



## Statement of Work Rhode Island Avenue NE – Great Streets Initiative Strategic Development Plan

### BACKGROUND

On behalf of the District of Columbia's Great Streets Initiative, the Office of the Deputy Mayor for Planning and Economic Development ("DMPED") seeks an Real Estate/Market Advisory and Urban Design/Planning Consultant Team ("Contractor") to conduct a economic development and community engagement process for the commercially zoned properties along Rhode Island Avenue NE corridor in the District of Columbia's Ward 5. Rhode Island Avenue NE is one of two corridors which were recently added to the District's Great Streets Initiative. Great Streets seeks to leverage public actions and investments into new private investments and development along major corridors. The final Rhode Island Avenue NE/Great Streets plan will provide an implementation framework for public and private investment in a broad range of areas, leading to neighborhood stabilization and revitalization over a ten year horizon.

The Contractor selected by the District to complete this work must demonstrate that they have at least five (5) years experience in completing the types of tasks set forth below in this solicitation.

### GOALS

The purpose of the Strategic Development Plan is to assist the District and stakeholders in achieving four (4) overarching goals:

- a. **To establish a realistic Great Streets development program and investment strategy** for Rhode Island Avenue NE which leads to private and not-for-profit investments and development activity on commercially zoned properties;
- b. **To create a distinct corridor & station area plan with a massing scenario** that becomes an economic incentive for development of convenience and other retail, housing (particularly affordable, workforce housing, and artist/live work), cultural and office uses while highlighting opportunities for assemblage and infill development attractive to prospective investors.
- c. **To determine a detailed implementation strategy** that outlines the roles and responsibilities of public and private stakeholders and includes recommendations for site acquisition, existing land owner plus developer partnerships, development programming, phasing, and financing; and
- d. **To outline the fiscal and economic impact of new investment** in the following areas: zoning modifications; total area and corridor retail and commercial property square footage; property values and tax revenue; projected full time equivalent and construction jobs; estimated sales tax revenues (where possible); and number of potential market rate and affordable rental and ownership households created.

### PROJECT COMPONENTS

TORFP for Rhode Island Avenue NE Great Streets Strategic Development Plan  
RFP No.: DCEB-DMPED-08-TORFP-99884-RhodeIsland-01

DMPED, other District agencies and the stakeholders of the Rhode Island Avenue NE Corridor need recommendations aimed at addressing the following issues:<sup>1</sup>

- Real Estate Development & Design
- Land Use and Zoning (including potential of an inter-jurisdictional Arts District)

DMPED strongly expects that recommendations will be based on a number of key scope factors, in particular, current trends in real estate acquisition and construction costs. Other relevant factors include the ability of the private sector to achieve reasonable development returns in the current and projected economic climate using non-District resources and the potential of some public subsidies being made available for strategic use along the corridor.

**NOTE:** As *Great Streets* is a multidisciplinary approach to corridor improvement, the District Department of Transportation (DDOT) is responsible for defining, improving, and maintaining the public realm of the *Great Streets* corridors, accommodating travel demands of future growth and development, and improving overall mobility and safety. To this end, DDOT has committed more than \$100 million over the next four years as physical investments in the first seven corridors, but no funding is budgeted for infrastructure improvements on Rhode Island Avenue NE at this time. Recommendations from this analysis are expected to provide a framework for determining future land uses which will impact infrastructure performance.

#### **SCOPE OF WORK**

#### **PROJECT AREA**

The project area includes commercial land use zones on Rhode Island Avenue NE from 3<sup>rd</sup> Street NE to Eastern Avenue NE.

The District has preliminarily defined three initial sub-areas located within the project area. The sub areas are:

- Rhode Island Metro (3<sup>rd</sup> Street NE to 10<sup>th</sup> Street NE and Franklin Street NE to Brentwood Road NE)
- Brentwood Road NE/13<sup>th</sup> Street NE to South Dakota Avenue NE
- South Dakota Avenue NE to Eastern Avenue NE

#### **DELIVERABLES OVERVIEW**

The contractor shall deliver the following:

1. A “phasing plan” that provides a concise, thorough, implementation-oriented, step-by-step strategy for redevelopment of key commercially zoned properties on Rhode Island Avenue NE and environs to achieve the redevelopment goals of this solicitation;
2. A corridor specific market analysis update for the Project Area based on the criteria contained herein and as directed by DMPED. In the area from South Dakota Avenue NE to Eastern Avenue NE, DMPED is particularly interested in the feasibility and marketability of an inter-jurisdictional “Arts District” with the City of Mount Rainier.
3. Comparable real estate sales analysis and projected construction estimates for similarly located projects with similar construction standards;

4. Alternative conceptual site redevelopment plans and use programs for the Project Area which illustrate development opportunities per the (a) matter of right zoning, (b) PUD with maximum allowable zoning under the Comprehensive Plan, and (c) a preferred development alternative;
5. Economic / feasibility analysis and tax increment financing feasibility analysis with strategic funding and implementation recommendations for each phase of the conceptual and the preferred development alternatives; and
6. Technical memorandum that describes the environmental constraints and opportunities, and how sustainable development principles - including building orientation, storm water, and energy efficiency - are included in the corridor plan.

