AGENDA COVER MEMO

Memorandum Date: September 12, 2023

Order Date: September 26, 2023

TO:	Board of County Commissioners
DEPARTMENT:	Public Works
PRESENTED BY:	Dan Hurley, Public Works Director Keir Miller, Land Management Division Manager
AGENDA ITEM TITLE:	DISCUSSION & ACTION/ In the Matter of Selecting a Consultant to Assess Barriers to Affordable Housing in Lane County

I. MOTION

None. Direction only.

II. AGENDA ITEM SUMMARY

Lane County is facing a severe housing shortage that has increased the cost of housing throughout the County. Lane County intends to conduct a comprehensive review of systems and processes that are within the jurisdiction and control of Lane County to understand what the Lane County Government can do to increase of the availability and affordability of housing in rural Lane County. Staff is seeking direction from the Board in selecting a consultant to perform this review.

III. BACKGROUND/IMPLICATIONS OF ACTION

A. Board Action and Other History

On February 2, 2023, the Board assigned staff to solicit for a consultant to conduct a comprehensive review on barriers to housing that are within the jurisdiction and control of Lane County. Concerns raised by the Board included a lack of affordable housing; a lack of inventory; and the difficulty, cost, and time it takes to obtain approvals and permits under Lane County jurisdiction. The Board wanted an evaluation to determine if Lane County is doing everything legally possible to assist in increasing the stock of affordable housing available in rural Lane County. Commissioner Ceniga and Commissioner Buch agreed to work with staff to develop an appropriate scope of work for a Request for Proposals (RFP).

Commissioner Ceniga and Commissioner Buch met with staff in March 2023 and again in May 2023 to develop the scope of work. In the interest of time, staff issued a Request for Quotes (RFQ) in June 2023 using a clearly defined limited scope of work rather than returning to the Board to review a lengthier RFP as originally requested. The Scope of Work included the following five items:

1. **Conduct a literature review** of background reference studies and other relevant documents/code as necessary to evaluate barriers to affordable housing in Lane County.

2. **Evaluate Land Use Code impediments** at the State and County level that are preventing the efficient use of land within Oregon's Statewide Planning Goals and provide recommendations for potential legislative action that could alleviate barriers to affordable housing.

3. **Evaluate Building Code impediments** at the State and County level that are presenting barriers to affordable housing.

4. **Review processes at Lane County's Land Management Division and Lane Code to answer the following questions:**

    - What processes in Planning and Building Divisions can be improved to speed the delivery and reduce the cost of housing?
    - What substantive standards can be changed for review of housing proposals that will increase production and reduce costs?
    - What Lane Code provisions can be changed to increase housing production and reduce costs?
    - What are the relative priorities for making changes recommended based on the above?

5. **Review the current structure and staffing of Lane County's Land Management Division and evaluate** funding and staffing levels needed to process development applications within established processing timeline benchmarks.

6. **Present findings to the Lane County Board of Commissioners.**

The RFQ closed on June 23, 2023. Two quotes were received prior to the deadline and one was received shortly after the deadline that could not be considered. Commissioner Ceniga and Commissioner Buch met with staff again and decided to reissue the RFQ in an effort to get more proposals. The RFQ closed the second time on July 24, 2023. The County received five quotes ranging from $29,320 to $249,454.

Contractor	Quote
Morant-McLeod	$29,320 (limited interviews, fastest approach) $31,440 (consultant recommended approach) $37,090 (recommended approach + implementation plan)
Office of: Office	$45,165
Kent Howe & Jim Mann	$60,000
Pallet	$202,950
OpX	$249,454

B. Policy Issues

In evaluating a Request for Quotes, Lane County typically selects the lowest priced quote from the vendors deemed qualified to do the work. Lane County may contract based on other criteria deemed to be in the best interest of the County.

C. Board Goals

The Strategic Plan contains the following objective within the "Vibrant Communities" strategic priority:

"Invest in the Land Management Division to ensure adequate and sustainable staffing levels and resources are available to be responsive and agile in meeting current and future housing needs and customer service expectations."

An external review will assist in determining if the Land Management Division is adequately staffed and determine if structural or process changes are needed to support the development of more housing in Lane County.

D. Financial and/or Resource Considerations

The County Administrator intends to fund the review out of the County Administration budget. The Board has delegated contracting authority to the County Administrator for contracts up to $150,000.

E. Health Implications

Housing issues are closely linked to community health due to of the positive effects that available and affordable housing have on human health and well-being. By conducting an external review of policies and structures, the County may be able to improve health outcomes for county residents by identifying barriers to affordable housing and working to address these barriers.

F. Analysis

The quote from Morant-McLeod was the lowest priced quote and the consulting firm appears qualified to do the work. The firm did not describe any local experience, but the firm listed several project examples of similar work for other

public agencies in Oregon, including a Housing & Homeless Strategy for Lincoln County.

The consulting firm with the second lowest price (Office of: Office), listed several example projects related to evaluating housing barriers. However, none of the project examples were from Oregon, and most were specific to Accessory Dwelling Units (ADUs).

The consultants with the third lowest price (Kent Howe & Jim Mann) did not provide previous project examples. The consultants are both former employees from Lane County's Land Management Division, both with extensive background in land use planning and the County's building and land use code.

Two other proposals were significantly higher in price (OpX and Pallet) and did not appear to offer more value.

G. Alternatives/Options

1) Direct staff to award the contract to the respondent providing the lowest priced quote.

2) Direct staff to award a contact based on other criteria deemed in the best interest of Lane County.

3) Direct staff to explore contracting with multiple consultants for specific deliverables in the scope of work.

4) Direct staff to reject the quotes and issue a new RFQ or RFP.

IV. RECOMMENDATION

Staff recommends awarding the contract to respondent providing the lowest priced quote - specifically the middle-priced option provided by Morant-McLeod ($31,440). However, commissioners may find that other consultants warrant further consideration based on local experience or other factors.

V. TIMING/IMPLEMENTATION

If the selected quote is under $50,000 the Director of Public Works will execute a contract with the selected consulting firm and move forward with the work. If the selected quote is over $50,000 and up to $150,000 the County Administrator will execute the contract.

VI. FOLLOW-UP

The selected consultant will complete the review and present findings to the Board in accordance with the scope of work.

VII. ATTACHMENTS

1) Housing Barriers RFQ
2) Quote responses

REQUEST FOR QUOTES

Lane County, Oregon

Analysis on Barriers to Affordable Housing in Lane County

Responses due:
June 23, 2023
(5:00 pm, Pacific Time)

LANE COUNTY OREGON
Public Works Department
3040 N. Delta Hwy
Eugene, Oregon 97408

Contact: Dan Hurley, Lane County Public Works Director
dan.hurley@lanecountyor.gov

Central Source of Information and Details for this RFQ can be found at: www.lanecounty.org/bidrfp

Purpose & Goal of the RFI

Lane County, Oregon, is facing a severe housing shortage that has increased the cost of housing throughout the County. Lane County Government is seeking information from qualified vendors to perform evaluations and analysis on the barriers to affordable housing in Lane County. The goal is to conduct a comprehensive review of systems and processes that are within the jurisdiction and control of Lane County to understand what the Lane County Government can do to increase of the availability and affordability of housing in rural Lane County. Concerns include a lack of housing inventory, the difficulty and cost to build, and the time it takes to obtain approvals and permits under Lane County's jurisdiction. The evaluation should determine if the County is doing everything legally possible to assist homebuilders in the context of applicable laws and regulations. The evaluation should assess what Lane County is doing to support the construction of new housing, how the County is doing, and if there are actions Lane County could be taking to better address this critical issue. Respondents should have expertise in Oregon Land Use Law, Zoning, and Building Codes.

Scope of Work

1. **Conduct a literature review** of background reference studies and other relevant documents/code as necessary to evaluate barriers to affordable housing in Lane County. A starting list of previous studies and actions is linked here. Synthesize the information into a report of no more than 10-pages for delivery the Board of County Commissioners.

2. **Evaluate Land Use Code impediments** at the State and County level that are preventing the efficient use of land within Oregon's Statewide Planning Goals and provide recommendations for potential legislative action that could alleviate barriers to affordable housing.

3. **Evaluate Building Code impediments** at the State and County level that are presenting barriers to affordable housing. Specific emphasis should be placed on barriers to the construction of Accessory Dwelling Units (ADUs) and "Tiny Homes".

4. **Review processes at Lane County's Land Management Division and Lane Code to answer the following questions:**

   - What processes in Planning and Building Divisions can be improved to speed the delivery and reduce the cost of housing?
   - What substantive standards can be changed for review of housing proposals that will increase production and reduce costs?
   - What Lane Code provisions can be changed to increase housing production and reduce costs?
   - What are the relative priorities for making changes recommended based on the above?

   Lane County staff will be available for in-person or virtual meeting interviews as necessary to complete this analysis.

5. **Review the current structure and staffing of Lane County's Land Management Division and evaluate** funding and staffing levels needed to process development applications within established processing timeline benchmarks. Consider new and anticipated legislation (including rules around Accessory Dwelling Units, the Governor's executive order on housing production, HUD funding for rebuilding in the McKenzie Valley, and other relevant drivers.

Lane County staff will be available for in-person or virtual meeting interviews as necessary to complete this analysis.

6. **Present findings to the Lane County Board of Commissioners.** The presentation may be given in-person at the Lane County Public Service Building during a Tuesday Board Meeting to be scheduled. The presentation can also be conducted remotely via Zoom.

Contact Information for the RFQ

From the issue date of this RFQ until the response deadline date, the sole point of contact will be the person identified below. Queries addressed to other employees or representatives of Lane County will be referred to the sole point of contact to ensure uniformity and consistency in responding to interested parties.

Dan Hurley, dan.hurley@lanecountyor.gov
Director of Public Works
3040 N. Delta Hwy
Eugene, Oregon 97408
541-682-6910

Questions and Answers

Please email all questions regarding this RFQ no later than Monday, June 12, 2023, to Dan Hurley, dan.hurley@lanecountyor.gov . County will post a Q&A sheet on the County's website, as well as email all participants on the Interested Parties List with all questions and corresponding answers no later than Monday, June 19, 2023.

Interested Parties List – Lane County will communicate via email with responders who register on the Interested Parties List. Please submit the following to be added to this contact list:

Name of Company:
Company Contact for RFQ Purposes:
Phone:
Email:

Submit via email to: Dan Hurley, dan.hurley@lanecountyor.gov

Response Due Date

Please email the electronic PDF response by June 23, 2023 at 5pm PST to: dan.hurley@lanecountyor.gov

Response Formatting Instructions

Submit one compiled PDF, not exceeding 10 pages, with the following components:

A. Firm Information

Company Name:
Address of U.S. Headquarters:

Address of Service Office:
Service Office Phone Number:
RFQ Contact Name/Title:
RFQ Contact Email:
RFQ Contact Phone:

B. Firm Qualifications with example projects

C. Team Members with individual qualifications

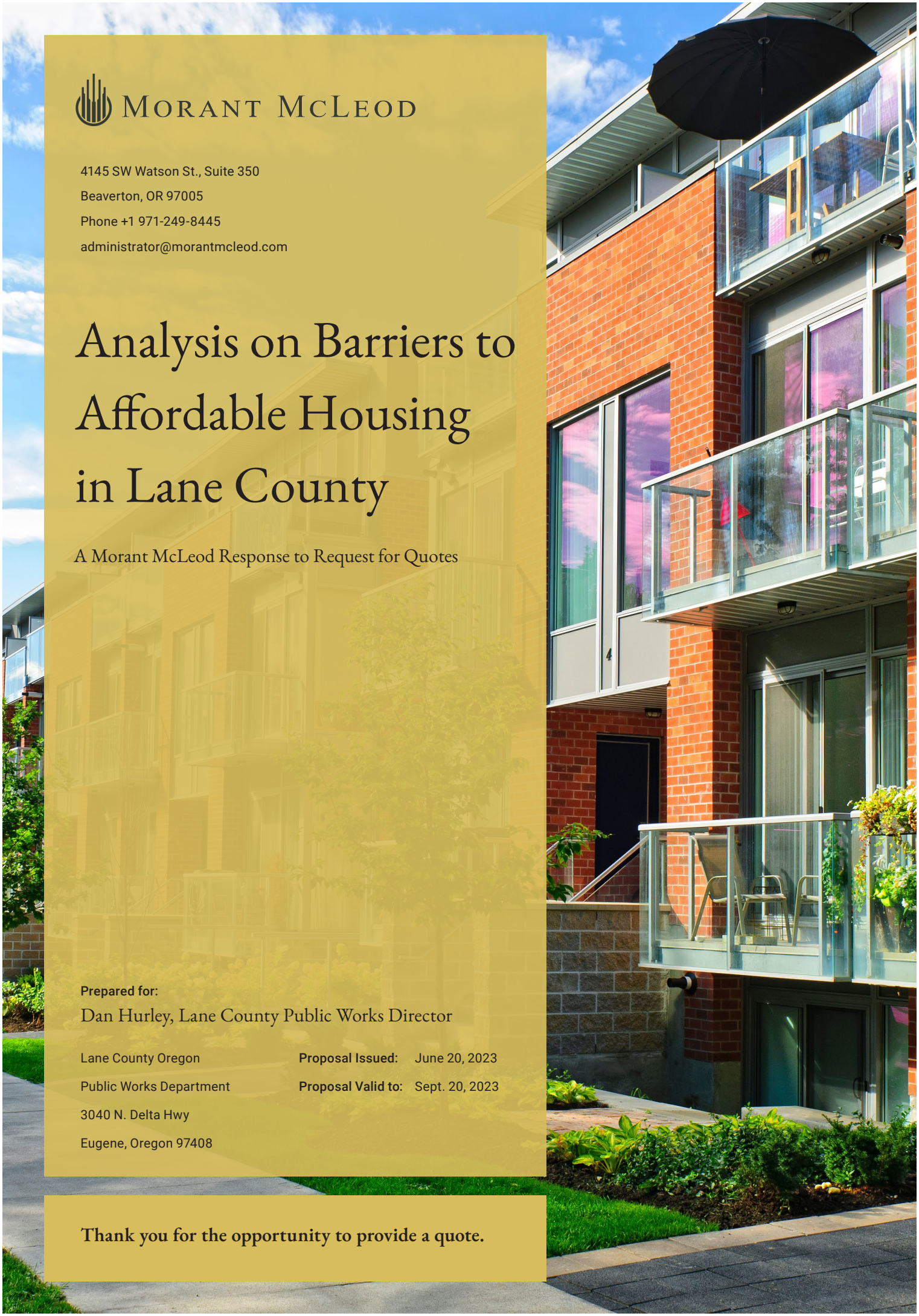
D. Cost Proposal showing estimated hours and cost for each item listed in the Scope of Work

E. A statement of availability and an estimated time schedule.

F. References – 3 minimum

Selection

Lane County anticipates selecting a vendor for this work within three weeks of receiving responses. Due to the urgency of this work, estimated completion time will be considered when selecting a vendor. Lane County reserves the right to select a vendor with consideration of price, qualifications, and availability to do the work. Lane County reserves the right to select a qualified vendor that best serves the interest of Lane County and its citizens.



