

**CITY COUNCIL AGENDA ITEM**  
CITY OF SHORELINE, WASHINGTON

<b>AGENDA TITLE:</b>	Authorize City Manager to Approve a Contract with OTAK, Inc. for 145 <sup>th</sup> Street Station Subarea Plan
<b>DEPARTMENT:</b>	Planning & Community Development
<b>PRESENTED BY:</b>	Miranda Redinger, Senior Planner Rachael Markle, AICP, P&CD Director
<b>ACTION:</b>	<input type="checkbox"/> Ordinance <input type="checkbox"/> Resolution <input checked="" type="checkbox"/> Motion <input type="checkbox"/> Discussion <input type="checkbox"/> Public Hearing

**PROBLEM/ISSUE STATEMENT:**

Staff is requesting Council to authorize the City Manager to execute a contract with OTAK, Inc. for the development of the 145<sup>th</sup> Street Light Rail Station Subarea Plan in the amount of \$183,000. OTAK will assist the City with several facets of station area planning, including public participation, land use changes over the life of the plan, creating connections to and from the future light rail station, creating effective transitions to the residential neighborhoods that surround the station, and analyzing the environmental impacts. The Subarea Plan will also articulate strategies for implementation, including prioritized capital projects and a Planned Action Ordinance. Adoption of the plan will amend Comprehensive Plan Land Use and Zoning Designations and Development Code Regulations. There will be opportunities for public involvement at every stage of the process.

**RESOURCE/FINANCIAL IMPACT:**

The proposed contract cost for the 145<sup>th</sup> Street Station Subarea Plan (145SSSP) is \$183,000. The 2014 budget includes \$180,000 for this subarea planning process. The additional \$3,000 would be paid using existing funds from the 185<sup>th</sup> Street Station Subarea Plan.

**RECOMMENDATION**

Staff recommends that Council move to authorize the City Manager to execute a contract with OTAK, Inc. in the amount of \$183,000 for the development of the 145<sup>th</sup> Street Station Subarea Plan.

Approved By:            City Manager **DT**    City Attorney **IS**

## **BACKGROUND**

At a joint Dinner Meeting on May 12, the Planning Commission and City Council discussed the upcoming 145SSSP process. The staff report is available at the following link:

<http://cosweb.ci.shoreline.wa.us/uploads/attachments/cck/council/dinner/051214Dinner.pdf>.

Attachment A to the May 12 staff report outlines a schedule for development of the 145SSSP, which roughly mirrors the process for the 185<sup>th</sup> Street Station Subarea Plan. Similarities include:

- Design workshops to begin the process and a community meeting on June 12;
- Building computer models and zoning scenarios based on this input and the Market Assessment;
- Presenting these scenarios to Council and the public in Sept. design workshops;
- Performing a Draft Environmental Impact Statement;
- Selection of a Preferred Alternative by Council, upon which additional analysis will be performed;
- Drafting the Subarea Plan and Planned Action Ordinance; and
- Adoption process to amend the Comprehensive Plan, zoning designations, and development regulations.

A few differences include a market analysis that will be performed by Leland Consulting instead of BAE Urban Economics, and the scope includes Leland's participation in a Council retreat or other briefing. Another difference is a restructured approach to the Design Dialogue Workshops, with EnviroIssues taking a greater role in creating "meetings in a box" to take to stakeholder groups who may be unavailable to come to meetings at City Hall, and other innovative ways to encourage public participation through summer festivals like Celebrate Shoreline.

## **DISCUSSION**

The City published a standard Request for Proposal (RFP) for the 145SSSP, for which three firms submitted proposals. Following an interview process, staff selected OTAK, Inc. as the preferred provider for award of the contract for the 145<sup>th</sup> Street Station Subarea Plan. The scope submitted by OTAK and included as Attachment A, contains a thorough description of how they will fulfill tasks outlined in the RFP, including deliverables and a schedule that demonstrate how to meet the City's high expectations for public involvement, quality graphics, expert technical analysis, and good communication with project managers.

The RFP specified that the scope for the 145SSSP would include an analysis of District Energy (DE). As Council may recall, DE is a system for distributing heat generated in a centralized location for residential and commercial heating requirements. There are degrees to which this technology can be implemented, including Combined Heat and Power (CHP) systems at a scale that can range from a single building or block to a larger district. For more information about DE and CHP, visit:

<http://www.districtenergy.org/what-is-district-energy>.

The scope of work submitted by OTAK (Attachment A) outlines two possibilities for DE. Option A includes a general analysis with a process for implementing DE, examples of supporting densities that are typically needed for DE, and case studies of similar systems. Option B includes a more detailed level of analysis of the subarea, extending slightly beyond the bounds of the study area to examine DE potential along a greater length of NE 145<sup>th</sup> Street, and possibly including the Aurora Corridor. This pre-feasibility analysis for the station subarea and surroundings would be similar to the depth of analysis that was completed for the Overlake Village Station Area in Redmond, and would examine the potential for DE and present the business case for implementation within the station subarea context.

In addition to the items included in Option A, elements that would be addressed in Option B include DE system options and ownership structures, the DE value proposition, and a presentation to City staff and/or Council. Staff's recommendation is to award the contract, including Option B, in the amount of \$183,000. If Council would prefer the higher-level analysis described in the scope under Option A, this item would need to be pulled off of the consent calendar in order to provide the City Manager with that direction.