## TASKS & DELIVERABLES

Outlined below are required tasks to be performed by the Contractor with coordination from the District of Columbia agencies and area stakeholders. This multi-phased effort will ultimately produce a final plan and development/implementation strategy. Client group work sessions will be structured according to this outline.

### TASK 1: EXISTING CONDITIONS ANALYSIS

- Task 1.1  
Existing Conditions  
The Contractor shall:
  - Review, analyze and map (where possible) the following base information and existing conditions:
    - History of the Corridor and its existing historic resources
    - Existing zoning affecting the area, including any major new zoning rulings and related policy
    - Land use patterns
    - Inventory of existing businesses, including physical condition, ownership, total square footage and typology
    - Inventory of existing structures including, physical condition, ownership, total square footage and typology
    - Inventory of public properties and facilities
    - Current development activity
    - Existing Infrastructure (including traffic flow and conditions)
    - Planned improvements
    - Parking, pedestrian movement and bicycle patterns
- Task 1.2  
Corridor and Sub-Areas Market Analysis  
The Contractor shall:
  - Research and document comparable real estate sales, including locations, previous and new owner names, sale amounts, land areas and zoning per sale; recent and projected construction cost estimates for projects within similar District locations and with projected similar construction standards; and quantify which development projects received public assistance for implementation.

- Based on the comparables analysis above, rank which Rhode Island Avenue NE sites and assemblages of parcels are most to least likely to produce development pads (“the pads”) similar in character to those found in the comparables analysis.
- Prepare real estate market projections for the Project Area for a use program that includes market rate, affordable/workforce and live/work artist housing (both rental and ownership); local and anchoring retail (including arts retail or outlets); commercial office; and other community amenities.
- Analyze the impact that any potential zoning changes might have had in reducing the amount of public subsidy in comparable projects and quantify the impact.
- Include proposed commercial and retail lease-up, absorption and occupancy as well as projected housing / residential rental rates and sales prices for recommended uses.
- Include a summary of statistical information about how the components of the redevelopment project will operate successfully including a focus on real estate statistics, demographic trends, housing tenure trends (rental and ownership), transit ridership, and required and preferred project specific and public parking availability. The Team shall also incorporate information about proposed, current and projected public, private and not-for-profit area development and investments. DMPED, Office of Planning, Washington DC Economic Partnership, District Department of Transportation, etc. can provide the majority of the latter.
- Provide needed graphics and charts to illustrate the primary and secondary market areas by relevant census tracts as needed.
- Provide specific recommendations about how the District might attract preferred medium and high productivity anchor and local retail uses to the Redevelopment project and surrounding neighborhood. This recommendation shall be made after thorough consideration of the range of planned public and private investments within the Project Area to determine how those strategic investments would strengthen the District’s ability to attract preferred users.
- Project the modal split of patrons who arrive in the Project area by transit (bus and rail), bicycle, and automobile. The market analysis must recommend the amount of complementing parking needed at this transit location to support project specific and existing business growth and development. Greater emphasis shall be placed on increasing transit usage (via bus and rail).

**Task 1 Deliverables:**

- A. Existing Conditions analysis/report including maps
- B. Electronic and 10 hard copies of the Corridor and Sub-area Market Analysis

*Deliverables for Task 1 are due 6 weeks from award of contract.*

## TASK 2: REAL ESTATE DEVELOPMENT & DESIGN

The Contractor shall:

- **Task 2.1**
  - Conduct a meeting with the property owners of the commercially zoned pads and other commercially zoned sites (where applicable) to discuss findings from Task 1, to determine their collective and individual willingness and capacity to redevelop their sites with a mix of uses.
  - Using the Ranking of Pads from Task 1 and the results of the property owner meeting above, create a development program and implementation strategy (including pro forma analysis) for each pad site, and others as advised by DMPED, based on existing zoning or proposed zoning modifications. Pro forma analysis should assume conventional private lending standards, generally excepted equity contribution (including expected land contribution values). Project gap financing needs should be outlined.
  - Prepare conceptual/illustrative site plans and renderings, including massing diagrams, of each redevelopment opportunity site
  - Reconvene a follow up meeting with property owners to review development program and implementation findings.
  
