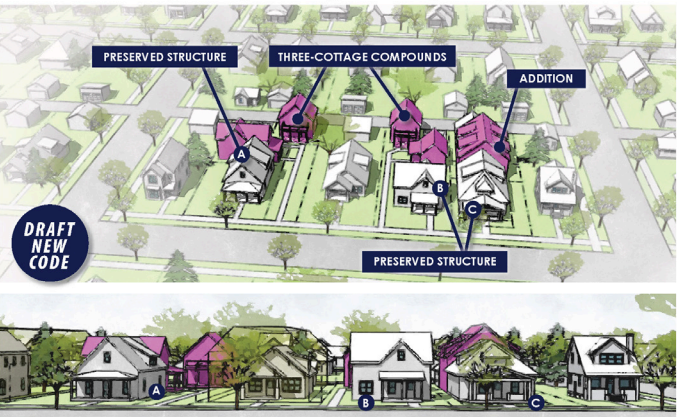
5.3: Engagement Cycle #6. This Engagement Cycle will include widespread outreach to target audiences including staff, (both planning and other city departments), frequent code users, Boards and Commissions, and the community at large. We also suggest broad “community testing” where local architects and designers use the draft code to test feasibility and usability of the draft code – this step is incredibly valuable and one that builds project champions through the process. We will also include information shared through the website specifically, encouraging the community to review the draft code and understand the potential benefits and intention behind the draft code. Our team often uses information sheets to provide a succinct, clear explanation of /high level themes to increase overall awareness and understanding of the code.

5.4: UDC and Zoning Map: Public Review Draft. We will update the draft UDC and Zoning Map, per input and feedback we receive during engagement. We will track changes in the Summary of Changes Matrix to clarify and explain the changes from the Discussion Draft.

5.5: Guiding Documents: Public Review Draft. We will revise and update the Guiding Documents based on input and feedback received during engagement. This will also include creating additional guides if we discover topics that are unclear or can benefit from additional guides.

DRAFT CODE PRESERVATION TOOLS: Cottages and Addition

To promote the preservation of existing structures throughout the central neighborhoods, the zoning code rewrite has introduced methods to allow additional structures to be constructed in the middle and rear portions of existing lots. These new form types are purposely small in order to match the size and scale of existing cottages, only requiring small lot sizes to be constructed. The Compact Urban Cottage allows for the separation of fee simple lots to be sold, but requires the creation of a common court frontage element and a Home Owner's Association. The three cottage compound does not require these elements as it is a rental configuration, but it does require the property owner to live on site. The current zoning code does not offer the flexibility displayed in these examples with regards to lot size. Often, the minimum lot sizes of the current code favor the scraping and rebuilding of structures within the R3 neighborhoods as exemplified in the previous example. However, the new form types make it possible to preserve an existing residence and add a second or third unit. In addition to these new form types, the new code introduces a "mostly preserved structure" feature that allows for additions to be more easily added to existing structures if at least 75% of the structure and 75% of its roof is preserved.



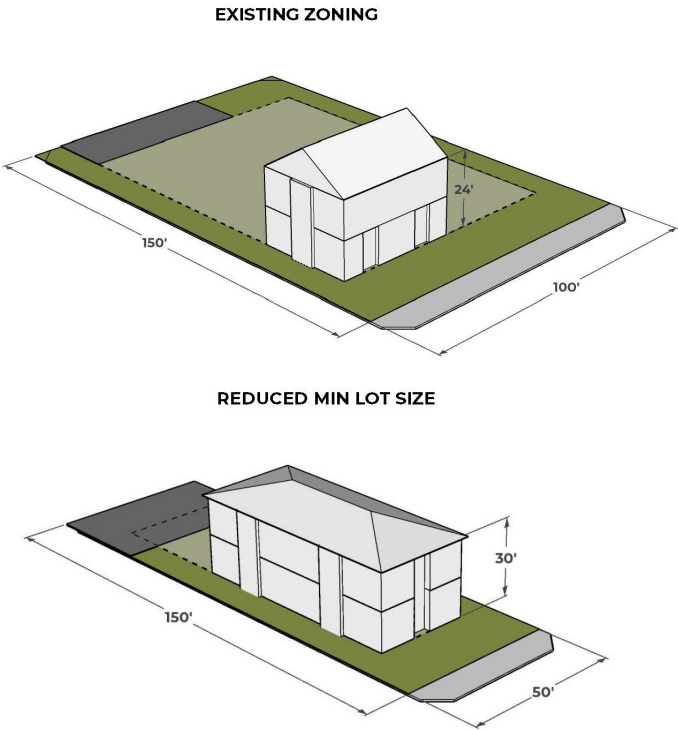
	ZONE STANDARD	AS ILLUSTRATED
Lots	6,000 sf min.	1 - 10,500 sf lot; 2 - 7,000 sf lots (50' x 140' each)
Number of Buildings	3	2 new buildings per lot, total of 3 (A and B); no change in number of buildings (C)
Total Building Floor Area	3,000 sf max. per lot	3,000 sf per lot (A and B); 75% preserved structure, addition allowed in rear

R-2 ZONE

FOURPLEX

Reducing the minimum lot size to allow a 4-plex on a standard lot reduces achievable rents by 27%

Land costs dropped by 50% compared to the lot size required by existing zoning.



5.6: Engagement Cycle #7. We will conduct another round of engagement depending on what topics or groups need further review and discussion. This will give us a chance to adjust our engagement based on what we are hearing from the community, and the exact audience, topic, and method of engagement will be responsive to what we are trying to accomplish and the feedback we receive during previous engagement. We expect staff to start taking more ownership of the draft at this point, so we expect our role in this engagement to be primarily support to staff.

5.7: Adopted UDC and Zoning Map. We will support staff through the Adoption Process, attending meetings with City Council and Planning Board to ensure a smooth and successful adoption. We will create an Adoption Draft and deliver this to staff, and will “train” staff on how to revise and update the draft. This is crucial, since our intention is to build staff understanding, support, and ownership of the code during the process, and we will ensure a smooth transition and handoff of the final document to staff.

5.8: Final Guiding Documents. We will finalize and deliver any Guiding Documents, and ensure staff is fully trained on the documents and how to revise or edit in the future.

TASK 5 DELIVERABLES

- Draft and Adopted updated UDC
- Draft and Adopted updated city zoning map – *if recommended by Tasks 3 and 4*
- Draft and Updated guiding documents including revised applications, workflows and checklists.

TASK 6 : FOLLOW THROUGH

Our approach largely seeks to build staff’s understanding and ownership of the UDC throughout the process. Co-creating the draft with staff, and as the Growth Policy is updated, will help us to build this ownership, which is key to a smooth implementation.

We will wrap up the project by providing recommendations to staff for how to manage and maintain the UDC over time, including a schedule for amendments, recommendations on staff capacity. We will draw from our team’s past public sector experience. We will provide summary direction for supporting documents and recommendations for potential additional resources and manuals, if needed, and we will provide a matrix and process for staff to track performance over time.

We will reserve time for a retainer for the first year after project completion, and we will participate in a 1 year check-in.

TASK 6 DELIVERABLES

- Potential Operations and Administrative Manual.
- Updated applications forms, workflows, and checklists.
- Provide a template for performance metrics tracking.
- Provide a minimum of five orientations/ trainings for city staff, decision making bodies and/or community over the first year after project completion (additional trainings would