Under either scenario, Tom Puttman, a well-respected pioneer in the field of DE, would perform the analysis as a sub-consultant to OTAK. This additional work represents a cost of \$8,000 more than was advertised in the RFP, but there is an additional \$5,000 in the line item approved by Council for the project that could be used. The remaining \$3,000 would come from the 185<sup>th</sup> Street Station Subarea Plan account, which included contingency funds for things like mailings and additional analysis.

Regardless of the DE analysis option chosen, some funds for the 145SSSP would need to be carried over into 2015, as the process is anticipated for completion upon adoption of the subarea plan and Planned Action EIS Ordinance in spring or summer 2015. Staff has discussed this end date with Sound Transit with regard to their New Starts grant application, and Sound Transit is confident that the proposed timeline will complement their process.

### **RESOURCE/FINANCIAL IMPACT**

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### **RECOMMENDATION**

Staff recommends that Council move to authorize the City Manager to execute a contract with OTAK, Inc. in the amount of \$183,000 for the development of the 145<sup>th</sup> Street Station Subarea Plan.

### **ATTACHMENTS**

Attachment A: OTAK Proposed Scope of Work for 145<sup>th</sup> Street Station Subarea Plan

# ATTACHMENT A: 145<sup>TH</sup> STREET LIGHT RAIL STATION SUBAREA PLAN

*For the City of Shoreline*

## Scope of Work

May 7, 2014

The Otak Team's scope of work for completion of the specific tasks for the 145<sup>th</sup> Street Station Subarea Plan is presented below.

### Task 1—Project Management and Coordination

Strong communications, as well as diligent and proactive project management will continue to be important to the success of the planning process. Effective project management starts with the development of a work plan for the team that clearly describes scope, schedule, level of effort expectations, deliverables (and milestone dates for delivery), roles and responsibilities of team members, and communication protocols. The work plan then becomes an important *touchstone* for the team throughout the planning process, with weekly monitoring of status on each task.

The project manager will need to effectively coordinate multiple concurrent tasks and cross-disciplinary work efforts of the team. On an on-going basis, our project manager, Mandi Roberts, will be responsible for producing and delivering high quality products, meeting the agreed-upon schedule and budget expectations, and managing subconsultants. The project manager will ensure that the City receives reports and other defined deliverables in draft form with sufficient time for review before the final product is presented to the public. The project manager also will work closely with City staff to ensure that the City is included in all aspects of the plan. Monthly invoices will be accompanied by project progress reports recapping work performed during the billing cycle and describing upcoming work to be completed.

Through regular communications and meetings, we will continue to foster an open and collaborative environment for communication and information sharing is also important to our philosophy for successful project management.

### Deliverables:

- ✓ Project work plan and schedule updated on a monthly basis
- ✓ Kick-off meetings with the City's core team, Sound Transit, 145SCC, and internally
- ✓ Setting up a file-sharing venue for the team's use in sharing resources, background documents, etc.
- ✓ Monthly project status reports and check-in meetings (in person) with the City's co-project managers
- ✓ Regular contact with the City's co-project managers (combination of phone calls and email)
- ✓ Regular (weekly) meetings (some in-person/some phone conferences) with the City's project management team
- ✓ Meeting agendas and summary notes for all meetings

### Task 2—Environmental Documentation Preparation (Draft Environmental Impact Statement and Final Environmental Impact Statement)

Our team will leverage existing and recently completed environmental documents to support the environmental review for the 145<sup>th</sup> Street Station Light Rail Station Subarea Plan. The Lynnwood Link Extension Draft Environmental Impact Statement (DEIS/Draft EIS), as well as the City's Comprehensive Plan and other documents will supply some content for the planned action DEIS to be completed for the 145<sup>th</sup> Street Station Subarea Plan.

Otak's interdisciplinary expertise will enable efficient development of the DEIS. With our science and engineering expertise, we can cover the utilities, stormwater, habitat, wetlands, and stream corridor analysis aspects of the project in-house. In addition, the expertise of team members Fehr & Peers will support us with transportation impact analysis, integrating the MXD tool to accurately

assess vehicle trip generation of mixed-use transit-oriented development, an important aspect of their methodology. For example, on station area analysis for a Seattle project, their analysis demonstrated that increased trip generation from the proposed plan was less than non-TOD. For the 145<sup>th</sup> Street Station Subarea Plan, we will evaluate the anticipated changes in transportation impacts from the proposed station subarea plan, factoring in analysis from other recent documents (Lynnwood Link DEIS, City's TMP, etc.) to narrowly focus on specific issues that could lead to adverse transportation impacts.

Our team also brings the expertise to complete environmental analysis and address other potential impacts related to land use, housing, parks and recreation, fish/wildlife and habitat areas, utilities and energy, stormwater management, and public services/schools. Leland Consulting Group's work on the market assessment will be integrated into the DEIS, and EnviroIssues will help to support the public involvement steps required for the DEIS and planned action review and adoption.