MORANT MCLEOD

4145 SW Watson St., Suite 350
Beaverton, OR 97005
Phone +1 971-249-8445
administrator@morantmcleod.com

Analysis on Barriers to Affordable Housing in Lane County

A Morant McLeod Response to Request for Quotes

Prepared for:

Dan Hurley, Lane County Public Works Director

Lane County Oregon
Public Works Department
3040 N. Delta Hwy
Eugene, Oregon 97408

Proposal Issued: June 20, 2023
Proposal Valid to: Sept. 20, 2023

Thank you for the opportunity to provide a quote.

About Morant McLeod

Morant McLeod (MM) is a premier international policy consulting firm, specializing in shaping and influencing government policies worldwide. Established in 2020, our team comprises of 69 renowned public policy experts, researchers, technical analysts, consultants, and former government officials hailing from various parts of the globe.

We strive to create a more connected and transparent world, acting as a bridge between governments, businesses, non-profit organizations, and citizens.

Our mission is to help governments and multinational organizations make informed, insightful decisions that promote global development, social progress, and economic prosperity.

Our services span the gamut of policy consultation - from crafting domestic legislation and regulations to designing comprehensive international strategies. We assist in matters of housing and economic policy, climate and environmental issues, international relations, technology regulations, and health policies, among others. By employing a multidisciplinary approach, we help our clients navigate through the complexities of governance, ensuring their strategies are in line with industry norms, upcoming standards, and best practices.

What sets us apart is our commitment to rigorous research, impartial advice, and tailored solutions. Every project we undertake begins with a deep-dive analysis into the specific socio-political landscape, ensuring that the advice we provide is not just theoretically sound but also practically implementable.

Over the years, we have established ourselves as trusted advisors to a diverse array of clients, including local and regional governments, multinational corporations, international institutions, and non-profit organizations. MM's policy recommendations have contributed to significant advancements in governance, corporate responsibility, technological advancements, and prosperity on a global scale.

At MM, we firmly believe in the power of policy to transform societies and build a better future for all. As we continue to grow, we remain dedicated to our mission of facilitating cooperation and understanding, fostering a sustainable and inclusive world.

Eugene, OR downtown. Panoramic view from Skinner Butte Park. Photo by David Gn.

Firm Qualifications

Morant McLeod strives to improve each community in which it works. Our global presence allows us to support communities around the world, while also engaging in the policy changes occurring in Oregon, our home state.

Morant McLeod holds over 500 combined years of analysis and planning experience.

Expertise in Policy Analysis and Strategy Development

We have a proven track record of conducting thorough research and analysis of policy issues, formulating strategies, and providing insightful policy recommendations.

Diverse Team of Professionals

We are a diverse team of experts including public policy experts, researchers, technical analysts, consultants, and former government officials who can provide a wide range of perspectives on policy matters.

Global Network

We hold a robust network of contacts and relationships across the globe, including governments, NGOs, businesses, and academic institutions. This ensures our organization stays up-to-date with policy trends and changes worldwide.

Multidisciplinary Approach

We are able to apply a multidisciplinary approach to policy consultation, integrating political, economic, social, and environmental perspectives.

Ethical Standards

We uphold the highest ethical standards in all of our engagements, demonstrating integrity, impartiality, and confidentiality. We adhere to all applicable laws and regulations in the countries where we operate.

Communication & Facilitation Expertise

We possess exceptional communication skills, both written and verbal, in multiple languages. We are able to communicate complex policy issues and strategies effectively to a wide range of audiences.

Track Record of Success

We hold a track record of successful policy consultations with a variety of clients, including governments, businesses, and non-profit organizations.

Commitment to Continuous Learning and Adaptation

We stay informed about ongoing global trends, changes in government structures and policies, and emerging challenges and opportunities.

Cultural Sensitivity and Adaptability

We hold a deep understanding of different cultures, traditions, and socio-political contexts, enabling us to provide relevant and effective policy advice locally, regionally, and globally.

Positive Impact

Our policy consultation services have led to positive changes, such as improved governance, better public services, economic development, social progress, and environmental sustainability.

Commitment to Equity

Our commitment to equity extends to continually improving local communities, as well as our own methodologies and services, as we practice what we preach.

Certified Minority Owned Firm

As one of the rare minority owned and operated global policy and strategy firms, we aim to create more equitable business environments across the world.

Curated Projects List

A select sample of our housing and regulatory projects that exhibit our analysis, industry, and policy expertise.

Lincoln County, OR

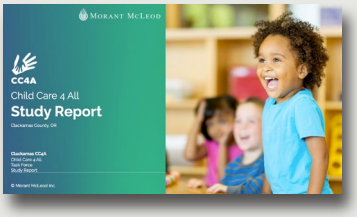
Housing & Homeless Strategy

Providing a full service homelessness strategic planning approach for Lincoln County, including all the cities within Lincoln County, the Community Action Agency for Rural Continuum of Care, and the Siletz Tribe. We conduct analyses of housing barriers, homelessness service barriers, and the economic forces that interact with the two. We work closely with the Lincoln County Housing Authority, the State of Oregon, and other housing organizations to understand the barriers associated with zoning regulations, building codes, and other land use policies. See our project website and sample presentation.

Volvo

FDI & Regulations Strategy

Analyzed changing industry regulations in the United States and European Union to provide international market planning. Developed competitive analyses in each region and market segment to propose foreign direct investment (FDI) allocations. FDI includes development and new construction, service presence, and other capital investments.



Clackamas County, OR

Child Care for All Policy & Strategy

Full service research and strategic planning approach for Clackamas County, Clackamas Workforce Partnership, and Clackamas County Educational Service District to understand the policies that support / produce barriers for service organizations. Included interfaces with Metro, State of Oregon Employment Department, Oregon Health Authority, State of Oregon Early Learning Division, Oregon House Legislative Branch, other entities. See analysis and presentation.

Evergreen CP

Housing Development Strategy

Strategically analyzed regulations related to land use and developed consortiums to overcome development barriers. Analyzed funding opportunities to develop capital packages to provide affordable housing.

Portland Housing Center

Housing Affordability Policy & Strategy

Analyzed community needs and relocation trends against City of Portland, Metro, and State of Oregon regulations to develop strategic policy approaches. Supported proposal of policies to overcome gentrification and forced relocation with new housing developments.

Oregon DHS

Housing Strategy for Foster Care Youth

Analyzed Oregon Department of Human Services needs and proposed strategic housing acquisitions and new construction to meet housing needs. Interfaced with Yamhill County and Oregon Treasury offices to analyze regulations, anticipate budget cuts, develop assessment tools, and propose strategic concepts to maintain service levels.

> "We're doing some very important work together, and I'm glad we chose Morant McLeod to help make this happen."
>
> - County Administrator, Lincoln County, OR

Your Key Team (1/3)

The Lead Research Facilitator and Strategist leads research efforts, assigns analysis to team members, collects data, evaluates approaches, and develops policy recommendations. The role includes communications to key clients, including presenting to government leaders and international executives.

Ernest has analyzed the most complex standards and presented strategic findings to the largest global firms.

Education

Doctor of Business Administration
George Fox University (in progress)

Master of Business Administration
Suffolk University

Business Administration
Warner Pacific University

Certificates

Applied Business Analytics
Massachusetts Institute of Technology (MIT)

Game Theory & Strategy
Yale University

Six Sigma Master Black Belt
Darden University, Management & Strategy Institute

Ernest Stephens II

Lead Research Facilitator & Strategist

An expert in policy and administration, Ernest is an accomplished strategist with over 20 years of executive leadership experience across diverse sectors. His substantial background in strategic planning and business intelligence allows him to create robust, data-driven solutions to complex problems.

With both employment and consultation experience with HUD organizations, Ernest has a rich industry experience in identifying and resolving critical policy, regulatory, and building code issues. His unique understanding of housing, facilitation, research, and process improvement makes him the ideal individual to lead this project.

Selected Resume Highlights

Morant McLeod Leads research, provides high-level facilitation, and creates strategic policy approaches that maximize impact & minimize cost. • *Housing & Homelessness Strategy - Lincoln County* • *Child Care for All - Clackamas County* • *Housing Affordability Strategy - PHC* • *Foreign Direct Investment Strategy - Volvo* • *Housing Strategy for Foster Care Youth - ODHS*	**Partner & Project Lead**
Portland Housing Authority Analyzed housing inventories against needs of diverse communities, proposed policies to the City of Portland to meet housing needs.	**Advisory Board Member** *(Post Project Work)*
City Club of Portland Analyzed housing inventories against needs of diverse communities, proposed policies to the City of Portland to meet housing needs.	**Operations Director**
Darden Incorporated Planned new locations and led construction development efforts for Olive Garden restaurants. Conducted cost analyses, including staffing and resource plans to meet corporate and government policy requirements.	**Business Planner & Six Sigma Master Black Belt**
Fairmont Housing Authority Planned housing services budgets, analyzed services, and supported affordable housing developments.	**Housing Analyst**

Your Key Team (2/3)

The Lead Housing Subject Matter Expert brings extensive knowledge of affordable housing issues, policy development background, regulatory compliance, and insights on both recent and anticipated housing regulations. The role keenly understands industry best practices and innovative approaches.

Dedicated to change and well known as a top affordable housing expert, Chris has provided affordable housing policy recommendations to commissioners, mayors, governors, and other government leaders.

Education

Master of Education
Concordia University

Bachelor of Arts, Urban Studies
Temple University

Chris Aiosa

Lead Housing Subject Matter Expert

Chris is a renowned housing expert, with a robust history of leading initiatives that aim to resolve homelessness. He possesses a unique blend of strategic acumen and compassionate leadership, honed through years of experience in the housing sector from spearheading the development of affordable housing projects.

Chris has unwavering commitment to addressing homelessness, leading to the creation of a platform that serves as a lifeline for those most vulnerable. Today, he leads in-depth regulatory analyses pertaining to housing development and service barriers for the unhoused. His strategic efforts are targeted towards overcoming homelessness, ensuring that everyone has access to secure and affordable housing.

Selected Resume Highlights

Morant McLeod — **Housing Subject Matter Expert**
Leads regulatory analyses related to housing development and unhoused community service barriers in our strategic efforts to overcome homelessness.
- *Housing & Homelessness Strategy - Lincoln County*

Evergreen Community Partners — **Executive Director**
Leads development of affordable housing efforts while focused on increasing resident security, stability, and opportunity through practical resident services and partnerships.
- *Tillamook Apartments - 46 units*
- *Portland (148th) Apartments - 96 units*
- *Molalla Apartments - 60 units*
- *Stayton Apartments - 72 units*
- *Mill City Apartments - 54 units*

Do Good Multnomah — **Founder & Executive Director**
Analyzed housing inventories against needs of diverse communities, proposed policies to the City of Portland to meet housing needs.

Your Key Team (3/3)

The Lead Policy Analyst leads all analysis and modeling efforts by extracting policy provisions into real world impacts, and communicating those with best-in-class tools for easy absorption and understanding.

With a unique mix of policy analysis expertise, land use & GIS acumen, and modeling ability, Dr. Young brings a view of prediction and anticipation that minimize policy risks while increasing effectiveness.

Education

Doctor of Philosophy, Finance & Economics
Utah University

Bachelor of Applied Economics
Utah University

Certificates

Certified Appraiser
Utah Division of Real Estate

Dr. Thomas Young

Lead Policy Analyst

Dr. Thomas Young is a seasoned economist with a demonstrated track record of providing strategic economic insights and analysis that support housing policy. With over 20 years of experience in the field and a doctoral focus on GIS and urban planning, Dr. Young possesses a deep understanding of land use and building code regulations.

Throughout his career, Dr. Young has worked on policy analysis on local, regional, state,and federal levels. His breadth of expertise supports many types of policy, including multinational corporations, startups, government agencies, and NGO regulations. His ability to distill complex economic concepts into practical insights has allowed businesses to navigate uncertain economic environments, mitigate risks, and seize growth opportunities.

Selected Resume Highlights

Morant McLeod — **Chief Economist**
Leads housing development and feasibility analyses, supports strategic planning with data focused approaches.
- *Housing & Homelessness Strategy - Lincoln County*
- *Child Care for All - Clackamas County*

Econometric Studios — **Chief Economist**
Led feasibility studies to determine cost effectiveness of proposed developments, incorporated building codes and land use regulations to support cost analyses.
- *Development Feasibility Study - Loopland Parks Development*
- *Development Feasibility Study - Goldan Hospitality Development*
- *AirBNB & Hotel Growth Models - City of Austin, TX*

Utah State Legislature — **Senior Economist**
Analyzed policies and determined the effects of policy adjustments and proposals. Supported sustainability efforts with strategic suggestions.
- *Housing Fund Analyses - State Tax Commission*
- *Development Feasibility Studies - Prison Relocation Commission*
- *Economic Housing Indicators - State of Utah, United States*
- *Housing & Development Forecast - Fiscal Analyst Office*
- *Housing Costs & Economic Incentives - Fiscal Analyst Office*

Cost Proposal

Your project includes supporting staff who will support the success of this engagement. The assigned staff include:

Dr. La Fawn Brito - Veteran Housing Subject Matter Expert
Devin Stevick - Land Use & Planning Intern
Angeli Sadsad - Lead Project Manager
Chris Yarde - Data & Visualization Analyst
Sridharan Ganatra - Report Designer

$29,320

115 - 125 est. hours

Fastest Approach to Perform Scope

This quote has all of the critical parts of the recommended approach. In order to deliver at an earlier date, some interviews are omitted. (1-2 weeks sooner.)