5. COST PROPOSAL & FEE SCHEDULE

Missoula Comprehensive Code Reform Proposed Budget	METTA URBAN DESIGN			PETER PARK PLANNING		CASCADIA PARTNERS							SIX PONY HITCH			FUTUREWEST		MORE SKY LESS CEILING		Total Hours	Total Cost
	Samantha Suter (PM)	Phoebe Loyd	METTA TOTAL	Peter Park (PIC)	PETER PARK TOTAL	Alex Steinberger	Robert Liberty	Jamin Kimmell	Irene Kim	Senior Associate	Associate	CASCADIA TOTAL	Spider McKnight	Travis Wilson	SIX PONY HITCH TOTAL	Randy Carpenter	FUTUREWEST TOTAL	Rachel Cain (CE)	MORE SKY LESS CEILING TOTAL		
	\$ 140	\$ 90		\$ 250		\$ 200	\$ 150	\$ 155	\$ 155	\$ 130	\$ 115		\$ 250	\$ 150		\$ 135		\$ 150			
Task 1: Project Start-Up	48	86	\$14,460	40	\$10,000	18	12	18	30	30	8	\$17,660	24	20	\$9,000	20	\$2,700	130	\$17,820	484	\$71,640
1.1: Background Document Review	12	8	\$2,400	8	\$2,000	8	8	8	8	8	8	\$7,240	4	4	\$1,600	8	\$1,080		\$0	92	\$14,320
1.2: Final Scope of Work and Schedule	12	2	\$1,860	12	\$3,000	4	2	4	4	4	-	\$2,860	2	-	\$500	2	\$270		\$0	48	\$8,490
1.3: Community Engagement Plan	12	64	\$7,440	12	\$3,000	4	2	4	16	16	-	\$6,280	16	16	\$6,400	8	\$1,080	130	\$17,550	300	\$41,750
1.4: Project Management Plan	12	12	\$2,760	8	\$2,000	2	-	2	2	2	-	\$1,280	2	-	\$500	2	\$270	2	\$270	46	\$7,080
Task 2: Process and Organization Audit	88	112	\$22,400	62	\$15,500	-	28	24	16	48	36	\$20,780	16	16	\$6,400	36	\$4,860	36	\$4,860	518	\$74,800
2.1: Process and Organization Audit	48	32	\$9,600	36	\$9,000	-	12	8	4	16	4	\$6,200	4	4	\$1,600	20	\$2,700		\$0	188	\$29,100
2.2: Annotated Outline of New UDC	32	48	\$8,800	18	\$4,500	-	8	8	4	8	8	\$5,020	-	-	\$0	8	\$1,080		\$0	142	\$19,400
2.3: Engagement Cycle #1	8	32	\$4,000	8	\$2,000	-	8	8	8	24	24	\$9,560	12	12	\$4,800	8	\$1,080	36	\$4,860	188	\$26,300
Task 3: Community Innovation Audit	184	250	\$48,260	190	\$47,500	92	46	146	76	258	318	\$129,820	76	36	\$24,400	88	\$11,880	60	\$8,100	1,820	\$269,960
3.1: Policy Alignment Audit	24	48	\$7,680	40	\$10,000	4	16	8	4	8	4	\$6,560	-	-	\$0	24	\$3,240		\$0	180	\$27,480
3.2: Equity in Land Use Evaluation	36	18	\$6,660	36	\$9,000	28	8	32	12	72	116	\$36,320	4	4	\$1,600	8	\$1,080		\$0	374	\$54,660
- Access to Opportunity Analysis	12	6	\$2,220	12	\$3,000	12	-	8	4	24	36	\$11,520	-	-	\$0	-	\$0		\$0	114	\$16,740
- Neighborhood Typology Analysis	12	6	\$2,220	12	\$3,000	12	-	8	4	24	40	\$11,980	-	-	\$0	-	\$0		\$0	118	\$17,200
- Housing Affordability Modeling	12	6	\$2,220	12	\$3,000	4	-	16	4	24	40	\$11,620	-	-	\$0	-	\$0		\$0	118	\$16,840
3.3: Community Form Analysis	48	64	\$12,480	30	\$7,500	2	-	8	4	20	30	\$8,310	4	4	\$1,600	8	\$1,080		\$0	222	\$30,970
3.4 Engagement Cycle #2	16	32	\$5,120	16	\$4,000	8	6	16	16	24	24	\$13,340	24	12	\$7,800	8	\$1,080	24	\$3,240	226	\$34,580
3.5: Scenario Modeling of Innovation Strategies	12		\$1,680	8	\$2,000	30	-	42	8	60	60	\$28,450	8	4	\$2,600	16	\$2,160		\$0	248	\$36,890
3.6: Community Innovations Audit Report	18	48	\$6,840	18	\$4,500	8	4	16	8	30	40	\$14,420	8	-	\$2,000	8	\$1,080		\$0	206	\$28,840
3.7: Engagement Cycle #3	18	32	\$5,400	10	\$2,500	8	6	16	16	24	24	\$13,340	24	12	\$7,800	8	\$1,080	36	\$4,860	234	\$34,980
3.8: Framework for Next Steps Report	12	8	\$2,400	32	\$8,000	4	6	8	8	20	20	\$9,080	4	-	\$1,000	8	\$1,080		\$0	130	\$21,560
Task 4: Growth Policy Update	98	134	\$25,780	116	\$29,000	22	68	58	40	80	80	\$48,190	48	32	\$16,800	34	\$4,590	48	\$6,480	858	\$130,840
4.1: Growth Policy and Future Land Use Map: Discussion Draft	24	32	\$6,240	24	\$6,000	4	18	14	4	16	16	\$10,210	4	-	\$1,000	16	\$2,160		\$0	172	\$25,610
4.2: Engagement Cycle #4	18	28	\$5,040	18	\$4,500	2	8	12	12	24	24	\$11,200	24	16	\$8,400	4	\$540	24	\$3,240	214	\$32,920
4.3: Growth Policy and Future Land Use Map: Public Review Draft	18	28	\$5,040	18	\$4,500	4	20	8	4	8	8	\$7,620	2	-	\$500	8	\$1,080		\$0	126	\$18,740
4.4: Engagement Cycle #5	18	28	\$5,040	24	\$6,000	8	4	16	16	24	24	\$13,040	16	16	\$6,400	4	\$540	24	\$3,240	222	\$34,260
4.5: Adopted Growth Policy and Future Land Use Map	20	18	\$4,420	32	\$8,000	4	10	8	4	8	8	\$6,120	2	-	\$500	2	\$270		\$0	116	\$19,310
Task 5: Unified Development Code	284	453	\$80,530	284	\$71,000	16	40	98	44	110	120	\$59,310	64	24	\$19,600	84	\$11,340	84	\$11,340	1,705	\$253,120
5.1: UDC and Zoning Map: Discussion Draft	64	120	\$19,760	64	\$16,000	-	12	24	4	24	32	\$12,940	12	-	\$3,000	24	\$3,240		\$0	380	\$54,940
5.2: Guiding Documents: Discussion Draft	38	54	\$10,180	30	\$7,500	-	4	4	-	4	-	\$1,740	4	-	\$1,000	12	\$1,620		\$0	150	\$22,040
5.3: Engagement Cycle #6	46	65	\$12,290	46	\$11,500	8	8	16	16	20	24	\$13,120	8	8	\$3,200	8	\$1,080	38	\$5,130	311	\$46,320
5.4: UDC and Zoning Map: Public Review Draft	32	84	\$12,040	48	\$12,000	-	12	16	4	16	24	\$9,740	8	-	\$2,000	16	\$2,160		\$0	260	\$37,940
5.5: Guiding Documents: Public Review Draft	20	32	\$5,680	36	\$9,000	-	4	4	-	4	-	\$1,740	4	-	\$1,000	8	\$1,080		\$0	112	\$18,500
5.6: Engagement Cycle #7	16	28	\$4,760	20	\$5,000	8	-	16	16	24	24	\$12,440	20	16	\$7,400	8	\$1,080	46	\$6,210	242	\$36,890
5.7: Adopted UDC and Zoning Map	48	38	\$10,140	20	\$5,000	-	-	16	4	16	16	\$7,020	4	-	\$1,000	4	\$540		\$0	166	\$23,700
5.8: Final Guiding Documents	20	32	\$5,680	20	\$5,000	-	-	2	-	2	-	\$570	4	-	\$1,000	4	\$540		\$0	84	\$12,790
Task 6: Follow Through	30	-	\$4,200	30	\$7,500	-	-	-	-	-	-	\$0	-	-	\$0	-	\$0		\$0	60	\$11,700
	30		\$4,200	30	\$7,500							\$0	-	-	\$0		\$0		\$0	60	\$11,700
			\$0		\$0							\$0	-	-	\$0		\$0		\$0	-	\$0
			\$0		\$0							\$0	-	-	\$0		\$0		\$0	-	\$0
Tasks Subtotal	732	1,035	\$195,630	722	\$180,500	148	194	344	206	526	562	\$275,760	228	128	\$76,200	262	\$35,370	358	\$48,600	5,445	\$812,060
	Stipends for Community Liasons																				\$21,600
	Travel Expenses (6 Trips, 4 People Each Trip)																				\$16,080
	Grand Total																				\$849,740

Travel Expenses Detail	
Airfare per person	\$400
Per diem meal reimbursement	\$60
Number of days per trip	2
Per diem lodging reimbursement	\$150
Number of nights per trip	1
Number of staff per trip	4
Total Travel Expenses per Trip	\$2,680.00

Community Liason Stipends Detail	
Stipend per liason per month	\$150
Number of liasons	8
Number of months	18
Total Stipend Expenses	\$21,600

APPENDIX 1: Resumes



SAMANTHA SUTER

OWNER AND PRINCIPAL

AREAS OF EXPERTISE

Urban Design / Planning

Public Engagement and Participatory Planning

Design Standards and Guidelines

Form-Based Code, Hybrid Code Illustrations, and Development Standards

Project Management and Client Relations

EDUCATION

Master of Urban Design, University of Colorado, Denver

Bachelor of Landscape Architecture, University of Georgia

Urban Design Certificate, Cortona, Italy

LICENSES

Registered Landscape Architect (#6241)

LEED Accredited Professional

PAST EXPERIENCE

Sketchup Instructor, University of Colorado Denver

Visualizations for Planners, University of Colorado Denver

Project Manager, MIG, Inc.