#### **Deliverables:**

- ✓ SEPA scoping as part of second public workshop series
- ✓ Annotated outline for DEIS describing elements to be included in environmental documentation
- ✓ Technical memorandum summarizing alternatives to be analyzed and related environmental analysis requirements, as well as needed data and information sources (Lynnwood Link DEIS, TMP, Comprehensive Plan, etc.)
- ✓ Preliminary DEIS for City and partners review
- ✓ Draft EIS for public review
- ✓ Assistance during the public review process
- ✓ Coordinate with City staff to prepare responses to DEIS comments
- ✓ Final EIS and support to the City for planned action documents

#### **Task 3—Public Participation in Station Subarea Planning and Ongoing Community Outreach**

Our team will provide strategic engagement and outreach services to the City supporting public

participation in the station subarea plan. With EnviroIssues as a key subconsultant for this task, we will serve as an extension of City staff and tailor our efforts to fit the ongoing needs of the project.

We will update the existing Public and Stakeholder Involvement Plan, which provides a broad framework for engagement activities during the 185<sup>th</sup> and 145<sup>th</sup> Street station subarea planning processes. In addition to this overall guiding document, supplemental activities are anticipated for the 145<sup>th</sup> project over the course of the spring, summer, and fall of 2014. Our team (Otak and EnviroIssues) will coordinate with the City to document these potential activities and provide up to three memorandums of recommendations for implementing outreach efforts by phase.

We will provide strategic support to the City by making recommendations regarding the type, timing and structure of outreach activities for the first workshop in June 2014 that is part of the 145<sup>th</sup> Street station subarea planning process, as well as other key public input and City decision points that follow. These guiding memorandums will serve as supplements to the Public and Stakeholder Participation Plan. The project lead from EnviroIssues will participate in various coordination meetings and phone conferences during the time period leading up to the first workshop series and related to defining and implementing supplemental activities in the coming months. We anticipate the following key areas of support:

- Approximately monthly coordination meetings with City staff related to outreach (where possible, these will be combined with regular check-in meetings covered under Task 1)
- Confirming and updating the Public and Stakeholder Involvement Plan already developed for station subarea planning to ensure that key messages, tools, and activities relevant to the 145<sup>th</sup> Street station subarea are fully addressed
- Supporting two design workshop series with key stakeholder groups (such as 145SCC and others) and the community-at-large and preparing workshop summary reports (the first workshop series is planned for June

2014 and the second workshop series will occur in September 2014; these will be interactive workshops that establish a dialogue with participants and gain their input on the following:

- Workshop Series 1: key opportunities and challenges for the 145<sup>th</sup> station subarea
- Workshop Series 2: design possibilities and concepts for the 145<sup>th</sup> station subarea and integration of SEPA scoping
- Providing ongoing graphic support, updates and production of tour maps, and development of products for either online or print use (such as information sheets, meeting invitations, etc.)
- Coordination with Sound Transit and other key stakeholders and partners during the planning process
- Supporting presentations to special interest groups, as well as Planning Commission and City Council with presentation materials, displays, and other information
- Facilitating an open house public meeting as part of the DEIS public comment period, where the range of alternatives will be presented for comment
- Providing ongoing advisory input on public involvement and outreach strategies and activities
- Compiling the project record of public involvement and outreach activities (final public participation report) as an appendix to the station subarea plan and to support the DEIS

#### **Development of Outreach Materials**

This effort will start with crafting and establishing key project messages about the 145<sup>th</sup> Street subarea planning process, and develop a strategy for and content of supportive outreach materials such as a briefing packet and/or presentation (i.e. “meeting in a box”), and informational displays or infographics to have at community events.

#### **Outreach and Facilitation Support**

Our team will provide ongoing support to outreach and facilitation efforts throughout the planning process, including outreach at fairs and festivals, stakeholder briefings and interviews, and design workshops at key subarea planning and SEPA/EIS milestones.

#### **Workshop Summary Reports and Overall Engagement Report**

We will prepare summary reports for the two design workshop series, as well as an overall Public and Stakeholder Engagement Report for the 145<sup>th</sup> Street station subarea planning process, which will summarize engagement activities completed and input received from participants. The document will also serve as an archive of materials developed and note how public input was used to influence the final subarea plan.

#### ***Deliverables:***

- ✓ Monthly coordination meetings with City staff related to outreach (where possible, these will be combined with regular check-in meetings covered under Task 1)
- ✓ Updated public participation plan
- ✓ Up to three (3) memorandums providing recommendations and guidance for supplemental implementation activities for engaging the community and stakeholders in the Exploratory, Analysis and Adoption phases of the 145<sup>th</sup> Street station subarea planning process
- ✓ Recommendations on key messages and materials for the “meeting in a box” for each outreach phase, including infographics and presentation materials that can be used by the City and members of the Otak Team for outreach and engagement activities
- ✓ Support/facilitation at up to five (5) special community events or briefings and documentation of results
- ✓ Draft and final outreach (print and online) materials (mailings, tour maps, flyers, displays, information sheets, hand-outs and materials for workshops and stakeholder meetings, etc.)
- ✓ Input on the EIS notification process

- ✓ SEPA scoping framework
- ✓ Support to City staff in coordination and facilitation of public workshops and meetings
- ✓ Workshop planning materials, hand-outs, boards, and presentation materials, including sketch-up models and illustrations depicting alternatives and design concepts
- ✓ Full public outreach report documenting all activities and public comment and input
- ✓ Specific outreach to persons of modest means and diverse ethnic and cultural backgrounds

#### **Task 4—Existing Conditions Data Collection and Analysis**

The Otak team will collect data and information and review existing and planned conditions within the station subarea including the land use and transportation study areas and along major connecting corridors. This review will address land uses, property development and ownership patterns, transportation, utilities and infrastructure, natural features such as streams, wetlands, and topography, and parks, open space and recreation facilities.