- Scope 1: estimated 10% of project, $2,932
- Scope 2: 20%, $5,864
- Scope 3: 20%, $5,864
- Scope 4: 25%, $7,330
- Scope 5: 15%, $4,398
- Scope 6: 10%, $2,932

$31,440

130 - 150 est. hours

Recommended Approach to Perform Scope

This recommended approach provides the deliverables before the County Commissioners September break, while ensuring all stakeholders have input.

- Scope 1: estimated 10% of project, $3,144
- Scope 2: 20%, $6,288
- Scope 3: 20%, $6,288
- Scope 4: 25%, $7,860
- Scope 5: 15%, $4,716
- Scope 6: 10%, $3,144

$37,090

150 - 170 est. hours

Recommended Approach with Implementation Plan

This recommended approach includes an implementation structure to guide the department through its subsequent transformation process.

- Scope 1: estimated 9% of project, $3,144
- Scope 2: 17%, $6,288
- Scope 3: 17%, $6,288
- Scope 4: 29%, $10,685
- Scope 5: 20%, $7,541
- Scope 6: 9%, $3,144

Note: Implementation plan costs allocated to scopes 4 and 5

Your MM project includes around-the-clock project management to ensure all aspects of the project flow smoothly.

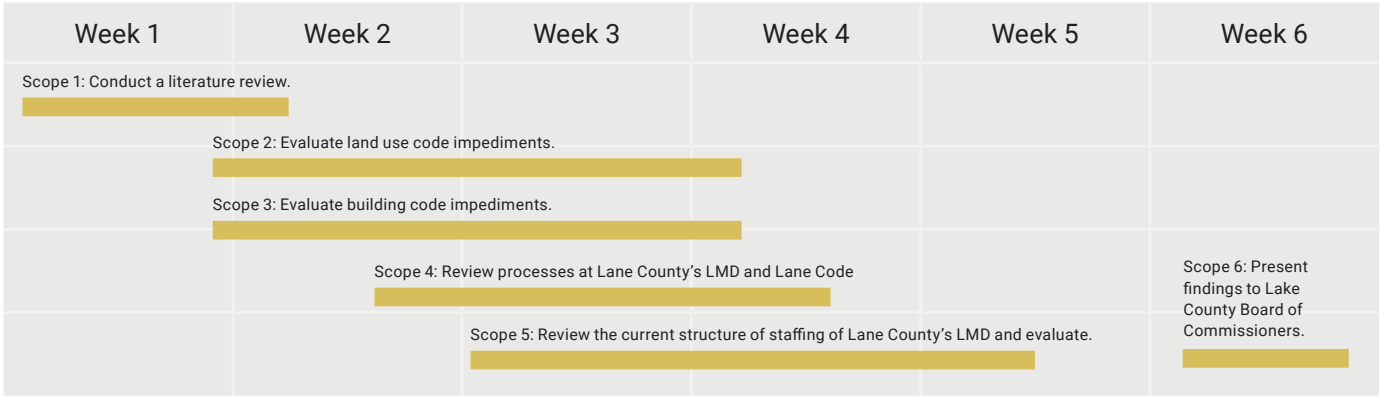
Recommended Timeline

Your MM team prioritizes your needs. The following dates can be negotiated to expedite the work as necessary.

Statement of availability: The Morant McLeod team is ready, available, and excited to complete this project.

Week (-3) to week 0, beginning June 26: Public works vendor selection.

Week 0, beginning July 17: Contract week. During this time, project management will send data requests, schedule interviews, and prepare documentation. Project leaders will perform extended literature reviews, prepare meeting briefs, and begin draft report outlines.



July 24

INTERVIEWS

Dan Hurley, Department Director, Public Works

Keir Miller, Division Manager, LMD

John Webster, Building Official, LMD

Amber Bell, Planning Director, LMD

Jacob Fox, Executive Director, Homes for Good

GAP ANALYSIS 1

Land use codes

Building codes

July 31

DATA ANALYSIS 1

Receive data request 1

Send data request 2

FOCUS INTERVIEWS

LMD Staff

Land Use Planning & Zoning Staff

August 7

DATA ANALYSIS 2

POLICY ANALYSIS

FOCUS INTERVIEWS

Local developers (3 to 5)

Out of area developers (as necessary)

August 14

WORKFLOW MAPPING

VALUE STREAM MAPPING

ALIGNMENT AND GAP ANALYSES

STAFF & RESOURCES NEEDS ANALYSIS

COST ANALYSIS

REPORT DEVELOPMENT

August 21

INITIAL REPORTS

KEY PARTIES REVIEW MEETINGS

UPDATED REPORTS REVIEW BY KEY PARTIES

August 28

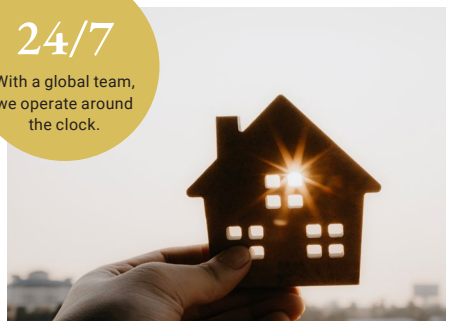
BOARD OF COUNTY COMMISSIONERS PRESENTATION (TUESDAY, AUG 29)

What happens after the presentation?

There are contingencies built into the quote that will allow our teams to come back for a second Board meeting, if needed. There is also time built in for the final report development for both internal (County report) and external (public report) parties.

24/7

With a global team, we operate around the clock.



References

Tim Johnson, County Administrator Lincoln County	541-265-0209 tjohnson@co.lincoln.or.us
Dr. Adam Freer, Division Director Clackamas County	971-533-4929 AFreer@clackamas.us
Karen Rockwell, Executive Director Housing Authority of Lincoln County	971-304-9418 krockwell@halc.info
Rod Cross, Mayor City of Toledo	541-336-2247 rod.cross@cityoftoledo.org

June 2023

ANALYSIS ON BARRIERS TO AFFORDABLE HOUSING IN LANE COUNTY RFQ PROPOSAL

A. Firm Information

Submitted By:
Office of: Office
3360 N San Fernando Rd #1035
Los Angeles, CA 90065
213.282.8123

Elizabeth Timme
Director of Design & Development
elizabeth@officeofoffice.com

B. Relevant Projects

The Office Of: Office team partners with local government agencies to implement alternative forms of housing affordability, helping to shape future policy and programs. By analyzing current codes, permit processes, and local government capacity, we build upon relevant housing research to assist numerous cities in revising regulations and procedures to increase low-rise developments. We work nationally to identify actionable pathways to alleviate barriers to affordable housing. With our demonstrated expertise, we can help Lane County meet its housing needs, including those already identified by thought leaders in the Oregon housing landscape. Our relevant projects have included solutions similar to those highlighted in the Affordable Housing Action Plan and Alternative Housing Options report.

CITY OF BOSTON: NONCONFORMITY ANALYSIS FOR ADDITIONAL DWELLING UNITS

Client: Boston Planning and Development Agency (BPDA)
Year Completed: 2023 - Current

Office Of: Office has partnered with the Boston Planning and Development Agency to identify potential regulatory changes and policy solutions to zoning for Additional Dwelling Units (ADUs) that can reduce barriers to the permitting process. Our goal is to identify patterns and barriers in existing zoning regulations and physical lot constraints that require ZBA approval to provide recommended changes to zoning that will make ADU development as-of-right. This initiative is the first of many for the BPDA to encourage resident-led development for communities of color and a first step towards a comprehensive, equity-focused, city-wide zoning reform. To ensure the City will adopt our recommendations, we are establishing relationships between development and impacts based on statistics. We are also measuring and comparing the proliferation of ADUs in Boston widely, and Mattapan specifically, to provide context for this specific housing typology to help address housing equity in the broader context of the City.

CITY OF SOUTH GATE: ADU PROGRAM

Client: City of South Gate
Year Completed: 2022 - current

Office Of: Office is working with the City of South Gate to identify the levers of housing production specific to Accessory Dwelling Units (ADUs) to propose a comprehensive ADU Education and Permit Assistance Program. The goal of the programs is to help facilitate the construction of new units and increase City's housing supply. Our team processed demographic and spatial data to conduct geographic analysis to verify contextual opportunities for ADU development. We designed prototype units responsive to lot size, density, and population income to illustrate and socialize this housing typology to residents. To ensure pathways for implementation, we identified funding gaps and existing financial incentives. Additionally, we are assessing the current codes, permitting process, and staff structure to understand the current barriers and opportunities to reform policy and a streamlined operational processes.

CITY OF LOS ANGELES: ADU CONSTRUCTION PILOT

Client: Los Angeles Mayor's Office, Bloomberg Innovation Team (Los Angeles i-team)
Year Completed: 2017 - 2019

In partnership with the Bloomberg Innovation Team, the Mayor's Office of Los Angeles, and Council District 1, we launched an ADU Pilot Project in tandem with the newly passed 2017 ADU Policy to demonstrate that average homeowners can build a thoughtfully-designed home in their backyard under this exploratory law change. We lead the design and construction of a two-story, two-bedroom, 1,000 sq ft ADU completed in the historic Highland Park neighborhood in Northeast LA. The project demonstrated that ADUs could be affordably built, contextual in their design, and shape future ADU policy. Team member Elizabeth Timme facilitated the design, permitting, financing, and construction of the ADU. The goal was to identify any barriers to construction or permitting for the Mayor's office to suggest policy changes that would eliminate roadblocks to ADU development. Our team found that the Historic Preservation Overlay Zone had an expensive and unclear resident-led review process. Our team successfully lobbied for amendments to the planning and permitting process, which the LA City Planning Department adopted. This work informed an updated plan check and inspection process.

FUTURO DE FROGTOWN

Client: Clockshop & Meltzer Foundation
Year Completed: 2015-2016

Futuro de Frogtown is a policy analysis and recommendation report developed to understand what zoning changes could be implemented to mediate displacement caused by gentrification in communities along the Los Angeles River. As the facilitators of this project, we convened local informal business owners, tenants, and homeowners for active discussions that established the basis for policy and programmatic recommendations. Our goal was to inform an amendment to an overlay zone for the area called the "Q-Conditions" or the Qualified Conditions. This zoning law feature allows for an additional layer of property-specific design and land use rules. We successfully lobbied for the Floor Area Ratio and height restrictions on a property to be lifted to include affordable housing units in future housing development projects. During the more extensive Los Angeles rezoning process, this strategy was adopted and incentivized developers to build affordable units in a gentrifying neighborhood.

C. Team Members

Office Of: Office (OOO) leadership has focused on alternative models for housing development in the Los Angeles area and nationally in cities like Boston. Our staff is intimately familiar with the protocols, working methodologies, and expectations of public agencies from our years of public sector partnerships, including the Bloomberg Innovation Team, the Housing Authority of the City of LA, the DOT Great Streets Initiative, and many more. Convening community-based organizations, non-profits, and local government partners, OOO develops policies, projects, and programs that foster cross-sector collaboration to address complex issues affecting communities of color in the built environment. Our work invests in existing community resilience models and proposes methods for resident-led neighborhood-scale development.

Advisory Council

In addition to Office of: Office staff, our team features an Advisory Council of local housing thought leaders to inform the strategic direction of the work and provide critical insight into the context of Lane County's affordable housing landscape.

Kol Peterson | *Advisor*

Kol Peterson is an ADU expert based in Portland, Oregon, who has helped catalyze the exponential growth of ADUs in Portland over the last decade through ADU advocacy, education, consulting, policy work, and entrepreneurship through his company, Accessory Dwelling Strategies LLC. He is the author of Backdoor Revolution-The Definitive Guide to ADU Development. He consults with homeowners about ADUs on their property and teaches ADU classes for homeowners and real estate agents in Oregon, Washington, and California. He served on the technical and rules advisory committees for Oregon's House Bill 2001 to overhaul municipal residential zoning standards to allow for middle housing throughout Oregon. He has a master's in environmental planning from Harvard's Graduate School of Design. Before his ADU work, Kol worked in the federal government for ten years in Washington, DC, and Portland, Oregon.

Rebecca Lewis, Ph.D. | *Advisor*

Rebecca Lewis (Ph.D.) is an Associate Professor in Planning, Public Policy and Management at the University of Oregon and the Co-Director of the Institute of Policy Research and Engagement. She is an affiliate of the National Center for Smart Growth. She studies land use policy, transportation finance, and the nexus of land use, transportation, housing and climate change. Her work has been funded by the National Institute for Transportation and Communities, National Science Foundation, and the Department of Land Conservation and Development. She recently co-edited the *Handbook on Smart Growth Promise, Principles, and Prospects for Planning.*

Kaarin Knudson, AIA | *Advisor*

Kaarin Knudson, AIA, is an architect, urban designer, educator, and organization leader with more than 20 years' experience working to advance sustainable design, equity, and community-led solutions. She is the principal of Larco Knudson Sustainable Urban Design and founding director of Better Housing Together, a multi-sector housing advocacy organization created in 2017. Most recently, Kaarin has advocated for and advised on the implementation of Oregon's landmark "middle housing" laws to eliminate exclusionary zoning and re-legalize traditional housing types. She authored Lane County's first Affordable Housing Action Plan in 2020 and helped to negotiate the creation of Eugene's first Affordable Housing Trust Fund in 2018.