Urban Designer, City and County of Denver

Principal of Landscape Architecture, Metta Landscapes

ABOUT

Samantha Suter is a professional urban designer, landscape architect, and planner who has contributed to a variety of projects at every scale. Samantha brings an innovative approach to urban design and planning by emphasizing illustrations and ease of use of the final deliverable. Her work has a strong focus on implementation, and she is leading the country in regulatory illustrations with her work cited in publications nationwide as the benchmark for code illustrations. Her technical expertise includes developing urban design typologies, placetypes, regulations, and incentive-based design standards and her past work includes calibrating building forms to support specific urban design principles, and applying market analyses to form and density standards. She is currently teaching Visualizations for Planners at the University of Colorado Denver's Master of Urban and Regional Planning school and continues to mentor students in effective storytelling and critical thinking.

Samantha enjoys sharing her work with communities and her passion for designing community spaces and crafting regulations are contagious. She is committed to reaching an outcome that reflects all stakeholders' input with implementable actions and easy to understand final documents. Samantha excels at taking complex ideas and presenting them in a way that people understand, and can respond to, and thus as a community, take ownership of the ideas and shape them collectively. This is how Samantha has been so successful as a professional urban designer and landscape architect, and her work creating visualizations to build strong communities is what excites her most about urban design.

RELEVANT EXPERIENCE

- Single Family Architectural Standards for Olde Town | Issaquah, Washington
- Golden Code Audit and Rewrite | Golden, Colorado
- ADU Toolkit | Milpitas, California
- Priority Place Types, City Plan | Fort Collins, Colorado
- Denver Zoning Amendments and User Guides: Arapahoe Square, Cherry Creek North, Suburban Mixed-Use Zoning District, South Sloan's Lake, 38th and Blake Incentive Zoning, National Western Center Zone District, Row Home Access Drives, Open Space Requirements for General Development Plans | Denver, Colorado
- Denver Zoning Code Illustrations | Denver, Colorado
- Riverfront Zone District | Canon City, Colorado

METTAURBANDESIGN



PETER PARK

OWNER AND PRINCIPAL

303.378.4810 | peter@peterpark-planning.com

AREAS OF EXPERTISE

Form-Based Code

Urban Design / Planning

Highways to Boulevards

Architecture

EDUCATION

Masters Degree, Urban Planning,
University of Wisconsin-Milwaukee

Masters Degree, Architecture, University
of Wisconsin-Milwaukee

Bachelor of Science in Architectural
Studies, Arizona State University

PAST EXPERIENCE

Planning Director, City and County of
Denver

Planning Director, City of Milwaukee

Form-Based Codes Institute (FBCI)
Resource Council Member

Visiting Design Critic in Urban Planning
and Design, Harvard Graduate School of
Design

Lincoln Loeb Fellow, Harvard Graduate
School of Design

Associate Professor Adjunct of Urban
Design, University of Colorado

Adjunct Assistant Professor, University of
Wisconsin Milwaukee

ABOUT

Peter Park is a city planner and educator with over 25 years experience in both private and public sectors. He served as planning director of two large American cities and is internationally recognized for leading innovation in land use and transportation planning practice. He oversaw comprehensive zoning code and map replacements in Milwaukee and Denver that delivered innovation with practical results, streamlining development permitting, guiding high quality design, and implementing the urban vision identified in each city's Comprehensive Plan. Through extensive interdepartmental coordination and public engagement, both zoning codes received broad community support and were unanimously adopted. As a former planning director, Peter has unique perspectives on urban development and regeneration and special expertise in the areas of collaborative community planning, zoning code reform, transit-oriented development, and organizational management. He has overseen preparation of numerous plans, comprehensive zoning code updates, and implementation of major infrastructure and development projects in both large and small cities. His focus on the linkage between innovative planning and practical implementation strategies has delivered lasting improvements in communities where he has worked both in the U.S. and abroad.

RELEVANT EXPERIENCE

- Austin UDC Code Audit and Rewrite | Austin, Texas. Peter is a key player in rewriting Austin's Land Development Code. His work involved a deep dive diagnosis and community character inventory, where they used innovative methods including the Community Character in a Box. He continues to serve as an strategic advisor to staff, City Manager, and Mayor on completing the code, implementation strategies, and setting up organizational capacities for code administration and next level citywide and small area planning to ensure the code's success.
- re:code LA | Los Angeles, California. Peter has played a critical role in the preparation of the first comprehensive update of the Los Angeles zoning code since 1946. Re:code LA builds on the context and form-based approaches developed for the Denver Zoning Code and introduces new approaches for organizing use and form controls. In addition to being on the consultant team led by Code Studio, Peter also served as an Executive Policy Advisor to the Los Angeles Planning Director to ensure effective interdepartmental participation in the preparation and future implementation of the new code.
- Form-Based Codes Institute (FBCI) Resource Council Member. Peter serves on the FBCI Resource Council and teaches advanced FBC301 courses focused on implementation and administration of form-based codes. The Form-Based Codes Institute is a non-profit professional organization dedicated to advancing the understanding and use of form-based codes. FBCI develops standards for form-based codes; provides educational courses, workshops and webinars; and creates a forum for discussion and advancement of form-based codes.

Peter J. Park
City Planning and Design^{INC}



JAMIN KIMMELL, AICP

PARTNER

612.940.9087 | jamin@cascadia-partners.com

EDUCATION

Master of Urban and Regional Planning
Portland State University

Bachelor of Science,
Business Management
University of Colorado at Boulder

AFFILIATIONS

American Institute of Certified Planners
(AICP)

WORK EXPERIENCE

Partner, Cascadia Partners
December 2020 - present

Senior Associate, Cascadia Partners
August 2019 – December 2020

Planner, Angelo Planning Group
August 2016 – July 2019

Long Range Planner, Vancouver, WA
July 2015 – August 2016



ABOUT

Jamin is a land use planner and code specialist who focuses on crafting context-sensitive, market-feasible development regulations that help create more affordable and equitable communities. Jamin has six years of experience working across many facets of land use planning, housing policy, and development. He has experience managing and contributing to complete zoning code rewrites, housing policy plans, corridor plans, urban design studies, and development permitting. Jamin has both authored zoning codes for city governments and represented clients through the permitting process.

Jamin brings a depth of experience with regulatory issues and strategies related to housing. He has led multiple code audits to evaluate barriers to housing development and has performed extensive research into the best practices for residential design and development standards. He has authored residential development code standards for communities in Oregon, Colorado, and Wyoming.

Jamin is currently engaged multiple code audit and update projects for cities in Oregon to come into compliance with Oregon House Bill 2001, which requires all larger cities to allow duplexes, triplexes, quadplexes, townhouses, and cottage cluster housing in all residential zones. He can bring key insights and lessons from this work to other localities looking to successfully integrate “missing middle” housing in single-family residential zones.

Jamin also understands broader housing planning and policy issues. He has led technical work for over 10 housing needs studies and strategic plans. He is currently leading a pilot project to inform Oregon’s state requirements for local Housing Production Strategies.