We will gather information from a variety of sources including City GIS inventory as well as other plans, studies, and environmental documents. We will also conduct field reconnaissance to confirm existing conditions. Our team is already familiar with station subarea and with many of the documents that contain existing conditions data, including the Growing Transit Communities Existing Conditions Report, the City of Shoreline 2011 Transportation Master Plan, the Subarea Plan documents for Town Center and North City, the City’s Comprehensive Plan, and other plans, studies, and information. These documents generally have the information necessary to describe the existing conditions in the station subarea and surrounding context. We will compile and summarize this data into a succinct and graphical form.

We will review existing land uses, property development, ownership patterns, transportation facilities, utilities, and natural features such as streams, wetlands, and topography in the 145<sup>th</sup>

Street station subarea/study areas. Review results will be used in preparing the Draft EIS. The following are anticipated existing conditions collection and analysis activities:

- Perform field reconnaissance from public right-of-way to become familiar with the area;
- Review applicable City of Shoreline GIS information for critical areas and topography;
- Review existing applicable City of Shoreline Technical Reports as available (streams and wetland inventory reports, basin plans, geotechnical reports, and other information to be made available by the City
- Review existing Sound Transit Existing Conditions Reports and DEIS as well as additional information prepared by Sound Transit as it becomes available;
- Review Sound Transit, Transit Oriented Development (TOD) Potential Report;
- Review Market Analysis completed by Kidder Mathews for Sound Transit;
- Review PSRC Growing Transit Communities Existing Conditions Reports for the 145<sup>th</sup> Street station subarea; and
- Review reports for the 185<sup>th</sup> Street station subarea, including the Market Assessment.

#### ***Deliverables:***

- ✓ Existing and planned conditions summary including opportunities and challenges analysis through a series of layered graphic maps, annotated, and prepared as hand-outs and displays for meetings and workshops (building on work already completed by Sound Transit in their DEIS; please note that written and graphic documentation of existing and planned conditions also will be integrated into the DEIS and subarea plan)

### **Task 5—Market Research and Analysis**

This task will include Analysis of Property Values and Fiscal Conditions and leverage the work of Kidder Mathews as part of the Lynnwood Link DEIS to provide a focused market analysis for the station area with the objective of identifying key development sites and redevelopment opportunities.

Specific economic factors and trends to be evaluated include:

- Recent development trends (pricing, new construction activity, absorption) in the region and within and near the station area
- Key opportunities and challenges found in residential and job-producing (office, retail, and other commercial) land uses in the short- and long-term
- Qualitative analysis of comparative economic opportunities and challenges associated with freeway-side light rail station areas in other regions (such as Denver, Portland, Los Angeles, Minneapolis, Atlanta, Washington DC, and/or other areas)
- General development conditions within and near the station area and consideration of factors such as recent development activity, land availability, accessibility, and amenities
- Assessor’s parcel data in order to identify improvements to land value ratios and opportunities for generating additional tax revenues through new development

#### **Deliverables:**

- ✓ Focused draft and final technical memorandums summarizing key findings and providing guidance and recommendations on short-, medium-, and long-term development strategies for the entire study area, as well as for catalytic opportunity sites within and in proximity to the station area; will include an estimate of the economic benefits and fiscal revenues associated with the identified priority development sites within the station area (final content will be integrated into the station subarea plan and EIS as appropriate)

- ✓ Trips and Participation in Workshops: LCG will travel to Shoreline three times during the planning process to participate in workshop activities and present information; this could include presenting potential market opportunities and challenges to the developers workgroup and other stakeholder groups at Workshop #1; participating in a retreat with City Council; and presenting key findings and recommendations of the market analysis/assessment at Workshop #2 (The timing and purpose of these trips will be coordinated with the City project management team.)

### **Task 6—Potential Land Use Changes Around the Station and Along Major Corridors**

Working collaboratively with City staff, we will identify potential opportunities for land use change in the station subarea and along major corridors between activity nodes (N/NE 145<sup>th</sup> Street, 5<sup>th</sup> Avenue NE, 8<sup>th</sup> Avenue NE, 10<sup>th</sup>, 12<sup>th</sup>, and 15<sup>th</sup> Avenues NE, 1<sup>st</sup> Avenue NE, Corliss Avenue, Meridian Avenue and potentially others).

The analysis and evaluation of the subarea will include existing and proposed land uses; opportunities for non-motorized and transit connections between commercial corridors on Aurora Avenue N and 15<sup>th</sup> Avenue NE, Ridgecrest, and other population centers; transitions between uses of various intensities; traffic and parking impacts; and restoration opportunities for natural areas in the vicinity.

We will work with the City’s transportation planners and reference the forthcoming Transit Integration Plan to identify potential deficiencies and opportunities to improve local transit and nonmotorized connections between the station area and other major activity centers. Through our team members’ work with King County Metro on the Nonmotorized Access Study, we have already developed a sophisticated and automated GIS process to evaluate connectivity gaps and suggest improvements. This process will work well in the 145<sup>th</sup> Street station area.