Office of: Office

Lilia Alejandra Guerrero | *Policy Director*

Alejandra, co-founder of Office of Office, was born and raised in northern Mexico. She previously worked as the national assistant manager of urban regeneration at Mexico's leading housing authority, INFONAVIT, as a community engagement and design fellow in LA-Más, and as a lecturer of sociology, urban planning, and architecture at the University of Monterrey and Carolina University. She holds a bachelor's degree in Architecture from the University of Monterrey, a master's in Urban and Regional Planning from UCLA, a master's in Architecture of Urban Design from University College London. She is currently pursuing a Ph.D. in Sustainable Urban Development from the University of Oxford.

Education

Candidate	**University of Oxford**, Oxford, England Doctor of Philosophy in Urban Sustainable Development, DPhil USD
2019	**UCL**, London, UK M.Arch
2018	**UCLA**, Los Angeles, CA Master in Regional and Urban Planning
2013	**UDEM**, Monterrey, MX B.Arch

Accreditations & Leadership

2017	**IAAC Summer School**, Programming and digital fabrication
2018	**Urban Humanities Initiative Graduate Certificate**, UCLA

Professional Experience

2021 - current	**Office of: Office**, Los Angeles, CA *Co-Founder, Director of Planning & Policy*
2019 - 2021	**Ciudad Kiosko**, Monterrey, MX *Co-Founder, Civic Innovation & Public Space Lead*
2017 - 2018	**LA-Más**, Los Angeles, CA *Community Engagement & Design Fellow*
2013 - 2016	**INFONAVIT**, Mexico City, MX *National Assistant Manager of Urban Regeneration*

Office of: Office

Elizabeth Timme | *Design Director*

Elizabeth, co-founder of Office of Office, is a third generation architect born in Texas and raised in Los Angeles. She has been named an Emerging Voice by the Architecture League, Women of the Year by Los Angeles Magazine, Curbed's Young Gun of the Year, Next City Vanguard 2019 (recipient of the Vanguard Big Idea Challenge,) and Exhibit Columbus Washington Street Civic Leader. She is an adjunct teacher at Cal Poly Pomona and has taught at Woodbury and Harvard Universities. When not on juries or teaching Elizabeth writes in journals and publications like Manifest Journal, Log 48, and Tablula Plena. Previously, Elizabeth co-founded and co-directed LA-Más, a community development non-profit, where she led numerous projects and initiatives.

Education

2010	Harvard University, *Cambridge, MA* Master of Architecture
2005	University of Southern California, Los Angeles, CA B.Arch

Accreditations & Leadership

2023	Global Policy Leadership Academy - Vienna
2022 - Present	MICD Just City Fellow & Advisor
2021	USC Ross Minority Program in Real Estate
2019	Next City's Vanguard Fellow
2013 - Present	Re:Code LA / Zoning Advisory *Committee Member*

Professional Experience

2012 - current	**Office of: Office**, Los Angeles, CA *Co-Founder, Director of Design & Development*
2012 - 2022	**LA-Más**, Los Angeles, CA *Founder, Co-Executive Director*
2009 - 2012	**MASS Design Group**, Cambridge, MA *Head of US Operations*

Office of: Office

Chazandra Kern | *Project Manager*

Chaz Kern is a second-generation Filipino-American designer and co-founder of Office: of Office. For four years, Chaz has served as program manager for the Backyard Homes project, an affordable housing alternative, leading our housing programs and working with numerous cities to develop ADU housing programs. She also manages the South Gate ADU Program, helping to identify the levers of housing production specific to ADUs that affect housing production. She received a Master of Architecture from the University of Oregon with a specialization in housing and a Bachelor in Architectural Studies from Arizona State University.

Education

2017	**University of Oregon**, Eugene, OR Housing Specialization, M.Architecture, 2017
2015	**Arizona State University**, Tempe, AZ B. Architecture

Accreditations & Leadership

2022	SCAG Los Angeles County Housing Policy Leadership Academy
2021	HUD Fair Housing Training Certification
	USC Ross Minority Program in Real Estate

Professional Experience

2021 - current	**Office of: Office**, Los Angeles, CA *Co-Founder, Director of Planning & Policy*
2018 - 2022	**LA-Más**, Los Angeles, CA *Design Lead & Project Manager*
2014	**Lathrop Construction**, Benicia, CA *Project Engineer*

Office of: Office

Olivia Arena | *Researcher*

Originally from Houston, Texas, Olivia Arena experienced the vibrancy of a sprawling, diverse, humid city. At the University of Texas at Austin, she grew interested in comparative urban research, specifically place-based interventions to address urban injustices. In the Metropolitan Housing and Communities Policy Center at the Urban Institute, she worked on social and economic research in communities across the country including a project with Home Forward in Portland, Oregon. In the midst of the COVID-19 pandemic, she pivoted to affordable housing advocacy at the national level, mobilizing advocates in states, including Oregon, to demand emergency tenant protections and rental assistance. Olivia recently received her Master of Urban and Regional Planning with a concentration in Design & Development from the University of California, Los Angeles. There, she conducted research on approaches to increasing affordable housing production in California and housing stability policies along the Los Angeles River.

Education

2023	**UCLA**, Los Angeles, CA Master of Regional and Urban Planning
2016	**UT,** Austin, TX Bachelor of Arts: International Relations & Global Studies, Urban Studies

Accreditations & Leadership

2022	**Urban Humanities Initiative Graduate Certificate**, UCLA

Professional Experience

2023 - current	**Office of: Office**, Los Angeles, CA *Planning & Policy Fellow*
2023 - current	**UCLA Institute of the Environment and Sustainability**, Los Angeles, CA *Graduate Student Researcher*
2022 - 2023	**Los Angeles Department of Transportation (LADOT)**, Los Angeles, CA *Student Professional Worker, Project Coordination & Evaluation*
2021 - 2022	**UCLA Department of Urban Planning**, Los Angeles, CA *Graduate Student Researcher*
2020 - 2021	**National Low Income Housing Coalition (NLIHC)**, Washington, DC *Housing Advocacy Organizer*
2016 - 2020	**Urban Institute**, Washington, DC *Research Assistant/Analyst*

D. Cost Proposal

Scope of Work	Subtotal Cost	Time	Total Hours
Task 1: Conduct a Literature Review			
Identify & evaluate barriers to Affordable Housing in Lane County and synthesize findings and draft a (10) page Literature Review Report	***$6,430***	*5 weeks*	*106*
Task 2: Evaluate Land Use Impediments in Lane County			
Analyze Land Use designations and Zoning Ordinances materials and interview experts to identify barriers preventing efficient land use within Oregon's Statewide Planning Goals	***$5,395***	*5 weeks*	*78*
Task 3: Evaluate Building Code Impediments			
Analyze Lane County Building Code Regulations and interview Oregon/Lane County Architects to identify Building Code barriers to Affordable Housing (specifically ADUs & Tiny Homes)	***$3,770***	*4 weeks*	*58*
Task 4: Lane County's Land Management Division and Lane Code Review			
Analyze current materials on Planning and Building processes and interview Lane County Staff Host Lane County Staff workshop to discuss land use, building code, and process findings and inform draft recommendations	***$6,430***	*4 weeks*	*96*
Task 5: Lane County's Land Management Division Structure and Staffing Review			
Evaluate current and anticipated capacity needed to fund/staff proposed process in Task 4 Review new & anticipated legislation that might impact development application process and interview Lane County Staff to review structure/staffing capacity Host Lane County Staff workshop to discuss legislation findings & staffing evaluation and inform draft recommendations	***$11,285***	*7 weeks*	*164*
Task 6: Project Findings to Lane County Board of Commissioners			
Finalize recommendations per Staff and Advisor feedback from interviews & workshops into a Presentation & Report on all project findings Present findings to Lane County Board of Commissioners	***$4,925***	*3 weeks*	*72*
Advisory Board			
Monthly Housing Advisor Meetings & Workshops	***$5,940***	*ongoing*	*40*
	Total Proposal Cost	**$45,165**	

E. Statement of Availability and Estimated Time Schedule

Scope of Work	*Time*	*Month 1*	*Month 2*	*Month 3*	*Month 4*	*Month 5*
Task 1: Conduct a Literature Review						
Identify & evaluate barriers to Affordable Housing in Lane County and synthesize findings and draft a (10) page Literature Review Report	*5 weeks*					
Task 2: Evaluate Land Use Impediments in Lane County						
Analyze Land Use designations and Zoning Ordinances materials and interview experts to identify barriers preventing efficient land use within Oregon's Statewide Planning Goals	*5 weeks*					
Task 3: Evaluate Building Code Impediments						
Analyze Lane County Building Code Regulations and interview Oregon/Lane County Architects to identify Building Code barriers to Affordable Housing (specifically ADUs & Tiny Homes)	*4 weeks*					
Task 4: Lane County's Land Management Division and Lane Code Review						
Analyze current materials on Planning and Building processes and interview Lane County Staff Host Lane County Staff workshop to discuss land use, building code, and process findings and inform draft recommendations	*4 weeks*					
Task 5: Lane County's Land Management Division Structure and Staffing Review						
Evaluate current and anticipated capacity needed to fund/staff proposed process in Task 4 Review new & anticipated legislation that might impact development application process and interview Lane County Staff to review structure/staffing capacity Host Lane County Staff workshop to discuss legislation findings & staffing evaluation and inform draft recommendations	*7 weeks*					
Task 6: Project Findings to Lane County Board of Commissioners						
Finalize recommendations per Staff and Advisor feedback from interviews & workshops into a Presentation & Report on all project findings Present findings to Lane County Board of Commissioners	*3 weeks*					
Advisory Board						
Monthly Housing Advisor Meetings & Workshops	*ongoing*					
Overall Timeline	***5 Months***					

Staff Availability Statement

Office of: Office hereby acknowledges and confirms that qualified staff will be available for the duration of this contract, regardless of when the work is assigned and due, as outlined in the Cost Proposal of this RFQ.

F. References

Amanda Daflos
Executive Director, Bloomberg Center for Public Innovation at Johns Hopkins University
Former Chief Innovation Officer and Director of the Bloomberg Los Angeles Innovation Team
303-819-7232 amandadaflos@yahoo.com

Maria Cabildo
California Community Foundation Director, Housing & Economic Opportunity
213-413-4130 mcabildo@gmail.com

Jason Neville
Office of the Mayor, Innovation Team
(323) 842-4573 / jasonsneville@gmail.com
LA Accessory Dwelling Unit Pilot Program

Helmi Hisserich
Los Angeles Housing Department
(213) 400-2866 / helmi@lesardevelopment.com
Neighborhood Stabilization Program

Christopher Hawthorne
Chief Design Officer, City of Los Angeles
(213) 978-8024 / christopher.hawthorne@lacity.org
LADBS ADU Standard Plan Program

ANALYSIS TO BARRIERS ON AFFORDABLE HOUSING

RESPONSE TO QUOTES

Kent Howe and Jim Mann

July 24, 2023

1.0 INTRODUCTION

Lane County has determined that the county has a "severe shortage that has increased the cost of housing throughout the county". That determination includes a subsequent determination that a larger inventory of housing may result in providing housing at pricing affordable to people at low to medium income levels. In tandem with the overriding determination, while acknowledging that the Land Management Division (hereafter referred to as "LMD") significantly affects the land use system, Lane County has requested the performance of a comprehensive review of land use permitting systems and processes that are within the jurisdiction and control of Lane County. It has requested that qualified vendors perform that review to produce information to determine if Lane County is doing everything within the current land use system to assist clients in obtaining legal residential development. The request also includes recommendations for improvement of service delivery by LMD.

The following proposal provides for qualified vendors performing a comprehensive review of Lane Code provisions regarding building and development, an identification of barriers to affordable housing existing in Lane Code provisions, a comprehensive review of LMD processes regarding building and development, and a review of current LMD funding and staffing levels (including management practices regarding funding and staffing).

While the focus is on evaluating those elements that are within Lane County's jurisdiction and control, it also includes a section with recommendations regarding Oregon Planning Goals, statutes and administrative rules that the County has no jurisdiction or control over but of which the County can advocate to the State of Oregon for modification or change, including provisions relating to the construction of Accessory Dwelling Units ("ADU's") and "Tiny Homes."

2.0 VENDORS

Kent Howe and Jim Mann are the vendors of this proposal. Their experience and qualifications are as follows:

Kent Howe

Prior to becoming a land use consultant, Kent Howe had a 37-year career at the Lane County Land Management Division (hereafter referred to as "LMD") with emphasis on rural resource management. His work, in the early part of his career, which began in 1979, focused on development and of the Lane County Rural Comprehensive Plan and the Eugene Springfield Metropolitan Area General Plan, and working with state agencies to get these plans acknowledged in compliance with State law.

Kent Howe became Planning Director of the LMD in 1995 and served in that position for 17 years. As a working supervisor, he managed a staff of up to 16 professionals. His work spanned a wide spectrum of projects and responsibilities involving long-range planning projects of local and statewide significance. It included coordinating with small cities, other counties and the Oregon Department of Land Conservation and Development (hereafter referred to as "LCDC").

Kent Howe managed special projects involving natural resources including riparian habitat protection, the McKenzie Watershed Council and the Coastal Lakes Study. In addition, he worked with policymakers to develop ordinances for farm and forest lands, riparian protection and watershed protection, all of which required presentations to planning commissions, elected officials, LCDC, hearings officials, university classes, conferences and citizen groups. On behalf of Lane County, he lobbied the state legislature regarding land use matters and participated in legislation. His work included the processing of land use applications and appeals, and research and writing policy and code interpretations. His duties included mediated dispute resolutions. He developed annual work programs, prepared budgets, supervised staff, conducted evaluations, coordinating staff assignments, training and administration. During his career, he participated in two audits of the LMD as Lane County sought continuous public service improvements.