SELECTED PROJECTS

- Fort Collins Land Use Code Update (City of Fort Collins, CO)
- Austin Land Development Code Update (City of Austin, TX)
- Park City Affordable Housing Code Incentives Audit (City of Park City, UT)
- La Grande Housing Production Strategy (City of La Grande, OR)
- Lander Housing Affordability Code Audit and Update (City of Lander, WY)
- Laramie Housing Affordability Code Audit (City of Laramie, WY)
- Woodburn Middle Housing Code Update Project (City of Woodburn, OR)
- Lake Oswego Middle Housing Code Audit and Neighborhood Character Study (City of Lake Oswego, OR)
- Aligning Zoning Code With Housing Goals: A Toolkit For Wyoming Communities (Wyoming Department of Commerce)
- Housing Options Project Code Audit; Beaverton, OR (previous employment)
- Eugene Middle Housing Land Use Code Audit; (Eugene, OR; previous employment)



ALEX STEINBERGER

MANAGING PARTNER

971.808.2366 | steiny@cascadia-partners.com

EDUCATION

Master of Urban and Regional Planning
Portland State University

Bachelor of Arts, Economics
University of California, Los Angeles

WORK EXPERIENCE

Managing Partner, Cascadia Partners
April 2018 to present

Project Manager, Fregonese Associates
September 2012 to April 2018

Assistant Planner, ODOT
November 2011 to August 2012

ABOUT

Alex is an urban planner and economist with a strong foundation in geographic information systems (GIS). He has over 10 years of experience working in the field of urban planning with a specialty in land use modeling. He has built and calibrated numerous scenario planning tools and was instrumental in the development of one of the most widely-used scenario software packages on the market: Envision Tomorrow.

Alex's work at Cascadia Partners focuses on zoning, economic, and policy analysis. He has experience working at a range of scales, from site-specific redevelopment projects to city-wide zoning code updates. In every project, Alex employs cutting edge planning tools and techniques with an eye for communicating complex topics to non-technical audiences. His experience has taught him that technical analysis is only as useful as the story it is able to tell.

SELECTED PROJECTS

Tigard Triangle Equitable Urban Renewal Plan Tigard, Oregon (2018 - 2020)

Alex served as the scenario planning and analysis lead for the City of Tigard's Equitable Urban Renewal Plan. This effort involved detailed scenario modeling of proposed capital projects such as trails, pedestrian bridges, and streetscape enhancements. For each proposed project, Alex analyzed the direct and catalytic impact and provided a range of performance metrics to community stakeholders. The project resulted in a budget-constrained funding package that directly reflected community desires for improvements that mitigated the potential for gentrification and displacement.

CodeNEXT Land Development Code Update Austin, Texas (2014 - 2020)

Technical lead for a dynamic consultant team that included Fregonese Associates, ECONorthwest, and Opticos Design. Alex developed an innovative scenario planning framework using Envision Tomorrow, a suite of urban and regional planning tools. Using this framework, Alex worked with elected officials and other stakeholders to test the impacts of a range of land development policies on housing capacity, affordability, and greenhouse gas emissions.

Fiscal Impacts of Residential Development San Antonio, TX (2018)

Working with developers and City of San Antonio staff, Alex developed a report that analyzed the fiscal impacts of a range of residential development types in various parts of the San Antonio region. The findings of this report were used to shed light on the financial and policy barriers that currently impede infill development in San Antonio and the beneficial impact of infill development on fiscal health.





IRENE KIM

PARTNER

503-459-7023 | irene@cascadia-partners.com

EDUCATION

Master of Urban and Regional Planning
Portland State University

Bachelor of Arts
Architecture & Community Design
University of San Francisco

CERTIFICATIONS

ToP Facilitation Methods
Certification Course, 2019
The Institute of Cultural Affairs

CIVIC ENGAGEMENT

ROSE
Community Development Corporation
Board Chair 2017-2019

ROSE
Community Development Corporation
Board Member 2013-2019

ACADEMICS

Portland State University
Adjunct Faculty
College of Urban and Public Affairs
- Urban and Regional Planning
Graduate Program

ABOUT

Irene Kim is an urban planner specializing in public and culturally-specific engagement and visual communications on a broad range of projects with public agencies and non-profits including site-specific redevelopment, corridor planning, housing, parks, active transportation, and regional visioning efforts. Her work includes designing innovative and interactive meetings and engagement tools both online and in-person to gain meaningful public feedback that aligns with actionable strategies and genuine community building.

Irene brings equity-based strategies that puts diversity and inclusion at the forefront of public engagement practices. Irene also brings years of experience planning and facilitating large and small group meetings to 100+ person workshops on complex subjects such as land use, urban design and code development. Relevant past projects include Vance Master Plan, Halsey Site Readiness and Code Development, Portland Clean Energy Fund Facilitation Strategy, Old Town/Chinatown Redevelopments, and the Expo Development Opportunity Study.

SELECTED PROJECTS

Halsey Site Readiness & Code Development - 2019 - 2020

Irene led the engagement for a multi-jurisdictional code development process for a major corridor spanning three small suburban towns. She developed a comprehensive public engagement strategy including targeted outreach to more vulnerable and non-English speaking populations, and lead the design of an online survey and project website. Visual storytelling was key in helping communities understand complex land use topics and engage in informed and meaningful ways.

Vance Properties Master Plan, Multnomah County - 2019-present

Irene is leading a master plan effort for a 90-acre brownfield site owned by Multnomah County in the diverse Rockwood neighborhood of Gresham. Irene teamed with a local community-based organization to implement an innovative engagement model that builds the capacity of hyper local community leaders to be at the forefront of engagement. Community leaders are helping to design meeting plans with the project team, but also act as conveners in reaching the most vulnerable and hard-to-reach populations in the area.





ROBERT LIBERTY

STRATEGIC PARTNER

503.313.9567 | robert@cascadia-partners.com

EDUCATION

Juris Doctor, 1981
Harvard Law School

Masters in Modern History, 1977
Oxford University

Bachelor of Arts in Political Science, 1975
University of Oregon Honors College

ABOUT

Robert is a land use attorney with almost 40 years of experience with the implementation, refinement and evaluation of the state, regional and local comprehensive plans, including housing elements. In the last four years he has led various efforts to promote accessory dwelling units. He has experience as an elected official, a county land use hearings officer, a planning consultant and attorney in private practice, as a staff attorney and director for a planning advocacy nonprofit organization and director of university-based urban sustainability assistance programs. Equity issues in planning and plan implementation have been a major element of his efforts since the mid-1990s.

Robert has provided assistance to many Sacramento area communities on aspects infill and redevelopment for several years, beginning in 2013. He organized educational tours in Portland and the Portland region for Sacramento city councilors and planning staff in 2018 as well as earlier education site visits for Sacramento area developers, suburban elected officials and Regional Transit Agency board members. He organized and helped lead a SACOG workshop on infill development in 2016. During 2020 he has contracts with SACOG to provide assistance to main street and arterial redevelopment efforts in Orangevale, Isleton and Colfax. He was elected to the Portland regional Metro Council in 2004 and re-elected in 2008. On Metro he was Co-chair of the regional Housing Choice Committee and shepherded a resolution granting Metro the authority to act on regional housing issues including the authority to fund affordable housing investments. (In 2018 the Metro area voters approved a \$653 million affordable housing bond measure.) In the mid-1990s he took the lead in organizing the Coalition for a Livable Future, possibly the first metropolitan coalition of affordable housing, racial justice and environmental protection nonprofit advocacy groups. CLF successfully persuaded Metro to address equity and affordability issues in its planning efforts. In the early 1990s he served as one of Multnomah County's contract land use hearings officers, which increased his understand of the way land use codes, review standards and appeal procedures shape outcomes and can heed or hinder plan implementation. In the 1980s he participated in the acknowledgment review process for cities and counties including compliance with the state's exclusionary zoning reform goal in Oregon. In addition to experience in California and Oregon, Robert has worked as a consultant, adviser and speaker on plan development and plan implementation in many other US states and metropolitan areas and for governments and organizations in China, New Zealand, Mexico and Canada.

SELECTED PROJECTS

AARP Accessory Dwelling Model State Act and Local Ordinance Update

Robert has a contract with AARP to manage the update of its 2000 Accessory Dwellings Model State Act and Local Ordinance. He will be preparing suggested revisions to the model act and ordinance and guiding the discussion of a dozen expert reviewers, taking into account new legislation, ordinances and evaluations of ADUs since 2000. The project is to be completed in 2020.

Davis, California Infill Redevelopment & Community Engagement

Sacramento Area Council of Governments - 2016-2017

Davis, California was known for community resistance to infill and redevelopment at any scale larger than a single family home. For the Sacramento Area Council of Governments Robert created and managed several community design workshops for property owned by the Davis Joint Unified School District which revealed that a more representative cross-section of Davis residents (and prospective residents) were receptive to much more intense infill development than City staff and officials believed.





RANDY CARPENTER

MANAGING PARTNER

(406) 5687-2974 | randy@future-west.org

EDUCATION

Master of Urban and Regional Planning
University of Iowa

Bachelor of Arts, History
University of Iowa

CIVIC ACTIVITIES

City of Bozeman

Design Review Committee

Planning Board

Impact Fee Review Committee

Parking Commission

Gallatin Local Water Quality District

Headwaters Community

Housing Trust Board

ABOUT

Randy Carpenter is Future West's Program Director. Randy provides land use planning and community development assistance to cities and counties throughout the Northern Rockies. He has assisted them through land use analyses, land use economic analyses, and process facilitation, and has led planning teams in the creation of growth policies, zoning and subdivision codes, and housing assessments.

