

NORTH MACADAM TSDC OVERLAY

Statement of the Work and Payment Schedule

Henderson, Young & Company, with assistance from Fehr & Peers/Mirai, Parametrix, Galardi Consulting, and Words by Mallaris (collectively “the Consultant”) will provide the following services in order to develop a Transportation System Development Charge overlay (“TSDC overlay”) for the North Macadam area of the City of Portland (“the City”).

WORK PLAN

21. ADDITIONAL MEETINGS

21.1 The Consultant will meet with the SAC to serve as a resource to SAC discussion of the funding of North Macadam transportation improvement projects. The Consultant will repeat the presentation of the previous memo on funding options, assist with additional discussion and provide education on transportation funding for SAC members.

<i>Points of Input and/or Review:</i>	Staff will attend the SAC meeting.
<i>Results/Work Products:</i>	21.1 Presentation materials including copy of previous memo.
<i>Consultant Team Members:</i>	HYCo: Young

21.2 The Consultant will attend briefings with City Commissioners to assist in presentations, and respond to questions about the proposed TSDC overlay for North Macadam. The briefings will focus on the TSDC overlay as one funding tool among many, how it supports continued development in the District, and leverages other funds.

<i>Points of Input and/or Review:</i>	Staff will attend and lead the briefings
<i>Results/Work Products:</i>	21.2 Presentation notes.
<i>Consultant Team Members:</i>	HYCo: Young Parametrix: Sharpe

21.3 If requested by the City, the Consultant will attend a second City Council meeting about the proposed TSDC overlay for North Macadam. The Consultant will participate in presentations and answer questions from the City Council. This is a contingency item that requires explicit authorization by the City’s project manager.

<i>Points of Input and/or Review:</i>	Staff will attend the City Council meeting.
<i>Results/Work Products:</i>	21.3 Presentation materials.
<i>Consultant Team Members:</i>	HYCo: Young Parametrix: Sharpe

21.4 If requested by the City, the Consultant will attend a third City Council meeting about the proposed TSDC overlay for North Macadam. The Consultant will participate in presentations and answer questions from the City Council. This is a contingency item that requires explicit authorization by the City’s project manager.

<i>Points of Input and/or Review:</i>	Staff will attend the City Council meeting.
<i>Results/Work Products:</i>	21.4 Presentation materials.
<i>Consultant Team Members:</i>	HYCo: Young Parametrix: Sharpe

22. EXTRA VERSION OF TSDC CALCULATIONS AND RATE STUDY

22.1 If requested by the City, the Consultant will prepare revised TSDC calculations and a revised final report to present the methodology, formulas, variables, data, capital improvement project list and calculations of the North Macadam TSDC overlay. This “rate study” can be adopted by reference in the ordinance, and can be updated by the City as circumstances warrant. The North Macadam TSDC overlay will be based on the same ordinance, waivers, discounts, etc. as existing Citywide TSDC, except that no TOD discount will be included. This is a contingency item that requires explicit authorization by the City’s project manager.

<i>Points of Input and/or Review:</i>	Staff will review the cost allocations, costs per trip, the TSDC rates for land use types, and the rate study.
<i>Results/Work Products:</i>	22.1. Final rate study with project list, cost allocation, cost per trip, TSDC rates for specific land uses, and appendix with Capital Improvement Program.
<i>Consultant Team Members:</i>	HYCo: Young F&P/Mirai: Samdahl, Janarthanan

23. MISCELLANEOUS

- Hard copy and electronic copies of all deliverables must be in software formats acceptable to the City, such as Arc Map, Power Point, Excel, Word, and Access
- Contractor must submit a Monthly Subconsultant Payment and Utilization Report by the 15th of each month.

COST

The following table presents the costs for developing the SoWa TSDC overlay.

Task	Total
21.1. SAC Meeting	\$ 2,500
21.2. Commissioner Briefings	7,000
21.3. Second Council Meeting	3,300
21.4. Third Council Meeting	3,300
22.1. Extra Calculations and Rate Study	15,900
Total	32,000

The Contractor shall submit monthly invoices to the City. Each invoice shall be accompanied by a monthly progress report, as required by Section 23 of the Standard Contract Provisions, and a

Monthly Subconsultant Payment and Utilization Report as specified in the list of deliverables to be provided by Contractor. The amount of the monthly invoice shall be based on the hours of consulting services and hourly rates, plus itemized direct expenses incurred by the Contractor.

The person-hours for consulting services of key project consultants are listed below for each major task. These forecasts do not include person-hours of technical or clerical staff, nor of professionals who will have minor roles in the project.

Task	RY	DS	NJ	SS	Total
21.1. SAC Meeting	12				12
21.2. Commissioner Briefings	24			10	34
21.3. Second Council Meeting	12			4	16
21.4. Third Council Meeting	12			4	16
22.1. Extra Calculations and Rate Study	8	38	50		96
TOTALS	68	38	50	18	174

The following table lists the project consultants whose hours are listed above. The table below also lists each consultant's hourly rate.

Consultant Name and Firm	Hourly Rate
RY: Randy Young • Henderson, Young & Company	\$ 205
DS: Don Samdahl • F&P/Mirai	185
NJ: Natarajan Janarthan • F&P/Mirai	175
SS: Sumner Sharpe • Parametrix	201