Born in Oklahoma, Kent has resided in Oregon since 1974. He received a Bachelor of Science degree in Forest Management from Oklahoma State University in 1974 and received a Master of Arts Degree in Environmental Studies from the University of Oregon in 1978. He was active in the Association of Oregon Planning Directors from 1983 to 2012, and served as president from 1999 to 1997. During his career, he was a member of the Oregon Chapter of the American Planning Association. In 2018, Kent

was appointed to the Oregon Energy Facility Siting Council by Governor Kate Brown and is currently Vice Chair serving his second term, which ends in 2026.

Jim Mann

Jim Mann was born in Baker, Oregon and has been a lifelong resident of Oregon. His great grandparents had homesteads in Baker and Walla Walla counties. Jim's academic background emphasized oral and written communication. In 1972, Jim received a Bachelor of Arts degree in English Literature form Portland State University. He received a Fulbright grant and, from 1971 to 1972, attended the Zagreb Institute in Zagreb, Yugoslavia where he learned to speak and write Croatian and Serbian, and where he studied Eastern European history. Jim was a member of Eugene Cascade Toastmasters for 15 years when he won numerous serious and humorous speaking contests. Jim has taken college-level classes in real estate law, surveying law, and land use law. Jim taught a class, Land Use Planning for Professionals, at Lane Community College and organized and made presentations about rural land use planning to the Lane County Association of Realtors and to various Lane County realtor groups.

From 1972 to 1979, Jim Mann worked as a land use planner in Douglas County, Oregon where he supervised the current land use planning staff and revised the Douglas County Subdivision Ordinance to comply with ORS 92. During this time, Jim became very familiar with the development and adoption of the Statewide Planning Goals.

From 1979 to 2002, Jim Mann worked as a land use planner for Lane County. In 1979, there were numerous different and conflicting land use application review processes in Lane Code Chapter 10. Jim initiated and then worked on a project to revise and to consolidate these processes into the new Lane Code Chapter 14. In 1984, Jim was assigned supervisory responsibilities of the long-range planning staff in order to help Lane County achieve acknowledgement of the Lane County Rural Comprehensive Plan (hereafter referred to as the "RCP") and implementing ordinances with State law. Jim was the primary drafter of the new Lane Code Chapter 16. From 1984 to 1994, Jim was the primary planner assigned to update LC 13 and 16 to comply with State law. In 1995 Jim was assigned the responsibility to develop and help Lane County adopt its Periodic Review Report and work program to update the RCP. Jim also helped develop code and policy amendments to consolidate the two planning commissions and to perform long range planning on a watershed basis. From 2000 to 2002, Jim

developed a work program for the adoption of the McKenzie Watershed portion of the RCP and was the lead planner to complete the work and get it adopted by Lane County. Jim was also the lead planner to help revise LC 16 to comply with changes in Statewide Goal 14 and to revise the resource zones in LC 16.210 to 212 to comply with State law. All of Jim's lengthy legislative work with Lane County involved attending and making presentations at many public meetings and hearings with citizens, planning commissions and the Lane County Board of Commissioners. As a follow-up to this work, Jim helped to train planning staff and to develop code implementation procedures.

From 2002 until 2022, Jim Mann worked as a private land use consultant, doing land use application work for clients in many Oregon counties. Jim just recently retired. During his long career working on Lane County land use matters, from 1979 to 2023, Jim developed an extensive personal file of Lane County land use ordinances for use in determining the legislative history of Lane County land use regulations and State regulations for use in preparing Lane County land use applications.

3.0 REVIEW SUBJECTS

The following are the subjects of vendor review:

- Relevant studies for evaluating barriers to affordable housing
- Lane County Code (Land Use/Development Provisions)
- Building Code Provisions
- LMD processes and Lane Code provisions regarding development and building
- LMD funding and staff levels
- Statewide Planning Goals, State Law, and Oregon Administrative Rules

4.0 IMPLEMENTATION OF REVIEW

Of the aforementioned review subjects, most are within the jurisdiction and control of Lane County. Accordingly, an emphasis of the review will be on the County code and the manner in which it is utilized by LMD staff to serve client applications. Nonetheless, the subject of state-wide regulatory impacts on affordable housing will be included in the report to the Board of Commissioners.

- **Literature Review**

A literature review of background reference studies, relevant Lane Code provisions, case law, recent legislation dealing with affordable housing and accessory dwelling units and land use Statues and Rules synthesized into a report for delivery to the Board of County Commissioners.

- **Lane County Code (Land Use/Development Provisions)**

The vendors will conduct an interview schedule of interested parties to gather information regarding the code, particular provisions of the code and interpretation of particular provisions. LMD staff will also be interviewed for that purpose. That information will be used in conjunction with the vendors' individual review of the code to determine what barriers to affordable housing within the code and by application of its provisions to individual client requests.

Interested parties consist of the county's clients within the land use system. Clients are defined as individual property owners, representatives of property owners (i.e., land use consultants and lawyers), advocacy groups (i.e., Land Watch of Lane County, Homebuilders Association, etc.) and other necessary interested/impacted property owners and businesses.

- **Building Code provisions**

While building code provisions are primarily a matter of state jurisdiction, local interpretations and service delivery of permits remain as functions of Lane County and shall be reviewed by the vendors in the same fashion as Lane Code and its utilization by LMD in the processing of permit applications.

- **LMD processes and Lane Code provisions regarding building development**

The vendors will conduct an interview schedule of interested parties to gather information about how timely and effectively LMD serves its clients. In addition to LMD clients (as defined hereinabove) and LMD staff, interested persons such as Lane County Legal Counsel and LCOG Hearings Officials will be interviewed. The LMD Property Records Online (LMDPRO) that records information regarding the processing of client applications (use permits, zoning, timelines, approvals, denials, appeals, etc.) shall be examined by the vendors. The interviews and records examinations will be used to determine what barriers to affordable housing exist within Lane County's processing of client applications.

- **LMD funding and staffing levels**

The Vendors will interview LMD staff to gather information regarding the sufficiency and effectiveness of the county's funding of LMD and the experience and knowledge of LMD staff. In conjunction with a review of the Lane County General Fund associated with LMD and interviews of Lane County Legal Counsel, the LMD staff interviews will produce information that will be used to determine what barriers to affordable housing existing in relation to LMD funding and staffing levels.

- **Statewide Planning Goals, Oregon Revised Statutes and Administrative Rules**

The vendors will interview knowledgeable experts regarding state statutes, building codes and administrative rules. Such experts will be drawn from knowledgeable entities and individuals such as 1000 Friends of Oregon, the Oregon Property Owners Association and state legislators with expertise in the Oregon land use system.

5.0 REPORT TO BOARD OF COUNTY COMMISSIONERS

This report will be an analysis of the entire customer service for land use within Lane County, from application intake to review of appeals and final decisions. It will include an analysis of LMD property records, client and staff interviews and a review of Lane Code and State of Oregon provisions to determine barriers to affordable housing that exist within the permit processing system. It will conclude with specific clear recommendations to Board of County Commissioners regarding the elimination of such barriers. In addition to these recommendations, the report will include suggested code language to implement these recommendations where appropriate.

6.0 TIMING AND CONTRACT PRICE

The vendors will deliver the aforementioned report to the Board of Commissioners on a date no later than three months from the date of Lane County approval and acceptance of this response to Request for Quotes. The

contract price for the proposed evaluation and report shall be $60,000, payable 50% payable on the date of an executed agreement between Lane County and the vendors regarding this Response to Request for Quotes, and 50% payable on the date vendors furnish the proposed report to Lane County. Some of the following work tasks may be performed concurrently.

- Literature Review of Land Use Code, case law, Statutes, Rules and recent legislation relevant to affordable housing and accessory dwelling units including a summary report

  3 weeks

- Building Code provisions

  1 week

- LMD processes and Lane Code provisions regarding building development with recommended process and Lane Code changes in legislative format

  6 weeks

- LMD funding and staffing levels

  2 weeks

- Report and Presentation to Lane County Board of County Commissioners

1 week

7.0 VENDOR INFORMATION

Vendor(s) Contacts:

Kent Howe

Email: kenthoweplanning@gmail.com

Phone: (541) 520-0844

Jim Mann

Email: jamannllc@comcast.net

Phone: (541) 514-3051

Vendor(s) Qualifications: See Section 2.0 Vendors (Response to RFQ)

Cost Proposal: See Section 6.0 Contract Price (Response to RFQ)

References:

Mike Evans (541) 726-8523

Gerry Gaydos (541) 302-5281

Mia Nelson (541) 520-3763

Nick Lelack (541) 639-5585

Don Kahle (541) 424-2424

Lane County Oregon Public Works Department RFQ
Analysis on Barriers to Affordable Housing in Lane County

July 24th, 2023

Pallet PBC Information

Address: 1930 Merrill Creek Pkwy, Everett, WA 98203
Phone: (425) 322-5122
Email: info@palletshelter.com
Web: https://palletshelter.com

For questions about this submission, please contact:

Lia Azul Salaverry, Senior Manager Advisory Services
Email: lia@palletshelter.com
Phone: 510-899-1299

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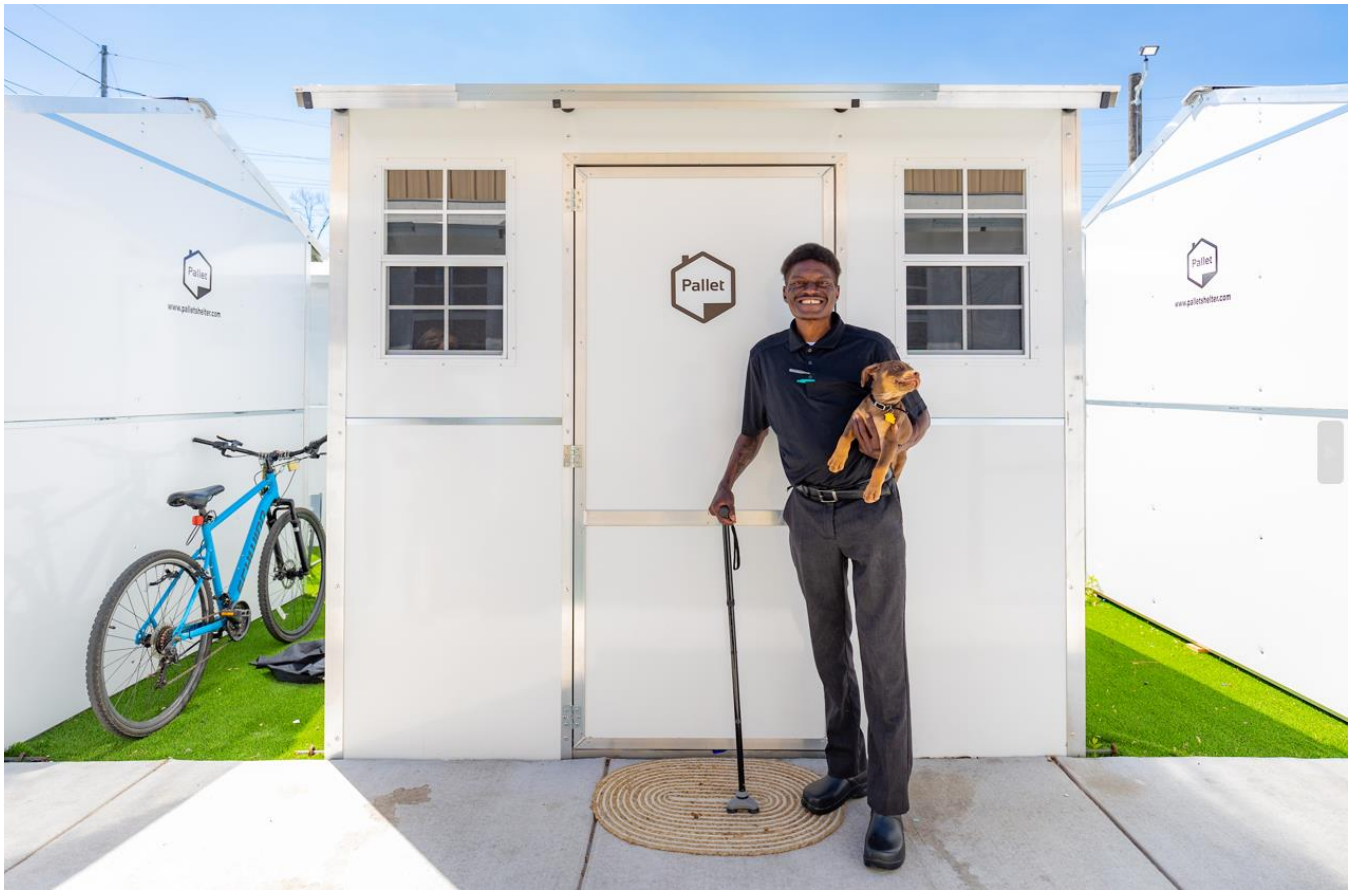

Section A: Firm Information

Company Name: Pallet PBC
Address of U.S. Headquarters and Service Office: 1930 Merrill Creek Parkway, Suite A, Everett, WA 98203
Service Office Phone Number: 425-535-4866
RFQ Contact Name/Title: Lia Azul Salaverry, Senior Manager Advisory Services
RFQ Contact Email: Email: lia@palletshelter.com
RFQ Contact Phone: 510-899-1299

Section B: Firm Qualifications and Example Projects

About Pallet PBC

Pallet was founded in 2016, with a dual mission to end unsheltered homelessness in our lifetime and to provide fair chance employment to people with lived experience. Most Pallet employees across all levels of the organization have personally experienced homelessness, substance use recovery, and/or justice system involvement. Today, Pallet has built over 110 transitional shelter villages in 21 states and 85 cities across the U.S. and Canada and has provided living wage employment to hundreds of disenfranchised people.

The PathForward Approach and Methodology

Pallet recently formalized its consulting arm, PathForward™, to support cities in developing best practices, master plans, fundraising, stakeholder relationships and coalition building, implementation planning and community engagement. Pallet's PathForward™ homelessness advisory services provides high-end, individually crafted consultation services shaped by data-backed strategies and informed by cities' most pressing needs and priorities. In 2022, Pallet began incorporating the knowledge base we have gained from our work developing shelter programs, as well as the collective knowledge of our employee base with lived experience, and our sister non-profit organization, WELD Seattle, into a formalized consulting and advisory practice. For more information about Pallet's PathForward program, including our case studies and capabilities, please visit this link.