SELECTED PROJECTS

Randy is currently leading teams in the communities of Manhattan and Three Forks, Montana in the development of new growth policies, which will be followed by capital improvement plans, impact fee ordinances, and new zoning codes. Randy recently completed the Successful Gardiner (MT) project, which produced, and widely distributed via the project website, webinars, and printed reports, a "Community Profile" that assessed the state of Gardiner and presented the various options available to the community; surveyed and interviewed a wide range of Gardiner residents regarding the concerns and ideas they have for changing the community's trajectory; and held three well-attended and lively community forums to discuss their options for the future and develop concrete plans for action.

RELEVANT EXPERIENCE

Future West, Bozeman, Montana

Responsible for Future West's community planning programs, including:

- The Successful Communities program, which helps Northern Rockies communities understand the trends affecting their economy and growth, and based upon that information, create a vision for the future and an action plan to implement their vision.
- The A Seat at the Table initiative, a partnership with the Bozeman Area Community Foundation that works to gather the perspectives of thousands of Gallatin County residents for use in community planning; in 2020 – 2021 the initiative's focus will be on affordable housing in Gallatin County.
- The Gallatin Ahead project, which brings community residents together to advocate for smart planning for the Gallatin Valley region.

City of Three Forks and Town of Manhattan, MT

Responsible for planning services, including analyzing applications for Conditional Use Permits, Variances, subdivision plats, and zoning map and zoning text amendments. Providing analysis, direction, and oversight of long-range planning and impact fee updates. Preparing grant applications to expand existing funding for planning services.

Sonoran Institute, Bozeman, Montana

Responsible for all aspects of Program Management, including fundraising, budgeting, staff management, program planning, project oversight. Created and managed the Sonoran Institute's Community Builders initiative, which helps communities make decisions about how they grow. Also responsible for designing and managing Northern Rockies Program community assistance and research projects. These efforts included comprehensive planning, community trainings, and the design of land use regulations.





SPIDER MCKNIGHT

MANAGING PARTNER

406-924-1111 | spider@sixponyhitch.com

EDUCATION

Portfolio Center. Major: Copywriting. Recipient of Best of Show, 8 Gold and 5 Silver Awards in student competitions. Two-time recipient of Portfolio Center Scholarship.

University of the South. Bachelor of Arts, 1987. Major: English. Member of the Order of Gownsmen (academic honor society).

AWARDS

Cannes International Advertising Film Festival. Finalist • Clio Awards. Finalist • Mobius Awards. Winner (2) • Art Director's Club. Winner • NY Addy Awards. Winner and Citations of Excellence • Telly Awards. Winner • International Film and TV Festival. Winner and Finalist • New York Festivals. Winner (2).

ABOUT

Spider McKnight facilitates meaningful and lasting results by helping organizations find and use their unique voices. Municipalities and partner agencies see public participation become more inclusive and impactful — and solutions roll into motion. Businesses and institutions widen their geographic reach and grow. Universities rethink programs and offerings to address the needs of students in an ever-changing economy.

Spider owns the strategic communications agency Six Pony Hitch. With her ability to see around corners and build strong scaffolding, she helps organizations power change with their communities. She builds expert teams to conduct qualitative research and co-creative community engagement and reconnects organizations to their purpose through radical listening, storytelling and marketing.

The most prestigious ad agencies in the world recruited Spider. At JWT and BBDO, she oversaw accounts with \$1M-\$50M budgets and earned national Cleo, Cannes, and ADDY Awards. Her activist work with LGBTQ, AIDS, and environmental groups taught her that there was power in bringing her worlds together for real social change.

At Six Pony Hitch, Spider puts her skills to use for businesses, nonprofits, universities, and municipalities that are the driving forces behind a more equitable, sustainable and diverse world economy.

RELEVANT EXPERIENCE

Missoula Downtown Master Plan

Community Engagement and Branding for Missoula's Downtown Master Plan

Missoula Redevelopment Agency

Worked with the MRA to discover how to improve community perceptions about Tax Increment Financing. Spoke to over 50 individuals and partner organizations.

LEARN Missoula

Worked with the City of Missoula and the group LEARN Missoula to create and implement a BIPOC-based qualitative and quantitative research plan to explore issues of systemic racism in Missoula's municipal government and provide community-based, BIPOC-driven solutions.





TRAVIS WILSON

LEAD DESIGNER

AREAS OF EXPERTISE

Brand Strategy & Identity

Graphic & Website Design

Environmental Design

ABOUT

Travis has a degree in graphic design from Oregon State University, where he studied under experts from Yale and Rhode Island School of Design. He is a brand strategist and senior graphic designer specializing in identity, packaging, website, and environmental design. He brought his insightful design approach to Six Pony Hitch in 2013 and has been a foundational member of the company. Travis has worked for clients across a range of industries including beverage, nonprofit, consumer goods and package, luxury, finance, and healthcare. He brings a unique perspective and an endless well of talent to all projects.

RELEVANT EXPERIENCE

Missoula Downtown Master Plan

Community Engagement and Branding for Missoula's Downtown Master Plan

Missoula Redevelopment Agency

Worked with the MRA to discover how to improve community perceptions about Tax Increment Financing. Spoke to over 50 individuals and partner organizations.

LEARN Missoula

Worked with the City of Missoula and the group LEARN Missoula to create and implement a BIPOC-based qualitative and quantitative research plan to explore issues of systemic racism in Missoula's municipal government and provide community-based, BIPOC-driven solutions.

EDUCATION

Bachelor of Arts

Graphic Design, Oregon State University





RACHEL CAIN

OWNER

720.641.6591 | RachelJCain@gmail.com

AREAS OF EXPERTISE

Online Community Engagement Management

Public Visual Arts

Cultural Planning & Implementation

EDUCATION

Master of Social Sciences, University of Colorado, Denver

Bachelor of Science, Behavioral Science, Metropolitan State University of Denver

ABOUT

MORE SKY LESS CEILING is passionately defining success without boundaries. By working collaboratively, the sky is not the limit, the sky is the starting place. Principal and Founder, Rachel Cain, has dedicated her life to supporting projects which define success by elevating the quality of the human experience.

MORE SKY LESS CEILING is a mindset of creative, fun, people-centric project management. There are many paths to success and no two projects are alike. As we partner with your team to meet your goals, More Sky Less Ceiling plays multiple roles to ensure a rich success.

FACILITATOR, where co-creation is key.

TRANSLATOR, helping all perspectives be heard and understood.

BRIDGE, closing the gap between people .

ADVOCATE, amplifying the voices of others.

LOGISTICS, because solving puzzles is an essential part of any goal.

COACH, where learning together never ends.

MORE SKY LESS CEILING is approaching projects with an open mind and a spirit of learning. To that end, there are three pillars that guide our approach to projects.

LISTENING to understand, not to respond.

CONTEXT is essential to understand how moving pieces fit together.

ITERATION demonstrates agility and responsive design.

RELEVANT EXPERIENCE

- Housing Element Campaigns - Manager of Online Community Engagement California | (Belvedere, Cupertino, Fairfax, Larkspur, Los Gatos, Monte Sereno)
- Cultural Planning Consultant | There Squared
- Public Art Submissions & Website Content Manager | Elmendorf/Guerts Public Art Studio
- Public Art Master Plan Associate Consultant | City of Colorado Springs Public Art Master Plan



MORE **SKY** LESS **CEILING**



PHOEBE LOYD

970.987.2143 | phoebe@mettaurbandesign.com

AREAS OF EXPERTISE

Graphic Assets and Visualizations
Branding and Project Identity
Digital and Print Marketing
Sustainable Design Standards

EDUCATION

Master of Urban Planning, University of Colorado, Denver

Master of Landscape Architecture, University of Colorado, Denver

Certificate in Environmental Policy, Management, and Law; University of Colorado, Denver

Bachelor of Horticulture, Washington State University

CERTIFICATIONS

Certified Green Roof Professional, Green Roofs for Healthy Cities

ABOUT

Phoebe Loyd is a professional graphic designer, sustainability advocate, and recent graduate of the University of Colorado Denver in Spring of 2021. With her academic and professional background, her inspiration in the field of planning is to help advance the intersection of sustainable landscapes, policy, and urban design. Phoebe has worked in many different disciplines during her professional and academic studies - leading to a diverse perspective of industries and systematic thinking.

