

**LEWIS COUNTY, WASHINGTON  
REQUEST FOR QUALIFICATIONS (RFQ)  
2013 COMPREHENSIVE SHORELINE MASTER PROGRAM  
(SMP) UPDATE**

Lewis County is seeking statements of qualifications (SOQ) from individuals or firms who are knowledgeable and experienced in the Washington State Shoreline Management Program and are interested in assisting Lewis County as well as the cities of Centralia, Chehalis, Winlock, and Morton in completing their mandated Shoreline Master Program updates. Lewis County is the lead agency for a coalition consisting of Lewis County and the above cities, which will be cooperating and sharing resources to update each respective jurisdiction's SMP.

Request for qualifications packets may be obtained from Donna Olson, Community Development Office Manager at 2025 NE Kresky Ave., Chehalis, WA 98532, or can be downloaded from the Community Development Department website at:  
[http://www.lewiscountywa.gov/Community Development/Planning](http://www.lewiscountywa.gov/Community%20Development/Planning)

Or, you may request copies by calling (360) 740-1146.

Technical questions regarding this RFQ may be directed to Jerry Basler:  
[Jerry.Basler@lewiscountywa.gov](mailto:Jerry.Basler@lewiscountywa.gov)

Sealed responses will be received at our NE Kresky Ave. office up to the hour of 12:00 p.m., February 16, 2012. Responses delivered later will not be accepted. Lewis County is not responsible for delays in delivery.

All responses to this request that are mailed through the United States Postal Service shall be addressed to the Community Development Office Manager, Lewis County Community Development Department, 2025 NE Kresky Ave., Chehalis, WA 98532. Hand delivered responses, or responses not sent through the USPS, shall be delivered to the Community Development Office Manager located at 2025 NE Kresky Ave., Chehalis, WA 98532.

All SOQs shall be placed in a sealed envelope, which is clearly marked "2013 Shoreline Master Program Update." Responses by fax or email will not be accepted.

Lewis County is committed to providing equal opportunities to State of Washington certified minority, disadvantaged, and women's business enterprises in contracting activities. Lewis County reserves the right to cancel this request or reject any and all SOQs submitted or to waive any minor formalities of this call if in the judgment of the Board of County Commissioners the best interest of the County and the coalition would be served.

No respondent may withdraw their SOQ after the hour set for the opening thereof, unless the award of contract is delayed for a period exceeding 90 days.

/s/ Robert Johnson  
Lewis County Community Development Director

## **INTRODUCTION**

### **Purpose of Request and Background:**

Lewis County and four incorporated cities have formed a shoreline update coalition to update their respective Shoreline Management Programs (SMPs) before the statutory deadline of December 1, 2013. The coalition consists of representatives from Lewis County and the cities of Centralia, Chehalis, Winlock, and Morton.

This coalition has been formed to help streamline the SMP update process and obtain the best value for the limited state grant funds. Although the County and the identified cities have agreed to update their SMPs jointly, the shoreline goals and policies for each jurisdiction may prove to be individualistic and unique to that entity; however within the framework of the state shoreline planning process, the SMP will represent a regional approach to shoreline management. The County and each jurisdiction will conduct its own local adoption process and submit its updated SMP to the Washington State Department of Ecology (ECY) for approval.

This coalition is seeking qualified and experienced consultants to assist in the SMP updates in a manner that is consistent with the procedural and substantive requirements of the Shoreline Management Act (SMA), Chapter 90.58 RCW and related Washington Administrative Codes, including but not limited to the 2003 Shoreline Master Program Guidelines (WAC 173 Chapter 26). The scope of work outlined below will be refined in cooperation with the selected consultant, considering the grant funds available. The final contract must be consistent with the grant agreement between Department of Ecology and Lewis County, which is expected to be finalized in February 2012.

### **SCOPE OF WORK**

Please refer to the Washington State Department of Ecology website for more detail about requirements and deliverables. The project consultant will work with the coalition and ECY staff to provide updated SMPs for Lewis County, Cities of Centralia, Chehalis, Winlock, and Morton. Shoreline Management Act and SMP guidelines provide direction for using existing data and no new data or original research is expected to be generated as part of the update process unless specifically called for in order to meet the requirements of the grant agreement with Ecology. This project will be phased. The consultant team will be hired to provide specific elements in Phases 1-4 and to provide expertise as necessary for Phases 5 and 6. Draft work products will be submitted to the project manager who will submit to ECY for review and comment.