- **Deliverables for Task 2**
  - Draft Redevelopment Framework Plan for redevelopment opportunity sites by sub-area
  - Real Estate and Market Analysis Report (broken-down by sub-area)
  - Conceptual/Illustrative site plans, renderings, and diagrams

*Deliverables for Task 2 is due 12 weeks from award of contract.*

## TASK 3: MEETINGS, OUTREACH AND COMMUNICATION TOOLS

The Contractor shall:

- **Task 3.1**
  - Formulate and implement a comprehensive public outreach strategy that will maximize public participation in this multi-stakeholder planning process. This strategy will provide both the consultant and the District with a mechanism that will allow for an open-ended process for communication with the various stakeholders and a meaningful exchange of ideas between all interested parties.
  
- **Task 3.2**
  - The DMPED, in coordination with the Office of Councilmember Harry Thomas, may form an Advisory Committee comprised of the many stakeholders in the study area, including Advisory Neighborhood Commissions (ANCs), neighborhood and civic organizations, business associations, property owners and investors, and faith-based and non-profit organizations. The Advisory Committee will work closely with the DMPED, Contractor and other government agencies in guiding and developing the plan strategies.

### Task 3.3

- As deemed necessary by the DMPED, the Contractor shall attend public meetings, advisory committee meetings, interagency work group meetings, briefings, and

workshops to present its findings and participate in plan development and implementation discussions. The consultant team will also provide meeting facilitation as needed for meetings.

**Deliverables for Task 3:**

- o Public Outreach Strategy Plan
- o Notes, summaries and photographs of all public engagement events
- o Project webpage and public information documents
- o Presentations at up to five (5) community presentations open to the general public
- o Presentations at up to seven (7) advisory group meetings
- o Presentations at up to two (2) briefings to key government officials throughout the planning process

- a. Delivery of Public Outreach Strategy Plan is due 2 weeks from award of contract.*
- b. Delivery of notes, summaries & other public information documents, as well as photographs of all public engagement events are due throughout the planning process as determined by the DMPED.*
- c. Delivery of project webpage is due 3 weeks from award of contract.*
- d. Contractor will attend meetings, as required by the DMPED, throughout the duration of the planning process.*

**Task 4: Projected Property and Sales Tax Receipts (TIF Analysis)**

**The Contractor shall:**

- o Determine which pad sites have high to low potential for retail reuse or mixed use based on size, accessibility, visibility, linkages to existing commercial activity, proximity to Metro stations and other key criteria. Adjustments should be made for historic properties, properties used by churches and other non-profit organizations for their tax-exempt purposes, and others subject to redevelopment constraints.
- o Project future real property tax assessments for the anticipated development on the corridor, based on the anticipated timing of development, construction costs and historic appreciation rates. Calculate incremental tax revenues above the TIF base assessed value.
- o Project future sales taxes based on the projections of future demand and development. Include a clear assumption as to future retail inflation rates that reflect historical rates. Project future sales tax revenues based on the current tax rates, netting out taxes pledged to support the Convention Center and other outstanding bonds. Calculate incremental tax revenues above the TIF base. The retail sales tax projections will consider both the new and existing retail development.
- o Prepare a TIF report to document the analysis with maps, inventories, charts and tables. Include a brief Executive Summary of the results and recommendations.

**Deliverables for Task 4:**

- o Rhode Island Avenue NE TIF Analysis Report

**TASK 5: IMPLEMENTATION STRATEGY & FINAL REPORT DOCUMENTS**

**The Contractor shall:**

- Task 5.1

- Develop an Implementation Strategy for the plan findings and recommendations, including issue identification, proposed actions, responsible implementation parties, projected timeframe, and projected costs

#### Task 5.2

- Produce a final document containing plan findings and recommendations. The final plan document should include an executive summary, neighborhood assessment, neighborhood revitalization strategies, strategic redevelopment framework plan, and implementation plan.
- Digital files of the final document and of all individual images and text documents should be well organized and provided separately to DMPED. On behalf of the District, the Office of Planning manages spatial information using GIS software from ESRI, and most other data and documents using Microsoft Office 2000 for Windows. We use Quark Express for desktop publishing. Contractors wishing to exchange maps and data effectively with the District should plan to use ESRI ArcMap or equivalent GIS software. The Office of Planning (OP) will provide base mapping and other data in ESRI shapefile or personal geodatabase formats; CAD-format data will be provided only for design-related projects or as specified explicitly in the scope of work. All maps, data, and documents developed for the District must be delivered in acceptable electronic formats. The District prefers maps in ESRI ArcMap format; at minimum, spatial information developed for the District should be delivered in ESRI shapefiles. CAD-based maps are acceptable only for design-related projects or as specified explicitly in the scope of work. Highly generalized (“blob”) maps may be delivered in editable graphic formats, but should be derived from the District’s base map information. Other information and documents should be provided in Microsoft Office 2000, Adobe Photoshop, Adobe Illustrator, or QuarkXPress formats. In all cases, data sets must be delivered with sufficient documentation for the District to be able to assess what they contain and to reuse them in subsequent efforts. Use of data delivered to the District should not be limited by third party license restrictions. Consultants are responsible for printing 5 copies of all required documents and a single copy of all required maps and graphics unless otherwise specified in the scope of work. All software or database development tasks and any use of non-standard graphics or presentation software must be reviewed by the OP Chief Information Officer.