Phoebe's specialty centers around creating successful visual narratives for clients through strategic graphic storytelling and dynamic content generation. Her range of skills for public-facing visual design include project identity, brand assets, photorealistic renders, web and print promotional materials, and document formatting. Her attention to detail has helped support many municipalities by leading bespoke campaigns that are tailored to the clients creative ideals. As a graphic-learner herself, she excels in creating visualizations that bring concepts, codes, and ideas to life.

At the Auraria Sustainable Campus Program (ASCP), Phoebe lead the marketing team through on-campus educational events and managing digital media communications which include website development, graphic assets, social media management, and campus partnerships. Her greatest achievement at the ASCP included her integrated capstone of writing the Sustainable Building and Landscape Development Standards for the ASCP and Auraria Campus in Denver, Colorado.

RELEVANT EXPERIENCE

- Housing Element Campaigns - Branding & Printed Materials | California (Belvedere, Cupertino, Fairfax, Larkspur, Los Gatos, Monte Sereno)
- ADU Toolkit | Milpitas, California
- Development Review Handbook | Milpitas, California
- Single Family Architectural Standards for Olde Town | Issaquah, Washington
- Sustainable Landscape & Building Development Standards | AHEC, Denver, Colorado
- Auraria Sustainable Campus Program Website | www.aurariascp.com | AHEC, Denver, Colorado

APPENDIX 2: Additional Project Examples



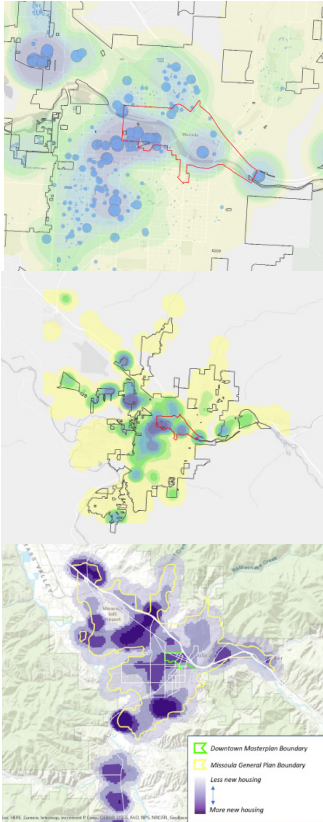


Image credit: YBA Architects

Client: Multnomah County
Department of County Assets,
Facilities and Property Management

Contact: Brett Taute, Project Manager
| 401 N. Dixon Street, Portland, OR
97227 | 503.519.2768 |
brett.t.taute@multco.us

Year Completed: 2020 - Present

Key Project Staff: Irene Kim
(Project Manager) | Alex Joyce
(Development Feasibility), Ayano
Healy (Engagement Support)

Downtown Missoula Master Plan Update

MISSOULA, MT | 2019

Cascadia Partners (CP) was part of a multidisciplinary team led by venerable new urbanist designers, Dover-Kohl. CP was charged with analyzing policies to address the lack of new housing development in Downtown Missoula and to make the case for continued growth in Downtown.

In order to identify housing production barriers in Downtown Missoula, Cascadia Partners performed an audit on four zone districts using real estate pro-forma. The results of this analysis provided achievable and impactful tweaks to downtown zones that will make housing more feasible at a variety of price points.

Cascadia's work also included scenario analysis at a regional scale. The purpose of this exercise was to show the benefits to the Missoula region if Downtown became its growth engine. CP staff modeled three growth scenarios: one that tested "business as usual," one that tested a build-out of Missoula's Growth Policy Plan, and one that tested Downtown's capacity for growth.

Vance Properties Master Plan

As the lead consultant for this project, Cascadia Partners was tasked with creating a new Master Plan for a combined 90-acre site owned by Multnomah County in the City of Gresham. The site presented major opportunities to fold in public amenities, but major considerations needed to be studied further in-depth regarding the environmental conditions on-site and the transition towards future development.

To create a truly community-lead engagement process, Cascadia Partners enlisted 12 community leaders that helped centered the voices of disadvantaged and under-represented communities in Rockwood. Frequent check-ins with the community leaders were structured to allow members to learn more about the site, environmental challenges, and project aspirations before a survey was disseminated through the community leaders. Having access to the rich social and community groups allowed for more marginalized voices (i.e., youth, low-income, and BIPOC groups) were represented in the over 800 surveys collected.

A virtual open house was created in English, Spanish, and Russian that allowed for broader outreach with the community. The open house utilized a web-based platform with highly visual maps and graphics. Based on the rich community engagement data collected, the final master plan is currently being drafted.



REFERENCE - GUNNISON PUD

Client: Gunnison Valley Properties LLC

Contact: Richard Bratton, Owner of Gunnison Valley Properties | 234 N Main St, Ste 3A, Gunnison, CO 81230 | 970.641.4531 | rbratton@hfak.com

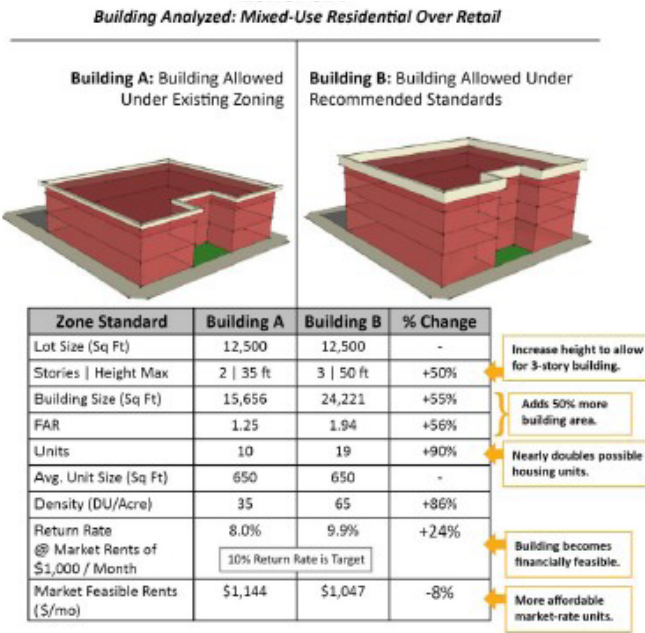
Year Completed: 2018 - present

Key Project Staff: Alex Joyce (Principal-in-charge) | Jamin Kimmell (Project Manager)

Gunnison Rising Planned Unit Development (PUD)

Cascadia Partners authored a comprehensive set of Planned Unit Development (PUD) development and design standards for a 633-acre master planned development in Gunnison, Colorado.

Cascadia Partners led a conceptual planning process to craft a compelling, yet practical and market-driven vision for the site. To implement this vision, Cascadia Partners--in coordination with a multidisciplinary team and a broad set of stakeholders--prepared the regulatory code to govern a phased, long-term development of the site. The PUD code complements and builds on the City of Gunnison's development code. The code lays out zoning districts, use regulations, dimensional standards, design standards, natural resource protections, and special use regulations. The development standards were informed by both design considerations and financial pro-forma modeling in order to create standards that achieved a built form intent while providing pathways for an affordable and diverse range of development projects.



REFERENCE - GUNNISON PUD

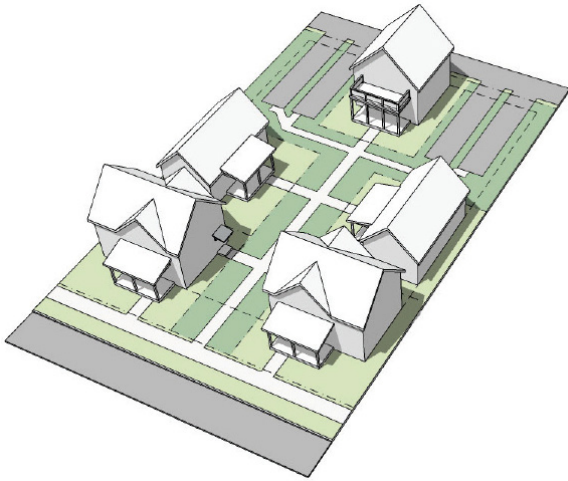
Client: City of Gunnison

Contact: Russ Forest, City Manager
RForrest@gunnisonco.gov
(970) 379-4290

Key Project Staff: Alex Joyce | Alex Steinberger

Downtown Gunnison Zoning Code Audit

Cascadia Partners completed a financial feasibility and urban design audit of the 3 zoning districts in greater downtown Gunnison Colorado, including two commercial zones and one residential zone. Using a pro forma model linked to SketchUp, Cascadia Partners identified design and financial feasibility issues within the current code, as shown in this infographic. Cascadia Partners also modeled alternative zone standards and made recommendations for changes to improve financial feasibility and affordability for desired building types, including missing middle housing types. This analysis spurred Gunnison's City Council to fund a larger, more comprehensive "affordability audit" of their zoning and building code.