We will also work with City Transportation Planners, Traffic Engineers, and stakeholders from adjacent



jurisdictions with regard to the 145<sup>th</sup> Street Route Development Plan to evaluate potential traffic and parking impacts associated with the land use changes. The MXD tool is well-suited to more accurately estimate the vehicle trip generation of different land use plans within and around the station area. Our team members have developed an interactive interface for MXD that can be used in a workshop with City staff or even a public meeting to show how different land use patterns and intensities impact vehicle trip generation and thus traffic impacts. Our team has extensive experience integrating MXD with travel demand forecasting models across the region and throughout the country. This MXD and travel model integration allows for near- and long-term evaluations of potential traffic impacts using a more accurate trip generation methodology.

The MXD tool also includes a shared parking component that can be used to assess onsite parking demands, ensuring that the uses within the station area and along the major corridors have adequate parking supply. Based on our experience in other station area plans, the parking analysis will also include an assessment of parking spillover into the adjacent neighborhoods. For example, our team's work on station area plans in Seattle and Los Angeles assessed the potential parking spillover impacts and included a parking management strategy as part of the station area plans.

#### **Deliverables:**

- ✓ Technical memorandum (draft) summarizing potential changes in land use and transportation in the subarea, at opportunity sites, and along major corridors including outside the study area if opportunities arise. Our team will work with staff to develop zoning alternatives, ranging from "no action" to higher level degrees of growth, which will be analyzed as part of the DEIS; final content will be integrated into the station subarea plan (Transportation related analysis will occur at a general level as part of this task, and at a more detailed level under Tasks 7 and 8.)

#### **Task 7—Opportunities, Challenges, and Alternatives Analysis**

We will identify and document key opportunities and challenges, including alternative strategies and policy direction to address the key components of station area planning, including the following, and others that may emerge during the planning process:

- Increase safety, quality, and availability of public facilities for nonmotorized access to and from the station; this analysis also will include possibilities for taking bicycle/pedestrian traffic off 145<sup>th</sup> and creating a parallel trail at 147<sup>th</sup>, which could include a bicycle/pedestrian bridge across the interstate;
- Encourage and mandate development within the station area to incorporate facilities to provide and enhance walking and bicycling as a means to reach the station;
- Enhance transit between the station and adjacent neighborhoods;
- Include an analysis of potential bus transit needs and plans for integrating bus transit to the light rail station subarea;
- Provide details for implementing light rail station goals and policies and zoning strategies in the vicinity of the 145<sup>th</sup> Street station. Particular attention should be paid to urban design, incorporating neighborhood commercial uses, transition between single-family homes and more intensive land uses, as well as parking strategies for the area around the station, open space, pedestrian amenities, and street design;
- Identify opportunities for placemaking, enhancing neighborhoods and public spaces;
- Identify opportunities and issues related to utilities (primarily water and sewer) both above ground and below ground utilities, including stormwater management and

innovative technologies such as those associated with EcoDistricts and district energy (see more on this below); and

- Identify—quantitatively and qualitatively—opportunities through station subarea planning to reduce per capita vehicle miles traveled and transportation related greenhouse gas emissions within the half mile radius of the 145<sup>th</sup> Street station.

Additional areas of focus to be provided within this scope of work and within the base budget include the following.

- Parking—Fehr & Peers is one of the nation’s leaders in parking analysis. The MXD tool has an integrated shared parking analysis that will be used to evaluate the parking demand within the station area and on any parcels that may redevelop. In addition, through our experience on other station area plans both locally and nationally, we recognize the importance of a parking impact assessment in the surrounding residential neighborhoods. Our team has developed several parking impact mitigation strategies in similar locations to address parking spillover potential.
- VMT and Greenhouse Gas Emissions Analysis—Our team members have developed analysis guidelines and VMT/GHG reduction programs at a statewide level for Washington, Oregon, and California, as well as for dozens of agencies and jurisdictions. As part of this study, we will place VMT and GHG generation into context first to ensure that the inherent benefits of the station area’s mixed-use TOD are accounted for. This analysis will be done by using MXD combined with the City travel demand forecasting model to quantify the VMT/GHG of typical residences compared to the potential station area residents, as well as other tools and resources. We anticipate that this information will be helpful for integration into the Climate Wedge work being completed separately by Climate Solutions.

- District Energy opportunities—Thomas Puttman, of Puttman Infrastructure, Inc. based in Portland, Oregon, is an expert on district energy implementation and will conduct a preliminary assessment of potential district energy opportunities in the station subarea and along connecting corridors for the project. Tom recently conducted analysis for the Overlake Village station subarea in Redmond, Washington and has implemented district energy systems in communities throughout the US. There are two options for district energy related analysis, Option A and Option B, as described in the attachment to this scope of work. Option A can be provided within the base budget of \$175,000. Option B would require an additional \$8,000 for a total budget of \$183,000. Whichever option is selected, the analysis will be integrated into the station subarea plan. With Option B, there would be an opportunity to further quantify how district energy and to some extent green building approaches could further reduce emissions, which could provide additional justification for regulations and/or incentives as mitigation in the DEIS and as applicable under Living Building Challenge provisions.