Phase 1. Identify preliminary shoreline jurisdictions; develop public participation program;

Phase 2. Conduct shoreline inventory & analysis and characterization;

Phase 3. Develop draft shoreline environmental designations, policies and regulations; develop Cumulative Impacts Analysis,

- Phase 4. Prepare restoration plan; No Net Loss Report, and revisit Phase 3 products as necessary
- Phase 5. Conduct local approval processes and submit updated SMPs for ECY approval;
- Phase 6. Ecology conducts state approval process.

## **REQUIRED SERVICES AND PRODUCTS**

### **A. Phase 1: Identify Preliminary Shoreline Jurisdictions, Develop Public Participation Plan, including the following tasks:**

1. Preliminary Shoreline Jurisdiction. Update Lewis County's existing shoreline map to incorporate water bodies that exceed the jurisdictional threshold but are not included in the current SMP. Lewis County has taken the initial steps of creating a GIS layer of its shoreline areas, this map will be used as the base map for the update process.
2. Public Participation Plan and Implementation. Develop a public participation plan that is consistent with SMA and SMP guidelines and includes strategies for individual cities and rural Lewis County. The coalition will review the draft plan, provide comments, and approve the final document.
3. Provide related materials and assist in implementing the Plan at the individual jurisdiction and County levels.
4. SMP Checklist. Document how the Phase 1 work products comply with the SMP guidelines by completing the relevant sections of the SMP submittal checklist.

### **B. Phase 2: Shoreline Inventory, Analysis and Characterization**

1. Shoreline Inventory & Characterization of the ecosystem-wide processes. This characterization will include:
  - a. Shoreline Inventory. Prepare a complete digital draft list of the inventory data sources, digital maps of the inventory information and a complete shoreline inventory. Revise as requested by the coalition or ECY.
  - b. The basic geographic context including geology, soils, topography, climate, vegetation and drainage patterns, and fish and wildlife habitats.
  - c. The location and nature of major land uses and trends.
  - d. Identification of ongoing impacts to the shoreline environment that can be addressed through the SMP and what issues are being addressed through other planning and regulatory implementation.

- e. Identification of channel migration zones in appropriate locations, including technical documentation of methods and results.
2. Characterizations of shoreline functions and reach analysis. The shoreline will be separated into reaches based on land use and ecological processes. A detailed analysis will be conducted that includes a narrative with reference to maps at the reach level. This characterization will include:
  - a. Detailed characterization of the physical, biological and land use components within the shoreline jurisdiction.
  - b. Evaluation and assessment of the shoreline ecological function based on current scientific understanding of the relationship between the conditions of the ecosystem-wide processes and conditions within the shoreline jurisdiction.
  - c. The location and nature of known pertinent regulatory activities (e.g. TMDL, ESA listings, and contaminated sites).
3. Identification of potential protection and restoration areas. Opportunities will be identified for protection/restoration of upland and adjacent areas essential for maintaining the shorelines ecological form and function.
4. Analyze shoreline use and public access. The methodology and specifications/parameters will be agreed to by the coalition, ECY and the consultant team prior to the analysis. Particular attention should be given to the significant pressure placed on public access locations by seasonal tourism. The consultant will prepare:
  - a. An analysis of current public use sites and sites that provide an opportunity for additional future public access.
  - b. An analysis of current and projected shoreline use patterns and potential use conflicts.
  - c. Estimates of future demand for shoreline space consistent with WAC 173-26-201(3)(d)(ii) requirements.
  - d. An analysis of opportunities for appropriate shoreline (SMA preferred) uses and potential conflicts, based on current use patterns and projected trends.
5. Summarize characterization and analysis findings and make recommendations. This will include a report and map portfolio that summarizes the assembled information and data as it relates to the development of an effective SMP. The report will present findings and recommendations, and will include the stand alone subtask work products as appendices. The consultant will provide 10 copies of the draft report for review by the coalition for their review and comment prior to finalization of the document.
6. SMP Checklist. Document how the Phase 2 work products comply with the SMP Guidelines by completing the relevant sections of the SMP submittal checklist.

**C. Phase 3: Develop Draft Shoreline Environmental Designation, Develop Cumulative Impacts Analysis, Policies and Regulations.**

This Phase of the SMP Update will be done jointly as much as possible, but will require separate Cumulative Impacts Analysis for each of the jurisdictions in the coalition.

To the extent possible, the coalition will jointly develop shoreline policies, regulations, and standards and shoreline environment designations with environment-specific policies, regulations, and standards. The consultant and coalition may utilize a technical advisory or citizen advisory group to assist in incorporating the public vision in the development of these shoreline policies, regulations, and standards. Acknowledging that local variations in policies, regulations, and standards is likely, it is the intent of the coalition that the SMPs maintain the greatest degree of consistency possible.