Image 1: Pallet's Successful Reintegration Ecosystem

PathForward works to advance long and short-term strategies reflecting our *reintegration ecosystem of homelessness* – looking at effective policies, social services, economically viable opportunities, basic needs, housing supply and funding – in tandem with shelter solutions to end homelessness. Our consultation includes qualitative and quantitative analyses, and evidence-based practices to develop and execute comprehensive plans. Strategies are aimed at developing effective implementation plans that will result in both immediate and lasting progress in ending homelessness and securing safe, permanent, and affordable housing.

PathForward has broad experience spearheading plans which target the root causes and impacts of homelessness to prevent further escalation of the crisis. Our award-winning homelessness advisory services have made meaningful impacts in communities by advancing plans that are strategic, actionable, and innovative. We advance compassionate, creative strategies and evidence-based practices that produce measurable results.

Relevant Experience

Working in a vast array of different communities – from large, mid-sized and small cities, to rural, suburban, and urban communities, tribal nations and beyond – we have supported localities in numerous ways, tailored to their specific needs and dynamics. We've built partnerships with stakeholders across systems and sectors, including at the local, state and federal level. We are experts in designing master plans, best practice evaluation, community engagement and utilizing cutting-edge strategies to end homelessness. Our team has broad expertise as former developers, consultants, public policy experts, and project managers, with varied experience in government, public health/healthcare, and the nonprofit, philanthropic, and private sectors.

PathForward, since being formalized in 2022, has completed several complex projects of varied size and scope for cities in multiple states. Our PathForward consulting services, winner of the 2022 National League of Cities' (NLC) Distinguished Service to Cities Award, and winner of the NLC's Capstone Challenge, have supported cities to advance solutions to end homelessness through holistic, equity-informed, coalition-based work. For a list of PathForward's recent case studies, relevant experience, and references, please see the section below:

Example Projects

The following are recent examples of related work projects Pallet's PathForward team has completed in this field in the past five years. Please note that additional examples are available upon request.

1. **Project Name:** Regional Homelessness Needs Assessment and Implementation Plan (2022)
   - **Project Location:** Northglenn, Colorado
   - **Project Scope and Description:** PathForward conducted a comprehensive, community needs assessment which included an analysis of the current service and program landscape for homelessness in the region, provided key findings and recommendations for improvement. The report outlined immediate action plans to end unsheltered homelessness. It provided local leaders with a step-by-step implementation guidance for how the region can address encampments and provide more emergency shelter, including specific site locations, recommended service providers, best practices in program methodology, and budgets needed to bring proposed projects into fruition.
   - **Nature of Public/ Community Involvement:** During this project, PathForward interviewed dozens of city staff, service providers, and regional experts on homelessness to develop strategies. Plans are being presented to the public, the Adams County Board of County Commissioners, the Northglenn City Council, and a regional body of City Managers working to end homelessness.
   - **Outcomes:** This 50-page report also details long-term strategies to prevent homelessness, enhance collaboration among regional partners, and expand access to wrap around services and improve existing homelessness services and programs.

2. **Project Name:** Program Planning and Implementation for the Crisis Intervention Team (2022)
   - **Project Location:** Huntington, West Virginia
   - **Project Scope and Description:** PathForward performed a robust community needs assessment, resulting in seven (7) recommendations for how the City of Huntington should address its most urgent challenges, including homelessness, substance misuse, and housing in the short and long term. These recommendations were formed after conducting a series of focus groups and listening sessions. Our team led the implementation of the city's top recommendation. PathForward facilitated collaboration with community partners including local private and public healthcare institutions, first responders, and city experts to advance program development of the Crisis Intervention Team (CIT) — a mobile unit of mental health and Huntington PD professionals – equipped to handle active mental health crisis through de-escalation, providing mental health assessments, and offering critical services and referrals. Given current trends and data, we estimated that over 85% of individuals engaged by the CIT will be experiencing SUD, homelessness or both circumstances.
   - **Nature of Public/ Community Involvement:** PathForward facilitated collaboration with community partners including local private and public healthcare institutions, first responders, and city experts to

advance program development. Our team of consultants visited in-person, and conducted site visits, interviews and planning meetings with dozens of local experts, staff and homelessness stakeholders.

- **Outcomes:** As a concrete outcome of our work over 8 months, the CIT program launched in March of 2023. This program is an essential first step to aid the most vulnerable people experiencing homelessness. Longer term, PathForward's strategic planning efforts support Huntington in identifying funding streams and developing comprehensive support to provide more shelter, permanent housing, and other wholistic strategies to end homelessness. As a result of our partnership to launch a Crisis Intervention Team (CIT), the City of Huntington won the 2023 United States Conference of Mayor's Grant for Police Reform and Equitable Justice, receiving $75,000 to further scale programming.

3. **Project Name:** LakePoint Village, Utilizing Public Land for Shelter and 100% Affordable Housing (2021)
   - **Project Location:** Oakland, California.
   - **Project Scope and Description:** Partnering with unsheltered residents, constituents, homeless advocates, the City Council President, City Departments and Alameda County, Pallet launched a large-scale interim homelessness intervention -- named Lake Point Village -- on the city-owned parcel at E. 12th St. and 2nd Ave. PathForward's lead consultant Lia proposed key program elements, created guided documents and budgets, and assessed service providers, recommending Housing Consortium of the East Bay (HCEB), to manage the site. This program – located on a site that is slated for a 100% affordable housing project in the coming years – utilizes public land for public good to provide temporary housing and comprehensive, trauma-informed/harm reduction services aimed to offer relief, stabilization, and address the physical, mental, and wholistic needs of participants. See here for more information.
   - **Nature of Public/ Community Involvement:** To promote accountability and empowerment for program participants, Lia developed and instituted a model for a "Community Council," a group of stakeholders, including unhoused participants, community members, nearby business owners, and faith leaders to provide ongoing guidance and support to the program. The Community Council works with HCEB and the surrounding neighborhood to coordinate donations, community events, and volunteer opportunities. Lia also organized and led neighborhood/community meetings, and constituent engagement.
   - **Outcomes:** The Pallet village serves up to 81 homeless residents with wrap-around support services including healthcare and housing navigation, and improved amenities, such as Wi-Fi, full running water, sewer, and electricity, ADA accessible bathrooms with showers and flushing toilets on site, trash collection, 3 meals daily and access to cooking facilities and equipment.

4. **Project Name:** Development of Multiple Non-congregate Shelter Villages with Workforce Programs (2021)
   - **Project Location:** San Gabriel Valley, Los Angeles County, CA
   - **Project Scope and Description:** The San Gabriel Valley, located in Los Angeles County, CA, was a shelter desert. A swath of densely populated cities, the San Gabriel Valley Council of Governments (SGVCOG) is made up of 31 cities and unincorporated county land and operated no shelter beds in the 30-mile stretch between the cities of Pasadena and Pomona. Pallet worked with the SGVCOG and their San Gabriel Valley Regional Housing Trust (SGVRHT) to develop a program in which the SGVRHT partnered with the SGVCOG cities to open non-congregate tiny home shelter communities. The SGVRHT funded the site development where member municipalities would offer up land and contribute in-kind work from their public works departments. The SGVRHT then partnered with the County of Los Angeles for funding ongoing site operations.
   - **Nature of Public/ Community Involvement:** Presented to the Council of Government, hosted a community event featuring a shelter program preview, and advised throughout on community outreach.
   - **Outcomes:** Through this model, the City of Baldwin Park was able to build a 25-unit tiny home community equipped with hygiene and laundry facilities, security, case management offices, and a dog park for less than the cost to develop one single family residential unit in the county. After the second community was completed in the city of Montebello, Pallet partnered with the SGVRHT to develop a pilot workforce development program that provides life skills, training and work opportunities for the residents of the tiny home communities, creating a pathway to permanent housing. Pallet is currently working with

the SGVRHT on the development of their 4th tiny home community, due to the success of the previous communities in rehabilitating residents.

Please note that PathForward was recently awarded a contract with the Interagency Council on Homelessness in Savannah and Chatham County to develop a 5-year Strategic Plan to reach Functional Zero in Savannah, GA. This contract is set to be finalized and launch in August of this year.

Section C: Team Members and Qualifications

Pallet Shelter Project Team

PathForward can offer Lane County our well-rounded, highly qualified team, with experts in development, project management, and community engagement. At PathForward, we employ a customized approach to staffing to best serve our government clients and meet communities' needs. We leverage our partnerships with federal and state agencies, funder networks, policy makers, and service providers to advance strategic goals.

Partnering with Pallet means access to our company's full team of over 100 employees with diverse experience in all facets of homelessness, including its intersectional issue areas – e.g., public health, substance use, criminal justice, mental and behavioral health, domestic violence, and more. Our team structure offers a diversified and extensive mix of skill sets and expertise to best meet our client's unique needs.

Our Project Manager (PM) will serve as the primary point of contact to city partners, driving workplans and deliverables, and managing day-to-day tasks. The project team will include several other key staff from Pallet with specific expertise in development, housing and homelessness issues at-large.

Our core project team from PathForward will consist of six (6) staff members, listed below:

1. Lia Azul Salaverry, Project Manager/Lead Consultant
2. Amy King, Housing and Development Expert
3. Patrick Diller, Homelessness Program Expert
4. Edward (Ned) Herrington, Data Specialist
5. Sarah Al-Khalil, Lived Experience Subject Matter Expert
6. Talar Alexanian, Community Engagement and Government Affairs Consultant

PathForward Project Team Information

Amy King, Founder, CEO: Amy King is the founder and CEO of Pallet, an Everett, WA-based Public Benefit Corporation. They strive to improve people's lives while being a successful and profitable company. Pallet addresses unsheltered homelessness through its high-quality products and the invaluable people who produce them. They are also a fair chance employer who pays a living wage. Diversified hiring practices are vital to Pallet's success and help the company empower people who can process and problem-solve with compassion, sensitivity, and creativity. She and her husband, Brady King, started Square Peg Development in 2014, which led them to hire previously incarcerated individuals. As they heard the stories and struggles of their employees, they became passionate about removing barriers to re-entry. They sought to provide an opportunity for more individuals in transition. In 2016, they founded Weld Seattle, a non-profit corporation geared toward removing barriers to employment, housing, and a supportive community for individuals actively engaged in re-entry. Amy has a degree in Psychology and spent most of her career in Healthcare Administration, focusing on managing large surgical practices. This business experience prepared her for the opportunity of owning and operating Pallet while fulfilling her dream of working for a company that is both people-focused and profitable.

Lia Azul Salaverry, Senior Manager, Advisory Services: As the head of PathForward: Homelessness Advisory Services, Lia has been responsible for building out this program at Pallet and leading major projects. She directly liaisons with cities to support them in advancing wholistic homelessness solutions, streamlined policies and effective programs. Lia's expertise in strategic planning, research, and public policy comes from working as District Director and Policy Advisor for the City of Oakland Council President and leading special projects at the local, state, and federal government levels and within the nonprofit and philanthropic sectors. She's managed work within an array of issue areas, including supporting affordable housing development, public safety, economic and social justice, and public transportation; and countering homelessness, gender-based violence and human trafficking. Lia has extensive experience in project management, building coalitions, leading community engagement, and with proposal writing, program development and strategy.

Patrick Diller, Head of Community Partnerships: Patrick leads the revenue, impact, government affairs, PathForward teams. Mr. Diller's focus is on innovative solutions to the housing and homelessness crises and innovating how shelter and services are delivered in time of natural disasters. He is well experienced in working closely with local, state, and federal government, as well as navigating public-private partnerships and the non-profit sector. Prior to joining Pallet, Mr. Diller led a global health division for an international water product manufacturer, working with NGO's, governments and ministries of health, and the private sector to bring access to safe water treatment to over half a million people in the developing world. Mr. Diller also spent over a decade as a real estate broker and consultant, working with financial institutions like Fannie Mae and Freddie Mac on distressed asset disposition and foreclosure alternatives.

Talar Alexanian, Senior Government Affairs Manager: With years of experience shaping advocacy and policy, Talar is well-versed in crafting targeted, results-oriented strategies that advance issues and drive action. Dedicated to building connections with and for diverse communities, Talar has worked to ensure equitable access to education, public services, and basic needs security throughout her career. As a director of a public affairs firm, Talar led significant initiatives in technology, transportation, entertainment, housing, and more for clients across local government agencies, private and non-profit groups. Her skills in stakeholder engagement, grassroots mobilization, government affairs, social media messaging and event management at the local, state and federal level drove meaningful outcomes. Prior to consulting, Talar spent years advocating for affordable high-quality public higher education. As an appointee of Governor Jerry Brown on the California State University (CSU) Board of Trustees, Talar shaped policies for the largest four-year public university system in the United States. More recently, Talar led communications, advocacy and policy efforts of the University of California students at the state & federal level. Her efforts resulted in state reinvestment of public dollars to both university systems & the first decrease in UC student tuition in nearly two decades.

Sarah Al-Khalil, Customer Support Coordinator: Sarah has a passion for engaging with customers and people seeking support who are experiencing homelessness and providing solutions or connecting people with resources. Before joining Pallet Sarah experienced homelessness, substance use disorder and interaction with the criminal legal system. Sarah was president and comptroller of an Oxford community and is proud of her two years of sobriety. She approaches people and challenges using the lens of lived experience which provides thoughtful, original, compassionate ideas to address a myriad of issues. Sarah is a member of the Pallet Leadership team which provides her with the opportunity to directly influence companywide decisions.