***Deliverables:***

- ✓ Documentation of opportunities, challenges, and alternatives prepared and submitted as a separate memorandum (draft) and later integrated into the DEIS and subarea plan

**Task 8—Selection of Preferred Alternative for the Planned Action and Integration into the EIS**

Using the information generated in the prior tasks, as well as feedback from City staff, Planning Commission, City Council, project partners, and the community, we will coordinate the process of evaluating alternatives and identifying a preferred alternative.

Based on the results of Tasks 2 and 7, including the technical analysis and feedback from City Council, Planning Commission, community, and staff, we will

develop the Draft and Final Planned Action EIS and assist staff in preparing a preferred land use and transportation alternative. (Note: the primary DEIS and FEIS production work is budgeted under Task 2; this task covers development and selection of the preferred alternative and any additional analysis that may be needed to support the preferred alternative, integrated into the Final EIS.)

The preferred alternative will include such information as the following:

1. Total number of activity units (housing units and jobs)
2. Urban design concepts for redevelopment (new development, infill, etc.)
3. Street network to support mixed-use development patterns, improve internal circulation and provide access (in coordination with Shoreline Public Works Department)
4. Nonmotorized transportation facilities (in coordination with Shoreline Public Works Department)
5. Transit service needs (in coordination with Shoreline Public Works Department)
6. Parking management and trip reduction strategies (in coordination with Shoreline Public Works Department)
7. Strategies for preserving and creating affordable housing
8. Strategies to promote a variety of housing styles and choices
9. Description of utilities needed to support the preferred alternative (in coordination with the Shoreline Public Works Department and utility providers)
10. Densities required to support investment in district energy.

In addition, we will provide documentation demonstrating how the alternative supports the

goals and vision and addresses existing and future issues identified in previous tasks.

#### ***Deliverables:***

- ✓ Technical memorandum (draft) documenting the preferred land use and transportation alternative, performance measures, and benchmark results; this information also will be integrated into the subarea plan and additional analysis will be conducted to support the preferred alternative and integrated into the Final EIS; memorandum content in final form will be integrated into the station subarea plan (Note: DEIS and FEIS deliverables are listed under Task 2)

#### **Task 9—Station Area Plan**

The 145<sup>th</sup> Street Station Subarea Plan will include the specific content listed in the RFP and serve as a companion document to the DEIS and planned action. We will compile and finalize content as part of other tasks for integration into the plan and prepare an executive summary.

Be assured that our team will produce a high quality plan with excellent technical content, graphics, and illustrations that can be used as a model for future station area planning projects in the City and beyond. For example, we will provide digital 3-D SketchUp model illustrations of the station area alternatives, including the preferred alternative, showing urban form, density, and character. We will provide illustrative design guidelines and example that can be applied to other areas in the city. We will leverage our extensive experience in developing station area and other types of subarea plans, having developed dozens in Washington and throughout the Western US.

The draft and final station subarea plan document will include the following:

- ✓ Executive summary;
- ✓ Individual chapters or appendices that document the products of each of the tasks above;

- ✓ Appropriate land use and zoning designations;
- ✓ Specific design guidelines, possibly including transition standards, form-based residential code language, and tools to promote right-sized parking, commercial and job development, incentives and provisions for affordable housing, a range of housing choices, green building, universal design, public open space and amenities, etc.
- ✓ Implementation actions and strategies, including an incremental strategy for phasing and implementing the subarea plan; this includes a prioritized list of capital improvement projects as well as potential development supported infrastructure projects to support implementation of the subarea plan (We understand that this may interrelate to an LCLIP grant the City has applied for that involves analysis of infrastructure projects and transfer of development rights opportunities, so we anticipate sharing our information and/or having the LCLIP results to help inform our analysis, with cross-synergy between the two efforts.)
- ✓ Digital models, maps, and other graphics to illustrate the preferred alternative of the station subarea plan

**Deliverables:**

- ✓ Preliminary draft, draft and final plan documents (narrative and graphic content), including an executive summary
- ✓ Comment enabled pdf and hard copies will be provided for review of drafts
- ✓ The final plan will be available in pdf/electronic form, as well as printed and on disk (assume 25 printed copies and 25 disk copies)

**Proposed Budget per Task**

Task 1	Project Management and Coordination	\$15,000
Task 2	Environmental Documentation Preparation	\$42,000
Task 3	Public Participation in Station Subarea Planning and Ongoing Community Outreach	\$35,000
Task 4	Data Collection and Existing and Planned Conditions Analysis	\$7,500
Task 5	Market Research and Analysis	\$25,000
Task 6	Potential Land Use Changes	\$4,000
Task 7	Opportunities, Challenges, and Alternatives Analysis	\$15,000
Task 8	Selection of the Preferred Alternative for Planned Action and Integration into the EIS	\$9,500
Task 9	Station Subarea Plan	\$22,000

**Total – All Tasks: \$175,000 (with Option A for district energy analysis—see attached description of Option A.)**

*If Option B for district energy analysis is selected, add \$8,000 to Task 7 and the total project budget would be \$183,000 (see attached description of Option B).*

# ATTACHMENT 1

## DISTRICT ENERGY ANALYSIS— DESCRIPTIONS OF OPTIONS A AND B

### OPTION A

The level of analysis related to district energy potential in the station subarea under Option A will be very general, resulting in a brief memorandum that outlines the following:

- The general process for implementing district energy
- Example supporting densities that are typically needed for district energy
- Case examples of other systems in similar contexts

This work will be completed for approximately \$3,000 within the \$175,000 base budget.