#### ▪ Task 5.3

- Create a set of visually compelling presentation boards and other materials that summarize the plan components and final report. Presentation boards should be at a minimum layout of 20”x30”. Presentation boards and other materials should also be provided in digital format.

#### Deliverables for Task 5:

- Final Land Development Plan, including:
  - Executive Summary
  - Existing Conditions Report
  - Real Estate & Market Analysis
  - Land Use & Zoning Recommendations
  - Redevelopment Framework Plan
  - Implementation Plan

- o Final Presentation boards and other materials
- o 10 bound color copies of Final Land Development Plan
- o Two (2) electronic copies

*Delivery of presentation boards and other materials are due throughout the planning process as required by the DMPED. All other deliverables for Task 5 are due 24 weeks from award of contract.*

**PROJECT SCHEDULE/ PERIOD OF PERFORMANCE**

The DMPED anticipates the timeframe for completion of this project to be 6 months from date of award. Due dates for deliverables have been determined for each task in this Statement of Work. The Contractor and the DMPED will regularly consult on the project schedule and make any necessary adjustments as required throughout the community engagement process.

**EVALUATION CRITERIA**

Selection for contract awards will be based on an evaluation of proposals against the following factors:

The contractor shall respond to the following Evaluation Criteria:

Evaluation Criteria	Points
<b>FACTOR 1</b> <b>Project Approach</b> The approach should describe the tasks, activities and/or methodology that will be used to accomplish the work in a timely manner. The approach should clearly delineate the Offeror’s complete understanding of this effort. Clearly identify milestones and the estimated time needed to complete each task.	25
<b>FACTOR 2</b> <b>Previous Experience</b> Provide at least three (3) past examples and corresponding reference(s) for similar work that contractor has previously completed. <i>These examples should be comprehensive and formatted to communicate the contractor’s experience, understanding and outcome of the completed work.</i>	40
<b>FACTOR 3</b> <b>Contractor Management Team</b> Describe the project principals, project manager and/or key staff. Please address the following: (1) The extent to which the individual’s qualifications and experience relate to this specific project? (2) Which individual will perform each aspect of the work (Resource Allocation)?	20
<b>Price</b>	15
<b>Total Points</b>	100

**CONTRACT TYPE**

This will be a Fixed Price Task Order Contract under ID/IO Contract No. AWC-C-99884-RFLIN-08-01.

**CONTRACTING OFFICER TECHNICAL REPRESENTATIVE (COTR)**

The Contracting Officer Technical Representative (COTR) is responsible for general administration of the contract and advising the Contracting Officer as to the Contractor's compliance or noncompliance with the contract. In addition, the COTR is responsible for the day-to-day monitoring and supervision of the contract, of ensuring that the work conforms to the requirements of this contract and such other responsibilities and authorities as may be specified in the contract.

It is understood and agreed that the COTR shall not have authority to make any changes in the specifications/scope of work or terms and conditions of the contract without written modification executed by the Contracting Officer (CO).

The Contractor may be held fully responsible for any changes not authorized in advance, in writing, by the Contracting Officer, may be denied compensation or other relief for any additional work performed that is not so authorized, and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

The Contracting Officer is the only person authorized to approve changes in any of the requirements of the contract resulting from the solicitation. The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of the contract, unless issued in writing and signed by the Contracting Officer.

In the event the Contractor effects any change at the instruction or request of any person other than the Contracting Officer, the change will be considered to have been made without authority, and no adjustment will be made in the contract price to cover any price increase incurred as a result thereof.

The DMPED COTR for this contract will be:

Derrick Woody, Coordinator – Great Streets Initiative.  
Office of the Deputy Mayor for Planning and Economic Development (DMPED)  
1350 Pennsylvania Avenue, NW  
Suite 317  
Washington, DC 20004  
Telephone: (202) 727-6365

Contracts and/or Task Orders shall be entered into and signed on behalf of DMPED only by the Contracting Officer. The address and contact information of the Contracting Officer for this requirement is:

Office of the Deputy Mayor for Planning and Economic Development (DMPED)  
Jonathan R. Butler, Director of Contracts  
2025 M Street, NW Suite 600  
Washington, DC 20036  
Telephone: (202) 724-8111