Edward (Ned) Herrington, Data Specialist: As Pallet's GIS Data Specialist, Ned has expertise creating maps and developing geospatial data. With a Bachelor's degree in Government with a concentration in American Law from Wesleyan University, Ned has also received advanced certifications in Data Analysis, where he developed skills in GIS software. Ned's previous experience and notable projects include working on data and mapping projects including the leading database of political advertisements and contributing to a chapter of an upcoming Oxford UP publication. He excels in spatial analysis, uncovering hidden patterns and relationships within complex datasets. Ned's expertise lies in crafting visually compelling maps that effectively communicate insights, blending creativity with scientific accuracy. Meticulous in data management, he ensures the integrity and reliability of geospatial information. Ned seamlessly integrates GIS maps into diverse projects, supporting PathForward's work.

Section D: Cost Proposal

Pallet and our team of experienced consultants who make up PathForward are pleased to submit this proposal to complete an Analysis on Barriers to Affordable Housing in Lane County. We understand the challenges that homelessness leaders face in addressing the complex impacts of homelessness in Lane County.

The total cost for these services if Lane County elects to use Pallet for all functions listed in this menu is $202,950. This cost includes all expenses associated with the project, including labor and materials, travel/transportation, lodging, usual contingencies, and any other miscellaneous expenses necessary for the execution of the planning and project management services required by the Lane County. In case hours necessary for certain functions exceed our estimates, our not-to-exceed total is $225,000.

Pallet understands the importance of working within your budget constraints, and we are committed to delivering high-quality services that can meet your goals. We welcome a negotiating process to align our capabilities with Lane County's needs. Below, you will find our proposed budget for this scope of work:

Project Element	Pallet Team Hours	Cost
Conduct a Literature Review	100	$30,000
Evaluate Land Use Code Impediments	75	$22,500
Evaluate Building Code Impediments	75	$22,500
Review Processes as Lane County Land Management Division to Answer Questions	125	$37,500
Review and Evaluate Current Structure and Staffing at Lane County Land Management Division	150	$45,000
Present Findings to the Lane County Board of Commissioners	50	$15,000
Travel Budget		$12,000
10% Contingency		$18,450
	Project Total	**$202,950**

Section E: Time Schedule and Project Plans

Statement of Availability and Project Plans

PathForward is pleased to confirm our full availability and enthusiasm to participate in your RFQ submission for a Housing Barriers assessment in Lane County. Our team is ready to dedicate our expertise and resources to address your specific needs and provide valuable contributions to the project. We welcome the opportunity to discuss further details and showcase how our skills align with the objectives of this research endeavor.

Below is a high-level overview of our project plans for this RFQ.

1. Conduct a Literature Review

- **Milestone 1:** Collect relevant literature and research materials related to land use and building code regulations.
- **Milestone 2:** Analyze and synthesize the gathered information to identify key insights and best practices.
- **Outcome:** A comprehensive literature review report of no more than 10-pages to the Board of County Commissioners that highlights essential findings and recommendations for optimizing land use and building code policies.

2. Evaluate Land Use Code Impediments

- **Milestone 3:** Identify existing land use code barriers at the State and County level and their impact on development projects and community planning.
- **Milestone 4:** Conduct a comparative analysis of successful land use code implementations in other regions which aligns with Oregon's Statewide Planning Goals.
- **Outcome:** An in-depth assessment report detailing specific impediments and proposing actionable solutions to streamline land use regulations and promote sustainable development.

3. Evaluate Building Code Impediments

- **Milestone 5:** Examine current building code restrictions at the State and County level and their implications, with a specific emphasis on barriers to the construction of Accessory Dwelling Units (ADUs) and "Tiny Homes."
- **Milestone 6:** Analyze case studies of municipalities with efficient building code practices.
- **Outcome:** A comprehensive evaluation report outlining challenges within the existing building code framework and suggesting practical improvements to enhance construction processes and compliance.

4. Review Processes at Lane County Land Management Division to Answer Questions

- **Milestone 7:** Conduct in-person and virtual interviews with key stakeholders within the Land Management Division to understand current processes and challenges and answer key questions for Lane County (noted in RFQ).
- **Milestone 8:** Analyze data and operational workflows to identify areas for optimization.
- **Outcome:** A detailed process review report that provides insights into the strengths and weaknesses of current practices and proposes procedural enhancements to enhance efficiency.

5. Review and Evaluate Current Structure and Staffing of Lane County's Land Management Division

- **Milestone 9:** Evaluate the organizational structure of the Land Management Division's operational needs, including existing staffing levels and structure to determine if they meet the demands of the division's functions, and the capacity needed to process development applications within established processing timeline benchmarks.
- **Milestone 10:** Assess new and anticipated legislation, including rules around ADU's, the Governor's executive order on housing production, HUD funding for rebuilding in the McKenzie Valley, and other relevant drivers.
- **Outcome:** An organizational review report that outlines recommendations for optimizing the structure and staffing of the Land Management Division, ensuring effective resource allocation and improved performance.

6. Present Findings to the Lane County Board of Commissioners

- **Milestone 11:** Prepare a comprehensive presentation summarizing key findings and proposed solutions from all components of the project.
- **Milestone 12:** Deliver the presentation to the Lane County Board of Commissioners, addressing questions and seeking feedback.

- **Outcome:** Provide an engaging and informative presentation in-person at the Lane County Public Service Building (or remotely via Zoom) during a Tuesday Board Meeting to be scheduled. The presentation will equip the Board with actionable insights to support decision-making for future land management policies and practices.

Time Schedule

Below is a breakdown of PathForward's estimated time schedule. Dates and timeframes are negotiable, and dependent on the preferred start date determined by the Lane County team.

Component	Duration	Estimated Start Date	Estimated End Date
Conduct a Literature Review	4 weeks	September 4th, 2023	October 2nd, 2023
Evaluate Land Use Code Impediments	4 weeks	October 2nd, 2023	October 30th, 2023
Evaluate Building Code Impediments	4 weeks	October 30th, 2023	November 27th, 2023
Review Processes at Lane County Land Management Division to Answer Questions	6 weeks	November 27th, 2023	January 8th, 2024
Review and Evaluate Current Structure and Staffing of Lane County's Land Management Division	6 weeks	January 8th, 2024	February 19th, 2024
Present Findings to the Lane County Board of Commissioners	2 weeks	February 19th, 2024	March 4th, 2024
Total Estimated Project Duration	26 weeks	September 4th, 2023	March 4th, 2024

Section F: References

1. Name: Jessica Hulse, LSW, Crisis Response Unit Program Manager
    a. Entity: City of Northglenn, CO
    b. Address: 50 Community Center Drive, Northglenn, CO 80233
    c. Phone: (720) 822-0558
    d. Email: jhulse@northglenn.org
2. Name: Scott Lemley, Director of Innovation
    a. Entity: City of Huntington, WV
    b. Address: 800 Fifth Avenue, Huntington, WV 25701
    c. Phone: (304) 696-5540
    d. Email: lemleys@huntingtonwv.gov
3. Name: Brielle Salazar Acevedo, Regional Housing Trust Administrator
    a. Entity: San Gabriel Valley Council of Governments
    b. Address: 1333 S. Mayflower Ave, Suite 360 Monrovia, CA 91016
    c. Phone: (626) 457-1800
    d. Email: bsalazar@sgvht.org

Additional references or letters of support are available upon request.

Thank you for your consideration. Pallet's PathForward team is grateful for the opportunity to submit this proposal to Lane County. Our staff would be pleased to answer any questions you may have. We welcome you to contact: Lia Azul Salaverry – Senior Manager, Advisory Services at (510) 899-1299 or Lia@palletshelter.com.

Proposal

for

Analysis on Barriers to Affordable Housing in Lane County

Bid Solicitation #S-C00200-00007459

July 24, 2023, 5:00 PM PST

SUBMITTED TO:

Keir Miller, LMD Manager keir.miller@lanecountyor.gov

Lane County Oregon Public Works Department

3040 N. Delta Hwy

Eugene, Oregon 97408

SUBMITTED BY:

Operational Excellence Strategies, LLC. (MBE/DBE/SBE, WOSB)

POC: Ms. Karin L. DeLaitsch, CEO/Founder

9009 Elmonte Woods Way, Ellicott City, MD 21042

Phone: 608-358-0588

Email: kdelaitsch@opxstrategies.com

CAGE: 84NK4 SBR CERTIFICATION: SN23-033424 MBE/DBE/SBE #19-572

TIN: 83-1016837

This submission includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this submission. If, however, an award is made to this offeror as a result of – or in connection with – the submission of these data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the submission. This restriction does not limit the Government's right to use information contained in these data if it is obtained from another source without restriction.

(608) 358-0588
Ellicott City, MD 21042
opxstrategies.com

July 24, 2023

Keir Miller, LMD Manager
Keir.Miler@lanecountyor.gov
Analysis on Barriers to Affordable Housing in Lane County
RE: Bid Solicitation #S-C00200-00007459

Dear Keir Miller,

Operational Excellence Strategies, LLC. (Dba: OpX Strategies) is pleased to submit this proposal to the Lane County, Oregon Public Works Department in response to Bid Solicitation #S-C00200-00007459 regarding the Analysis on Barriers to Affordable Housing in Lane County. The proposal addresses all of the points proposed in the RFQ Scope of Work.

OpX Strategies is a financially stable, Maryland-based woman-owned, minority, disadvantaged, small business enterprise (WOSB, MBE/DBE/SBE) which provides management consulting services to the public and private sectors. We are further able to respond to this bid with in-person as well as remote operations out of our service office in Benton County, Oregon.

In the attached submission, you will find an ordered and formatted response to each of the specified requirements in the RFQ. The proposal contains OpX Strategies firm information and qualifications with relevant projects, as well as a description of the team members with their qualifications relevant to the successful completion of this contract. Accompanying this section is a cost proposal showing the estimated hours and cost for each item listed in the RFQ Scope of Work, with a statement of availability and an estimated time schedule for completion of the project in its entirety. Concluding the document are references for the aforementioned example projects. In addition to the contents of this document, OpX Strategies acknowledges receipt of responses to questions on July 19, 2023.

As a certified Project Management Professional (PMP) and the point-of-contact for this proposal, I look forward to offering the best possible value and results for this solicitation to the Lane County Public Works Department, as well as a clear and consistent line of communication throughout the project. On behalf of the team at OpX Strategies, we look forward to working with you on this effort. Please use my contact information below for any questions regarding the contents of this proposal.

Sincerely,

Karin L. DeLaitsch

Operational Excellence Strategies, LLC. (WOSB, MBE/DBE/SBE)
Karin DeLaitsch, PMP, CEO/Founder
Ph: 608-358-0588, Email: kdelaitsch@opxstrategies.com
Visit our website: www.opxstrategies.com

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A. FIRM INFORMATION

Company Name: Operational Excellence Strategies, LLC (Dba OpX Strategies)
Address of U.S. Headquarters: 9009 Elmonte Woods Way, Ellicott City, MD 21042
Address of Service Office: 2540 Newton St., Philomath, OR 97370
Service Office Phone Number: (240) 841-4682
RFQ Contact Name/Title: Karin DeLaitsch, CEO/Founder
RFQ Contact Email: kdelaitsch@opxstrategies.com
RFQ Contact Phone: (608) 358-0588

B. FIRM QUALIFICATIONS WITH EXAMPLE PROJECTS

Operational Excellence Strategies, LLC. (Dba: OpX Strategies) is pleased to submit this proposal to the Lane County Oregon Public Works Department in response to Bid Solicitation #S-C00200-00007459 regarding the Analysis on Barriers to Affordable Housing in Lane County.

OpX Strategies is a women-owned, minority, disadvantaged, small business enterprise (WOSB, MBE/DBE/SBE) which provides management consulting services to the public and private sectors. Karin DeLaitsch, OpX Strategies' CEO and Founder has performed work for General Motors, The Department of the Treasury, The Department of Veterans Affairs (VA), Montgomery College, National Institutes of Health (NIH), National Transportation Safety Board (NTSB), Railroad Retirement Board (RRB), AmeriCorps, and National Credit Union Administration (NCUA).

OpX Strategies specializes in barrier analysis, business process improvement, workforce planning/analysis, and funding allocation. We have specific abilities to carry out the analysis of barriers on affordable housing based on successful completion of past work as exemplified in the project references below. OpX Strategies will conduct in-person business via our service office in Benton County, OR, as well as virtually. Quality is assured through ongoing communication with the assigned Point of Contact (POC) and frequent status check-ins and meetings as necessary or requested. Work will be performed largely remotely concerning data collection and code analysis, with interviews issued in-person or online via assigned staff in Oregon.

EXAMPLE PROJECT #1

Contract Title: National Transportation Safety Board Diversity, Equity, Inclusion, and Accessibility Barrier Analysis
Customer: National Transportation Safety Board (NTSB)
Customer: National Transportation Safety Board
Brief Description of Contract: This project required a literature review, an evaluation of triggers (i.e, red flags), and identification of barriers impeding equal employment opportunities for members of particular groups based on their race/ethnicity, gender, and disability status. Recommendations to eliminate or mitigate barriers were presented to NTSB Executive Leadership by Karin DeLaitsch. The project required quantitative statistical analysis to identify the scope and specifics of the underrepresentation of diverse groups, and several types of qualitative analysis to understand the factors contributing to the lack of diversity and to develop solutions.
Relevancy of Work: The team led by Karin DeLaitsch, Project Manager, conducted a barrier analysis, and identified policies, procedures, practices, or conditions, that limit or tend to limit equal

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Contract Title: National Transportation Safety Board Diversity, Equity, Inclusion, and Accessibility Barrier Analysis
employment opportunities for members of a particular group based on their race/ethnicity, gender, and disability status. Tasks included external literature research, statistical analysis, and focus group interviews. Deliverables included a Final Barrier Analysis Report, an Executive Leadership presentation, and Barrier Analysis training.
Successes and Difficulties: No difficulties. Success realized: • Identification of recruitment, hiring, promotion, training/development, and retention triggers that may lead to potential barriers • Root cause analysis of barriers • Prioritized recommendations to eliminate or mitigate barriers

EXAMPLE PROJECT #2

Contract Title: State Approving Agency Manpower and Budget Allocation Model
Customer: U.S. Department of Veterans Affairs (VA) Veterans Benefits Administration (VBA) Education Service
Brief Description of Contract: Identified workload parameters and developed an Excel-based Cost Allocation Model with 'what-if' scenario capability and built-in dashboard to distribute fairly and equitably $28 million to State Agencies monitoring the distribution of education benefits. The model is used to annually determine state funding allocations.
Relevancy of Work: This project required interpretation and adherence to Federal and State legislation and regulations, President's Executive Orders, and case law. Karin DeLaitsch, Project Lead, reviewed state agency staffing structure and staff roles/responsibilities/workloads to establish a fair and equitable annual funding allocation model based on VA's federal budget allocation.
Successes and Difficulties: No difficulties. Successes realized: • Identified workload parameters and developed an Excel-based Cost Allocation Model with 'what-if' scenario capability to distribute fairly and equitably $28 million to State Agencies monitoring the distribution of education benefits. • Developed the business case for VA to justify an additional $6 million be added to the Federal Budget request to address new workload parameters due to new policies, legislation, and regulations. • Worked with 53 State Agencies to document approval and compliance requirements for institutions of higher learning, non-college degree facilities, apprenticeship, on-the-job training, and flight schools. • Addressed an Inspector General Report on state educational program approval and compliance deficiencies by creating Standard Operating Procedures, Approval Requirements Checklists, and a Quality Assurance Surveillance Plan. • Developed Performance Requirements Standard metrics for Quality Assurance Reviews to measure performance.