### OPTION B

Option B would include a more detailed level of analysis of the subarea and out to the edges of the subarea for district energy potential (Aurora Corridor options for example). This pre-feasibility analysis for the station subarea and surroundings will be similar in depth to that developed for the Overlake Village Station Area in Redmond and will examine the potential for district energy and the present business case for implementation relevant to the station subarea context. In addition to the items listed in Option A, elements that will be addressed in Option B include district energy system options and ownership structures, the district energy value proposition, and a presentation to City staff. Specific scope elements and steps in the Option B process include the following.

1. Assess District Energy Potential and Develop Value Proposition (including “ripeness of candidate location” and “confirm DE is cheaper than electricity and natural gas” and including analysis of viable

technologies and project implementation opportunities):

- a) Review station subarea development plans to identify development growth and land use types at full build out. Provide analysis for building-scale and district-scale energy estimates for demands, costs, and carbon.
- b) Estimate rough order of magnitude energy demands, costs and carbon emissions based on building-scale energy systems.
- c) Estimate rough order of magnitude energy demands, costs and carbon emissions based on district-scale energy system.
- d) Compare building-scale to district-scale energy system performance and costs. Quantify and depict the “business case” showing the cost savings associated with district energy implementation as well as the reduction in greenhouse gas emissions associated with potential implementation.
- e) Based on energy demands, growth assumptions, and market costs for ground source, electric, and natural gas heating (as identified in items 1.a – 1.c), identify the most viable technology, including primary and secondary energy sources and related needs within individual buildings, sites, and public ROW.
- f) Review planned City capital projects in the area and identify those that could be coupled with preferred locations.

2. Provide Overview of Potential District Energy System Options (including “confirm technology and infrastructure options”): Identify district energy system components and options (including central plant technologies and

distribution infrastructure). Geothermal - Include options for geothermal and assess the benefits of geothermal to the district energy system. Solar Thermal - Include options for geothermal and assess the benefits of geothermal to the district energy system

3. Provide Overview of District Energy Ownership Models (including “overview of ownership models”): Identify potential ownership structures to develop and operated a district energy system at Overlake Village.
4. Describe the Stakeholder Environment (including “potential partners; who needs to be involved”): Identify potential partners and stakeholders to support district energy development in Shoreline.
5. Provide Implementation Recommendations – Timeline : Create timeline and action plan for district energy system implementation, including expected break even timing. Provide recommendations and scope outline for full feasibility study of district energy options. Prepare presentation to City staff (Tom Puttman would travel to Shoreline to present information in person), which also could then be presented to City Council at staff’s discretion.

To complete this level of analysis, an additional \$8,000 would be needed (\$11,000 total), creating the need for a total budget of \$183,000.

## ATTACHMENT 2

### SCHEDULE OF DELIVERABLES

Deliverable	Anticipated Timeframe for Delivery
<b>Task 1—Project Management and Coordination</b>	
Project work plan and schedule	Initial work plan and schedule: at the start of the project; updates to occur on a monthly basis
Kick-off meetings with the City’s Core team, Sound Transit, 145SCC and internally	To occur within 30 days of project start up
File sharing venue for team’s use in sharing resources, background documents, etc.	Within 30 days of project start up
Project status reports and check-in meetings with City’s co-project managers	Status reports (written): monthly Check-in meetings: weekly—some in person and some by phone
Regular contact with the City’s co-project managers (combination of phone calls and emails)	Ongoing basis
Meeting agendas and summary notes for all meetings	Ongoing basis
<b>Task 2—Environmental Documentation Preparation (DEIS and FEIS)</b>	
SEPA scoping support to the City	City to prepare DS and Scoping Notice in advance of the second public workshop series; Otak to support scoping at the public meeting in the second public workshop series
Annotated outline for DEIS describing elements to be included in environmental documentation	Mid-Summer 2014
Technical memorandum summarizing alternatives to be analyzed and related environmental analysis requirements, as well as needed data and information sources (Lynnwood Link DEIS, TMP, Comprehensive Plan, etc.)	Mid-Summer 2014
Preliminary DEIS for City and partners review	Early Fall 2014

Draft EIS for public review	Fall 2014
Assistance during the public review process	Fall 2014
Coordinate with City staff to prepare responses to DEIS comments	Late Fall 2014
Final EIS and support to the City for planned action documents	Early 2015
<b>Task 3—Public Participation in Station Subarea Plan and Ongoing Community Outreach</b>	
Monthly coordination meetings with City staff related to outreach (where possible, these will be combined with regular check-in meetings covered under Task 1)	Ongoing throughout planning process
Updated public participation plan	Within 30 days of project start up
Up to three (3) memorandums providing recommendations and guidance for supplemental implementation activities for engaging the community and stakeholders in the Exploratory, Analysis, and Adoption phases of the 145 <sup>th</sup> Street station subarea planning process	One at start of project focused on Exploratory phase recommendations; one in advance of the Analysis phase; and one in advance of the Adoption phase
Recommendations on key messages and materials for the “meeting in a box” for each outreach phase, including infographics and presentation materials that can be used by the City and members of the Otak Team for outreach and engagement activities	Integrated into memorandums above and as part of meetings with City staff
Specific outreach to persons of modest means and diverse ethnic and cultural backgrounds	Ongoing throughout planning process
Support/facilitation at up to five (5) special community events and briefings and documentation of results	At key points during the planning process with a focus on spring, summer, and fall 2014 community outreach opportunities
Draft and final outreach (print and online) materials (mailings, tour maps, flyers, displays, information sheets, hand-outs, and materials for workshops and stakeholder meetings, etc.)	Ongoing throughout the planning process
Input on the EIS notification process and SEPA scoping framework	Early Summer 2014