1. Conduct a community visioning process for countywide, UGAs and individual cities that are based on SMA policy and inventory/characterizations. A community visioning process will be conducted countywide and for each coalition jurisdiction including the urban growth areas to determine what citizen goals and aspirations are in the context of the preliminary findings of the shoreline inventory and characterization. A memo summarizing the results of the visioning process will be prepared and submitted to the coalition.
2. Develop countywide shoreline goals. Countywide shoreline goals applicable to all coalition jurisdictions will be developed to comply with the SMA and SMP Guidelines, and reflect the public visioning process.
3. Develop shoreline environment designations that comply with the SMP Guidelines and reflect the findings of the shoreline inventory and characterization and the public visioning process where applicable.
4. Develop specific use policies, regulations and standards for the different environments designations as appropriate which comply with SMA and the SMP Guidelines and reflect the public visioning process. The draft environment designation specific use policies and regulations will identify:
  - a. Shoreline use policies and regulations that implement the goals developed in task 2.
  - b. Which shoreline uses are prohibited and which are allowed by substantial development permit or conditional use permit.
  - c. Bulk dimensional standards (buffers, setback, density, etc.).
  - d. Any local policies or regulations adopted by reference, if relied upon to satisfy SMA or SMP Guidelines requirements.
5. Develop Shoreline modification activity policies, regulations and standards. Shoreline modification activity policies, regulations, and standards will be developed to comply with SMA and the SMP Guidelines, and reflect the public

visioning process. The draft shoreline modification activity policies and regulations will identify:

- a. Shoreline modification activity policies and regulations that implement the goals.
  - b. Which shoreline modification activities are prohibited and which are allowed by shoreline substantial development permit or conditional use permit.
  - c. Bulk dimensional standards (buffers, setbacks, density, etc.).
  - d. Shoreline modification activity standards.
  - e. Any local policies or regulations adopted by reference, if relied upon to satisfy SMA or SMP Guidelines requirements.
6. Conduct Case Studies. Case studies will be used as appropriate to evaluate and communicate to the public the effects of proposed goals, policies, regulations and standards. The case studies should focus on the topics or issues the community is most concerned about (i.e. docks, shoreline stabilization, buffers, etc.) as demonstrated through the visioning process.
  7. Develop SMP administrative provisions. Draft provisions for SMP administration, including necessary elements for permit administration, compliance, and enforcement. Generic provisions will be adapted to fit the permitting procedures of each jurisdiction. This may also require amendments to existing Critical Areas Ordinances for consistency with the draft SMP policies
  8. SMP Checklist. Document how the Phase 3 work products comply with the SMP Guidelines by completing the relevant sections of the SMP submittal checklist.

**D. Phase 4 Prepare Restoration Plan; No Net Loss Report, and revisit Phase 3 products as necessary**

Products as Necessary. This Phase of the SMP Update will be done jointly as much as possible, but will require separate Cumulative Impacts Analysis and Restoration Plan for each of the jurisdictions in the coalition.

1. Prepare preliminary cumulative impacts analysis. The consultant will analyze the cumulative impacts of existing SMPs to identify deficiencies and opportunities within them.
2. Cumulative impacts analysis. The consultant will analyze the cumulative impacts of future uses and the development allowed by the proposed SMP.
3. Restoration Planning. The findings from the completed analyses will be used by the consultant to develop a restoration plan. The plan will establish overall goals, objectives, and priorities in each shoreline area for the restoration of ecological functions. Current and ongoing programs that contribute to achieving these goals, as well as additional projects necessary for a successful

restoration plan will be identified. The restoration plan should include an implementation strategy, including funding, timelines, and benchmarks for monitoring success. Identification of specific prioritized restoration projects should be included as an appendix to the SMP.

4. SMP Checklist. Document how the Phase 4 work products comply with the SMP Guidelines by completing the relevant sections of the SMP submittal checklist.

**E. Phase 5 Conduct Local Approval Process and Submit Updated SMPs for Ecology approval.**

Each jurisdiction will conduct its own local approval process and submit its adopted SMP to Ecology for approval. The Consultant will attend public workshops and hearings to provide necessary expertise, particularly with respect to the scientific aspects of the project and maintaining consistency among the individual jurisdictions' SMPs.

**F. Phase 6 Ecology Conducts State Approval Process.**

The consultant will be available to assist staff in responding to comments that may be generated through Ecology's approval process and maintaining consistency among the individual jurisdictions' SMPs.