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EXAMPLE PROJECT #3

Contract Title: Treasury Surety Bonds and Judgment Fund Business Process Improvement

Customer: U.S. Department of the Treasury

Brief Description of Contract: Completed baseline state analysis, future state recommendations, implementation plans, and standard operating procedures for two departments: Judgment Fund and Surety Bonds. Documented process flows and decomposed processes into specific measurable activities to meet processing time benchmarks.

Relevancy of Work: Karin DeLaitsch, Project Lead, reviewed the Bureau of Fiscal Service's processes to increase production, improve delivery time, reduce costs, and set priorities for implementing improvements.

Successes and Difficulties: No difficulties. Successes realized:

Surety Bonds Business Process Improvement (BPI)

- Improved the financial and regulatory review process for 300+ Surety Companies from a highly intensive paper system to an electronic documentation review/approval process resulting in new roles for the reviewer, analyst, and approver.
- The business process improvement not only eliminated the storage of paper records for 300+ companies submitting financial documents on a quarterly and annual basis, but it improved the financial analyst's overall review time by 700%.

Judgment Funds BPI

- Analyzed baseline state processes, performed lean analysis and error proofing on workloads and workflows, then developed and implemented future state processes.
- Met targets for reducing outstanding Judgment payments over 30 days.
- Reduced errors to acceptable quality levels by assuring the appropriate citation with appropriate supporting documentation.
- Streamlined the communication channel to the wide array of submitting agencies regarding claim status.
- Provided client with an executable implementation plan which led to further task orders for LoS.
- Worked jointly with the Change Management Team to prepare and communicate standard operating procedures and training materials.

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C. TEAM MEMBERS WITH INDIVIDUAL QUALIFICATIONS

Karin DeLaitsch, PMP (Project Director)

Role: *Oversees direction of short-term studies, the design, review, and evaluation of systems, and provides management support. Provides subject matter expertise and technical guidance on barrier analysis, business process improvement, workforce planning/analysis, and funding allocation.*

Qualifications: Karin is a dedicated strategic and operational excellence professional with over 24 years' progressive experience driving planning, programming, and transformation initiatives in the private and public sectors. She has eleven years of experience managing government contracts, as well as the technical project teams working on the contracts. She is well-versed in delivering quality reports and managing projects and contracts. Her workforce analytics and Diversity, Equity, Inclusion and Accessibility (DEIA) work has included Workforce Analytics Lead for the National Institutes on Health (NIH) Office of Equity, Diversity, and Inclusion's DEIA Trend & Barrier Analysis project, Project Manager (PM) for AmeriCorps' Workforce Analysis, PM for National Transportation Safety Board's DEIA Barrier Analysis, PM for National Credit Union Administration's DEIA Barrier Analysis, PM for U.S. Railroad Retirement Board's DEIA Solution. She was Project Lead for business process design and improvement work for U.S. Department of the Treasury's Bureau of Fiscal Services Business Process Improvement projects within the Surety Bonds and Judgment Fund departments, as well as numerous process design/improvement projects during her thirteen years at General Motors as an Industrial Engineering General Supervisor. For the Department of Veterans Affairs, she has developed five-year strategic workforce plans for 150K+ employees, developed a cost allocation model to distribute $28 million to State Agencies, developed program management plans for Veterans Health Administration's Office of Quality, Safety and Value – Product Effectiveness, and created a customer survey dashboard for the VA Office of Procurement and Logistics.

Victoria Chavez (Senior Analyst and Advisor)

Role: *Provides business and analytical expertise in support of the project. Prepares the overall designs and detailed specifications for system components. Offers knowledge, experience, and insight on project topics.*

Qualifications: As a Licensed Property Manager in the state of Oregon and an active member of the Linn-Benton Rental Housing Association, Ms. Chavez is also the owner of Fulcrum Property Management, a small, woman-owned business committed to high-quality management of long-term rental properties across Benton County. Her company focuses on filling vacancies and managing single, small multifamily, and ADU residences, providing her with a deep understanding of local market needs, demand, and factors including pricing, housing conditions, and tenant pool. Her properties house a variety of tenants ranging from small to large families, students, single parents, retirees, and HUD voucher recipients. She also works to coordinate the updating and upgrade of properties to ensure their suitability as high-quality rentals and is in close communication with housing owners and investors regarding their needs, desires, and concerns in their ability to provide housing in the current market and regulations. Her role as advisor on this project stems from her firsthand understanding of the ongoing high demand for quality housing and the apparent lack of supply in regional markets, as well as her training and expertise in local housing regulations and communications experience with local housing development authorities. She is highly motivated to continue to focus her work on identifying and developing solutions to this shortage in nearby communities.

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David DeLaitsch (Team Lead and Lead Researcher/Analyst)

Role: *Responsible for conducting the project in a timely manner, ensuring the quality of work products, maintaining financial soundness of the project, managing interactions, and reporting progress and issues. Leads research efforts, conducts interviews, collects/analyzes data to identify findings, makes recommendations, and prepares documentation, reports, and presentations.*

Qualifications: Mr. DeLaitsch has focused on research and data analysis for OpX Strategies since 2021, producing data-driven visual dashboards to highlight critical findings and results. He has conducted external research, summarized findings, performed statistical analysis, and processed survey results. He expertly summarizes findings in user-friendly and easily interpreted visually graphic reports and presentations. He is dedicated to producing quality work driven by supporting research and excelling in the analysis and comprehensive review of documents founded on an M.S in physical sciences.
Other work for OpX Strategies has included the simplification of previously outdated or laborious tasks including streamlining scenario capabilities to speed executive decision-making and streamlining data cleaning and data verification processes. He is also versed in authoring proposals, coordinating submissions, and managing budgets.
In addition to employment with Operational Excellence Strategies, David currently consults for Fulcrum Property Management and is an active member of the Willamette Valley Real Estate group. He is personally committed to developing and improving properties in local markets of the central Willamette Valley.

TBD (Subject Matter Expert - Level I)

Role: *Provides high-level expertise on land use codes, zoning and building codes at the state and county level, expertise in affordable housing issues particularly pertaining to Accessory Dwelling Units (ADUs) and 'Tiny Homes.'*

TBD (Subject Matter Expert - Level III)

Role: *Legal advice in the context of applicable laws and regulations including expertise regarding ADUs, the Governor's Executive Order on housing production, HUD funding for rebuilding in the McKenzie Valley, land use codes, zoning, and building codes.*

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D. COST PROPOSAL WITH ESTIMATED HOURS AND COST/TASK

Task	Task Description	Project Director Labor Hours	Team Lead & Lead Researcher /Analyst	Senior Analyst /Advisor	Subject Matter Expert Level I	Subject Matter Expert Level III	Total Labor Hours
1	Subtotal Task 1 - Conduct a Literature Review	56	276	108	37	2	479.00
2	Subtotal Task 2 - Evaluate land use code impediments	32	60	48	64	8	212.00
3	Subtotal Task 3- Evaluate building code impediments	32	60	48	64	8	212.00
4	Subtotal Task 4- Review 6-8 processes a Lane Cty's Land Mgmt Division and Land Code	52	184	132	40	2	410.00
5	Subtotal Task 5: Review and evaluate current structure and staffing of Lane Cty Land Mgmt Division	36	92	76	16	0	220.00
6	Subtotal Task 6 - Present Findings to the Lane Cty Board of Commissioners	96	136	84	28	4	348.00
	Total Labor Hours	304	808	496	249	24	1881.00
	Hourly Labor Rate (Fully loaded)	$175.00	$119.00	$112.00	$150.00	$300.00	
	Full Time Equivalent (FTE)	0.16	0.42	0.26	0.13	0.01	0.98
	Task 1 Cost	$9,800.00	$32,844.00	$12,096.00	$5,550.00	$600.00	$60,890.00
	Task 2 Cost	$5,600.00	$7,140.00	$5,376.00	$9,600.00	$2,400.00	$30,116.00
	Task 3 Cost	$5,600.00	$7,140.00	$5,376.00	$9,600.00	$2,400.00	$30,116.00
	Task 4 Cost	$9,100.00	$21,896.00	$14,784.00	$6,000.00	$600.00	$52,380.00
	Task 5 Cost	$6,300.00	$10,948.00	$8,512.00	$2,400.00	$0.00	$28,160.00
	Task 6 Cost	$16,800.00	$16,184.00	$9,408.00	$4,200.00	$1,200.00	$47,792.00
	Total Cost	$53,200.00	$96,152.00	$55,552.00	$37,350.00	$7,200.00	$249,454.00

Total Cost: $249,454.00

Estimated Hours/Task and Cost/Task: See Yellow Highlights in Table Above

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E. AVAILABILITY STATEMENT AND ESTIMATED TIME SCHEDULE

OpX Strategies will provide sufficient personnel to perform the requirements of the tasks/subtasks as stated in the Statement of Work. A Project Point of Contact will be available virtually and/or in-person during core business hours Monday-Friday from 9:00 AM – 5:00 PM PT except during state holidays.

The Scope of Work tasks proposed in the RFQ will be completed on the following **estimated time schedule of 52 weeks** of tasks and subtasks:

Task	Task Description	Schedule (Week #)	Deliverable (*)
1	Develop Evaluation Strategy, Project Management Plan, Kickoff Meeting	1 - 2	
1	Status Reports/Meetings	ongoing	
1	Data Request and Internal/External Information Gathering	2-9	
1	Literature Review	9 - 10	
1	Literature Review Report	11 - 12	*
2	Identify Triggers (red flags) that may cause Potential Barriers	13 - 14	
2	Evaluate Barriers using Root Cause Analysis	15 - 16	
2	Identify Recommendations to Eliminate or Mitigate Barriers to Land Use Code	17	
3	Identify Triggers (red flags) that may cause Potential Barriers	18 - 19	
3	Evaluate Barriers using Root Cause Analysis	20 - 21	
3	Identify Recommendations to Eliminate or Mitigate Barriers to Building Code	22	
4	Identify Processes to Evaluate (6 to 8)	23	
4	Conduct Interviews	24 - 25	

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Task	Task Description	Schedule (Week #)	Deliverable (*)
4	Map Current State	26	
4	Identify Process Improvements to answer SOW questions	27 - 28	
4	Map Future State of Processes at Lane County's Land Mgmt. Division and Land Code	29	
5	Conduct Interviews	30 - 34	
5	Identify and Document Current State (funding, staffing levels, processing benchmarks)	35 - 39	
5	Conduct Key Driver Analysis	40 - 41	
5	Define and Document Future State of Lane County Land Mgmt. Division's structure and staffing	42 - 43	
6	Analysis of Findings	44 - 47	
6	Develop Recommendations	48 - 49	
6	Summarize Findings/Recommendations	50 - 51	
6	Prepare and Deliver Presentation to Lane County Board of Commissioners	51 - 52	*

Time to Completion: 52 weeks

Deliverable Due Dates:

1. Task 1 - Literature Review Report: 12 weeks from start of contract.
2. Task 6 - Presentation to Lane County Board of Commissioners: 52 weeks from start of contract.

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F. REFERENCES

REFERENCE #1 FOR EXAMPLE PROJECT #1

Contract Title: National Transportation Safety Board Diversity, Equity, Inclusion, and Accessibility Barrier Analysis
Customer: National Transportation Safety Board
Contract # GS02F0092T Task Order Number: 9531BM21F0093
Period of Performance: September 27, 2021 – August 26, 2022
Reference for Karin DeLaitsch, OpX Strategies: Work performed for prime contractor, Economic Systems Inc.
POC: Fara Guest, Director, Office of EEO Diversity & Inclusion, email guestf@ntsb.gov

REFERENCE #2 FOR EXAMPLE PROJECT #2

Contract Title: State Approving Agency Manpower and Budget Allocation Model
Customer: U.S. Department of Veterans Affairs (VA) Veterans Benefits Administration (VBA) Education Service
Contract # GSA-10F-0238X / VA – 36C10D20F0007
Period of Performance: 29 Sep 2020 – 28 Sep 2025
Reference for Karin DeLaitsch, OpX Strategies: Work performed for the prime contractor, WP Cioffi Engineering Management
POC: Janice Fisher, VA Education Service Program Manager, email Janice.fisher1@va.gov

REFERENCE #3 FOR EXAMPLE PROJECT #3

Contract Title: Treasury Surety Bonds and Judgment Fund Business Process Improvement
Customer: U.S. Department of the Treasury
Contract # TPDARCBPA120002
Period of Performance: April 6, 2015 – April 6, 2017
Reference for Karin DeLaitsch: Work performed for prime contractor, Line of Sight, LLC.
POC: Jon Weinstein, Line of Sight, LLC email jon.weinstein@gmail.com

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