Support to City staff in coordination and facilitation of public workshops and meetings	Ongoing throughout the planning process
Workshop planning materials, hand-outs, boards and presentation materials, including sketch-up models and illustrations depicting alternatives and design concepts of alternatives	Prepared in advance of two design workshops, scheduled for June 2014 and September 2014
Full public outreach report documenting all activities and public comment and input	Appendix to the draft and final station subarea plans; to be compiled in early 2015
<b>Task 4—Existing Conditions Data Collection and Analysis</b>	
Existing and planned conditions summary (draft) including opportunities and challenges analysis through a series of layered graphic maps, annotated, and prepared as hand-outs and displays for meetings and workshops (building on work already completed by Sound Transit in their DEIS; please note that written and graphic documentation of existing and planned conditions in final form also will be integrated into the DEIS and subarea plan)	Spring into summer 2014 with initial findings presented at the June design workshop sessions
<b>Task 5—Market Research and Analysis</b>	
Focused draft and final technical memorandums summarizing key findings and providing guidance and recommendations on short-, medium-, and long-term development strategies for the entire study area, as well as for catalytic opportunity sites within and in proximity to the station area; will include an estimate of the economic benefits and fiscal revenues associated with the identified priority development sites within the station area (final content will be integrated into the station subarea plan and EIS as appropriate)	Initial findings related to opportunities and challenges and case study comparisons to be presented at June design workshop sessions  Draft technical memorandum will be prepared and circulated for City review in mid-summer 2014  Final technical memorandum will be completed by the end of summer 2014
Trips and Participation in Workshops: LCG will travel to Shoreline three times during the planning process to participate in workshop activities and present information; this could include presenting potential market opportunities and challenges to the developers workgroup and other stakeholder groups at Workshop #1; participating in a retreat with City Council; and presenting key findings and recommendations of the market analysis/assessment at Workshop #2 (The timing and purpose of these trips will be coordinated with the City project management team.)	To be determined; trips will be timed with selected events; the first trip will occur in conjunction with design workshop series #1 in June 2014 and a developers workgroup session within that timeframe; City Council retreat yet to be scheduled; design workshop series #2 is scheduled for September 2014

**Task 6—Potential Land Use Changes Around the Station and Along Major Corridors**

<p>Technical memorandum (draft) summarizing potential changes in land use and transportation in the subarea, at opportunity sites, and along major corridors including outside the study area if opportunities arise. Our team will work with staff to develop zoning alternatives, ranging from “no action” to higher level degrees of growth, which will be analyzed as part of the DEIS (Transportation related analysis will occur at a general level as part of this task, and at a more detailed level under Tasks 7 and 8.); final content will be integrated into the station subarea plan</p>	<p>Draft memorandum will be prepared after coordination meetings with City staff to determine options for land use changes; this work is scheduled to occur after the first design workshop in June—so early to mid-summer 2014</p>
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**Task 7—Opportunities, Challenges, and Alternatives Analysis**

<p>Documentation of opportunities, challenges, and alternatives prepared and submitted as a separate memorandum (draft) and later integrated into the DEIS and subarea plan</p>	<p>Opportunities and challenges will be evaluated and presented/discussed as part of the June design workshop series; the team will continue with this analysis as alternatives begin to form through mid-summer 2014</p>
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**Task 8—Selection of Preferred Alternative for the Planned Action and Integration into the EIS**

<p>Technical memorandum (draft) documenting the preferred land use and transportation alternative, performance measures, and benchmark results; this information also will be integrated into the subarea plan and additional analysis will be conducted to support the preferred alternative and integrated into the Final EIS; memorandum content in final form will be integrated into the station subarea plan (Note: DEIS and FEIS deliverables are listed under Task 2)</p>	<p>Following the same process as for the 185<sup>th</sup> Street Station Subarea Plan, the City intends to select a preferred/proposed alternative upon completion of the Draft EIS and the public/agency comment period; so this is scheduled to occur in late fall 2014</p>
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**Task 9—Station Area Plan**

<p>Preliminary draft, draft and final plan documents (narrative and graphic content), including an executive summary</p>	<p>The preliminary draft station subarea plan will be compiled by the end of 2014; draft by early 2015; and final with adoption of the Final EIS and Planned Action scheduled for early spring 2015</p>
<p>Comment enabled pdf and hard copies will be provided for review of drafts</p>	<p>With final – early spring 2015</p>
<p>The final plan will be available in pdf/electronic form, as well as printed and on disk (assume 25 printed copies and 25 disk copies)</p>	<p>With final – early spring 2015</p>