REFERENCE - GOLDEN

Rick Muriby, Planning Manager
City of Golden
303-384-8098
rmuriby@cityofgolden.net

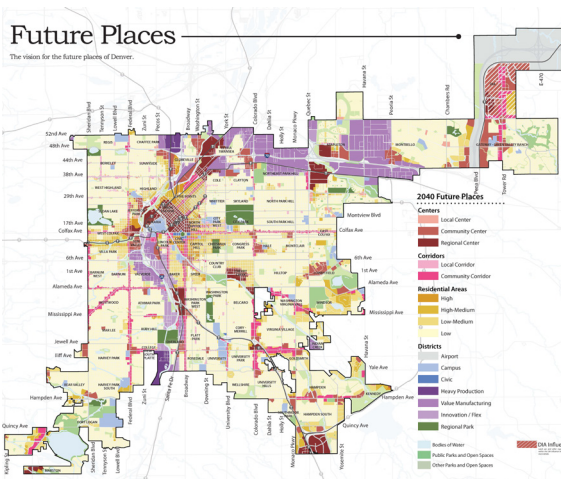
Key Project Staff: Samantha Suter (MUD) and
Peter Park (Peter J. Park LLC)

Golden Code Audit and Rewrite

Peter Park and Samantha Suter, as subconsultants to Pel-Ona Architects and Urbanists, created a new Golden Zoning Code. The first phase of the project included a code diagnostic study to identify issues and challenges regarding the current zoning code and review processes. A major finding of the study was that established neighborhood patterns were impossible to regenerate with the existing code, so new buildings were often out of character and scale with the surrounding neighborhood. This created a deep distrust between the community and the review process, since neighbors often opposed development proposals that were consistent with the city code and policies.

As part of the Code Audit and Rewrite, the team met with multiple stakeholders, using a variety of outreach techniques, including interviews and small group discussions with frequent code users, scoping sessions with Planning Commission and City Council, online community surveys using social media, and technical task force meetings. We originally planned for traditional, in person engagement, then shifted to all remote since Covid-19 struck early in the project. The code is currently going through public review, and so far, it has been well received by the community and decision makers.

Equity Approach: Reduced context-based minimum lot sizes, New limits on house size but allow more smaller houses per lot, Introduced Clusters and Cottage-Courts



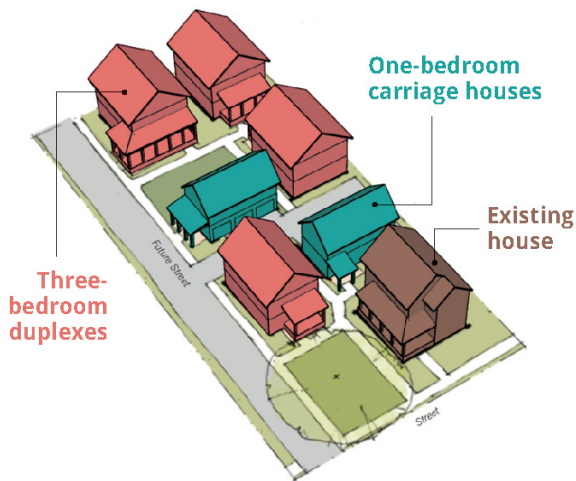
REFERENCE - BLUEPRINT DENVER

Caryn Champine, Department Head of Planning,
Development, and Transportation (formerly with
City and County of Denver)
970-221-6765
cchampine@fcgov.com

Key Project Staff: Peter Park and Samantha Suter

Blueprint Denver Update

Peter Park served as an advisor to the Denver Community Planning and Development Department on the 2019 Blueprint Denver Update, and Samantha Suter was on the consultant team leading the effort, while working for another firm. Taken together, the updated Denver Zoning Code that Peter led as Planning Director, and the 2019 Blueprint Denver Update, are exemplary demonstrations of how an improved code can facilitate and inform better planning. For example, the Code's Form-based and Context-based organizing structure carry through in the organization and terminology used in the Blueprint Denver update. This alignment strengthens the nexus between Denver's planning efforts and implementation outcomes.



REFERENCE - COTTAGE CLUSTER

City of Milwaukie OR

Leila Aman, Community Development Director
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Key Project Staff: Alex Joyce (Project Manager)
Victor Tran (Analyst)

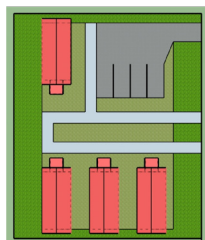
As the owner enters on the size spectrum, smaller sites come with a lower acquisition cost, meaning that a lower total number of units must be built before the site cost is paid back. However, the number of units required to achieve a feasible development is not legal on these sites.



LESSON 2

Small sites are limited by density limits.

Building a sufficient number of units on a smaller site would result in a number of units per acre that exceeds the allowable densities for those zones. Indeed, on a certain number of smaller sites, there simply is not enough room on the site to accommodate all of the setbacks required by the combination of the base zoning and the cottage cluster codes.



REFERENCE - PARK CITY

City of Park City

Hannah Tyler, Senior Planner
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Key Project Staff: Alex Joyce (Principal-in-charge), Victor Tran (Financial Modeling & Graphic Production)

Cottage Cluster Feasibility Analysis

Equity Approach: Cascadia Partners led a multi-disciplinary team that analyzed the City of Milwaukie, Oregon's existing cottage cluster code and developed a set of recommended amendments to improve the financial feasibility of development and to deepen potential affordability of the housing units.

Though the City had adopted code provisions specific to cottage cluster housing, no developments had been proposed. Cascadia Partners outlined a community engagement strategy, facilitated meetings with a stakeholder advisory group, and organized public open houses to solicit input. Then the firm performed a detailed audit of the existing cottage cluster code by gathering relevant market data, estimating potential financial returns, and identifying code standards that negatively impacted financial feasibility.

In order to facilitate discussion of code updates, Cascadia Partners coordinated work with a team of designers to produce conceptual site designs for four specific properties. Using the lessons from these site designs and input from the community, Cascadia Partners drafted proposed new development and design standards to replace the existing code.

The project culminated in a final report which documented the code analysis, feasibility testing, site design concepts, and recommended code updates in an accessible and visually engaging manner. The study was well-received by the City Council and the City plans to adopt the code updates in 2021.

Park City Affordable Housing Code Audit

Equity Approach: Park City hired Cascadia to complete a comprehensive audit of their **affordable housing density bonus program**. The goal of the project was to develop a market-feasible affordable housing density bonus program. State law in Utah prohibits many of the tools for affordable housing that are available in other states, which limits communities to incentives-based approaches. The bonus program covered the entire city and applied to all 12-unit and larger projects. The program overlays and interacts with a parcel's underlying base zone, resulting in a complex and unpredictable set of outcomes in different parts of the city, so extensive testing in multiple zones and contexts was required to fully understand the issues and test the proposed recommendations.

The bonus program was not calibrated with the local market and, in fact, resulted in a far less financially feasible development with the bonus units than without; the result is that it had never been used. Our comprehensive assessment uncovered several parts of the policy that were infeasible, such as effective open space requirements as high as 70 percent, higher parking ratios than the base zone and micro-units as the only physically possible outcome in a market with no demand for micro-units. The project involved facilitation of six stakeholder meetings, market analysis, extensive pro forma modeling of existing and recommended policy standards, and public hearing presentations to Planning Commission and City Council.



REFERENCE - FORT COLLINS

City of Fort Collins
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Key Project Staff: Samantha Suter (of MUD,
while working for another firm)



REFERENCE - CHERRY CREEK

City and County of Denver
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Key Project Staff: Samantha Suter (MUD)

Fort Collins City Plan - Priority Placetypes

While working for another firm, Samantha led a team in creating the Priority Place Types, as part of Fort Collins's comprehensive plan update. Her work for each place type included a growth strategy, built form analysis, land use and housing recommendations, mobility options, and key considerations.

Samantha's analysis illustrated how each area can evolve over time in a way that enhances community values, and her illustrations were central to building the community's understanding and support of the place types.

Equity Approach: City Plan's Priority Place Types include Mixed-Neighborhoods, Neighborhood Mixed-Use, Suburban Mixed-Use, Urban Mixed-Use, and Mixed Employment. The plan identified the value in diversifying housing options and acknowledged that changes to zoning must be made in order to realize the desired neighborhood outcome. Other plan recommendations included evolving activity centers to more urban, walkable, and mixed use places, and away from auto-centric and resource intensive areas. Much of the urban design work consisted of reduce surface parking lots developing context sensitive transitions from higher intensity areas of change to stable, lower density residential areas.

Cherry Creek North Zoning

The Cherry Creek North Zoning Amendment was developed over more than a year with an all-volunteer technical task force to shape evolving residential mixed-use main street area. Samantha was on a team that led the task force through a series of decisions to craft new, custom zoning in order to enhance the live-work-play nature of Cherry Creek. As part of this effort, Samantha developed Denver's first "incentive building form" in the Open Space Building Form, which allowed a density bonus in exchange for street level, publicly accessible, private open space. Samantha also developed Denver's Upper Story Mass Reduction building standard.

Samantha's illustrations, animations, and presentations resulted in a unanimously adopted zoning amendment, and elected officials and task force members credited her visualizations for the group's consensus. Specific urban design work included building sketchup models to test shadow impacts, develop concepts, and illustrate trade offs. As Denver's first custom zone district after the Denver Zoning Code Update (led by Peter Park), Cherry Creek has become the standard for zoning amendments throughout the City and County of Denver and it set the bar for zoning that is rooted in strong urban design and market analysis.

The code improvements continue to guide the evolution of Cherry Creek's walkable mixed-use main streets into an even more vital and successful district for residents, workers, and visitors.

Form-Based Codes 101: Citywide and Countywide Code Updates

The final course in the "Form-Based Codes 101" series explores citywide form-based coding—the assessment of an entire city to determine where form-based code application should occur.

59 Mins Published 2015



Lisa Wise



Daniel Parolek



Mary Madden



Peter Park



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The final course in the "Form-Based Codes 101" series explores citywide form-based coding—the assessment of an entire city to determine where form-based code application should occur.

AICP CM

This course is approved for 1 AICP CM credit.

Form-Based Codes Institute (FBCI) Resource Council Member

Peter serves on the FBCI Resource Council and teaches advanced FBC301 courses focused on implementation and administration of form-based codes. The Form-Based Codes Institute, a program of Smart Growth America, is a professional organization dedicated to advancing the understanding and use of form-based codes. FBCI develops standards for form-based codes; provides educational courses, workshops and webinars; and creates a forum for discussion and advancement of form-based codes.

Equity Approach: Peter is the Chair of the 2021 Driehaus Form-based Codes Awards jury, and Samantha also served on the jury. This year, in addition to recognizing highest achievements in the writing and implementation of form-based codes, the awards program will place specific emphasis on seeking codes that are exemplary in how they are informed by and address social equity.

Types of ADUs

You can find the specific Design Standards in this ADU toolkit on the corresponding pages to each type of ADU. The ADU Standards by Type pages highlights the criteria for design, construction, and development standards.



Detached

Detached ADUs are free-standing buildings that are unattached to a proposed or existing primary dwelling with full amenities for the resident.

Conversion ADUs are built by converting an existing space of a single-family or multi-family residence (e.g., a garage, pool house, or basement).



Junior ADU's (JADU's)

Junior ADUs are a type of conversion ADU that convert no more than 500 sq. ft. of existing square footage of a single-family home.



Addition

Addition ADUs are new construction units and must share at least one wall with the proposed or existing primary dwelling.

ADU Toolkit

Equity Approach: Samantha was hired to develop an ADU Toolkit, as part of a Development Handbook Series, for the City of Milpitas. In 2020, California passed an "ADU law" meant to expedite production of ADUs, as a means to combat the state housing crisis. Metta Urban Design was hired to create a series of "user guides" that explain the new ADU ordinance, including standards specific to Detached, Attached, Converted, and Junior ADUs. Standards include maximum building footprint, minimum setbacks, maximum heights, parking and design standards, including screening requirements, site circulation, and consistency of materials.

The toolkit will be available as a downloadable pdf and a custom project website, and is expected to be launched summer 2021.

REFERENCE - ADU TOOLKIT

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Key Project Staff: Samantha Suter (MUD)

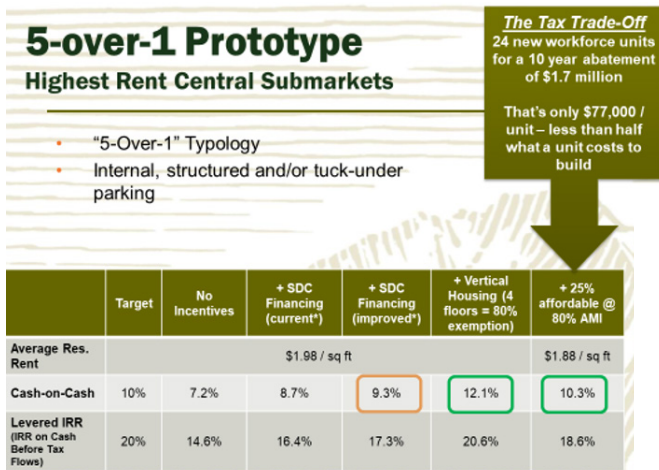


REFERENCE - WYOMING HOUSING TOOLKIT

Client: Wyoming Business Council
 Contact: Kim Porter, Community Initiatives Director
 | 214 W. 15th Street, Cheyenne, WY 82002 |
 307.777.5812 | kim.porter@wyo.gov
 Year Completed: 2020
 Key Project Staff: Alex Joyce (Principal-in-charge) |
 Jamin Kimmell (Project Manager)

Aligning Zoning Code with Housing Goals: A Toolkit for Wyoming Communities

Cascadia Partners worked with nonprofit planning firm Community Builders to create a best practices guide and toolkit to help jurisdictions in Wyoming audit and update their residential zoning. The guide focused on middle housing in single-family neighborhoods, reviewing the strengths, challenges, and contextual considerations for each middle housing type. Jamin was the lead author of the best practice guidelines. He identified common flaws in zoning for middle housing across nine topics, ranging from density to review procedures and suggested best practice code standards to remove barriers to middle housing, produce more compatible infill, and deliver affordable units. Cascadia Partners also produced a step-by-step guide for auditing residential zones and an intuitive, Excel-based tool for performing a quantitative and financial analysis of zoning standards. The toolkit is being promoted by the Wyoming Department of Commerce and distributed to jurisdictions across the state.



REFERENCE - BEND

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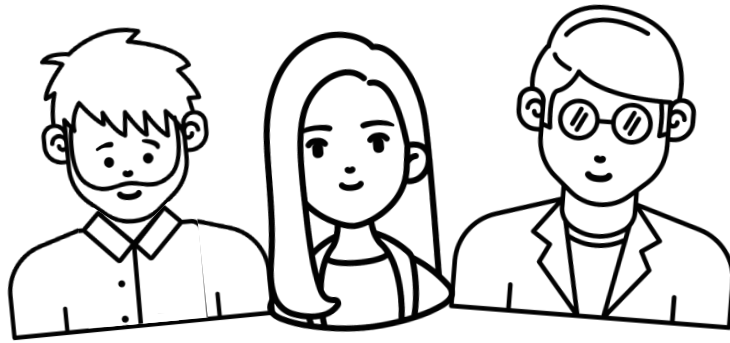
Key Project Staff: Alex Joyce (Project Manager),
 Victor Tran (Financial Analyst)

Bend Core Area Plan Code and Incentives Audit

Following a successful adoption of their Urban Growth Boundary (UGB) Plan, the City of Bend focused on creating a detailed implementation plan for the Core Area which encompasses most of central Bend outside of downtown. Cascadia led a comprehensive zoning code audit and the creation of several new development incentive programs to jumpstart investment in the area. The code audit included a pro forma-based assessment of the current code standards and a highly-visual comparative assessment of existing code to national best practice for a mixed-use district.

Equity Approach: Using our pro forma + Sketchup tool, we were able to quickly communicate key problems but also quantify those issues in terms of return rates, rents, and levels of affordability. The project involved participation in a public open house, facilitating eight stakeholder meetings, five presentations to a City-appointed advisory board, and one presentation to City Council. The zoning code changes were supported by a majority of City Council and they were adopted in 2020.

**We look forward to hearing from you.
Let's get to work!**



– JAMIN, SAM & PETER