**Approximate Timeline** (subject to DOE contract and subject to change):

RFQ Issued:	January 25, 2012
SOQs Due by:	12:00 pm: February 16, 2012
BOCC Contract Award:	February 2012
Final Contract Signed:	February 2012
Work to Commence:	Upon Contract Acceptance
Work Completed:	August 1, 2013
Adoption Completed:	December 1, 2013

## **STATEMENT OF QUALIFICATIONS SUBMITTAL FORMAT**

The General Information form, beginning on page 10, is designed to serve as the cover sheet. Do not attach cover letters, title pages, or blank sheets ahead of this form, nor substitute letterhead paper for it. If additional space is needed, plain paper may be attached behind this form. This form must be signed by a person authorized to make proposals and enter into contract negotiations on behalf of your agency. This individual must be at least 18 years of age.

Failure to submit this form will result in your SOQ being deemed non-responsive.

### **Statement of Qualifications Format**

The statement of qualifications (SOQ) shall address the following requirements in the order given:

1. Understanding of and approach to the project, including GMA/SMA integration.
2. Knowledge of local shoreline conditions and the needs of the individual jurisdictions.
3. Qualifications and experience:
  - a. With SMA and the 2003 SMP Guidelines. Include specific information on previously completed technical products, or completed SMPs if available. Candidates should also highlight experience in implementing an SMP or development regulations at the local level.
  - b. With GMA critical areas and 'best available science' requirements.
  - c. Technical skills, including but not limited to GIS data collection and mapping, riparian ecology, wetland ecology, geomorphology, planning, ordinance development, and project management, public facilitation and outreach. This should include staffing information, in-house or sub-consultants, about specific personnel that have the ability to execute each task.
  - d. Ability to compile and analyze data from a variety of sources, standardizing as needed.
  - e. Working with a diverse group of stakeholders and the public on controversial issues.
  - f. Working with the Department of Ecology staff and reporting requirements.
  - g. Maintaining work product records and metadata per the Ecology submittal requirements.
4. Proposed Scope of Work and schedule for completion of all work – based on the scope outlined above. Applicants are encouraged to modify the scope as needed to maximize efficiency and results.
5. Consultant team members and management structure (C. iii, above)
6. Respondent's expectations of the coalition.
7. References.
8. Proposed cost per task and in total for completing the scope of work.

The statement of qualifications shall be contained in a document not to exceed 40 pages, including pictures, charts, graphs, tables, and text. The required cover form, front and back covers, and blank section/numerical dividers, will not be counted in this page limit. Page size is limited to 8 ½ x 11 inches, with basic text information no smaller than 11-point type.

To assist in the evaluation, the statement of qualifications shall be formatted using the headings listed above. Please be clear and concise in responding to this request for qualifications – shorter is better. Emphasis should be placed on the specific education, experience and qualifications of the people who will actually perform the work of this contract and the specific approach to the execution of the work.

# RFP # 11-01: Shoreline Master Program Update

## General Information

**This form must be signed by a person authorized to make proposals and enter into contract negotiations on behalf of your agency. To be considered for this project, the submittals must be completed in accordance with this RFQ and this cover sheet must be attached. Failure to submit this form will result in your SOQ being deemed non-responsive.**

\_\_\_\_\_  
Authorized Official (signature)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Authorized Official

\_\_\_\_\_  
Title of Authorized Official

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Contact Person

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Fax Number

\_\_\_\_\_  
E-Mail Address

\_\_\_\_\_  
Federal Tax ID Number

The following Addenda is/are hereby acknowledged:

Addendum No.	Date	Signed Acknowledgement
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1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Note: Failure to acknowledge receipt of Addenda will render the statement of qualifications non-specific and therefore void. If no addenda, please mark "none".**

## **SUBMITTAL PROCEDURE**

Please submit one (1) original and ten (10) copies of the SOQ for services in an 8-1/2” x 11” bound format. Also, please submit one electronic copy of the statement of qualifications on a CD.

Sealed responses SHALL be received by the Community Development Office Manager NO LATER THAN 12:00 p.m., February 16, 2012.

Responses delivered later will not be accepted. Neither Lewis County nor the coalition is responsible for delays in delivery. All responses shall be placed in a sealed envelope, which is clearly marked “2013 SHORELINE MASTER PROGRAM UPDATE.” ***Telephone, facsimile, or electronically transmitted SOQs will not be accepted.***

All responses to this request shall be addressed to the attention of Donna Olson, Office Manager:

**Delivery Address:**

*(Hand delivery and non-USPS)*  
Community Development Office Manager  
Lewis County Community Development  
2025 NE Kresky Ave  
Chehalis, WA 98532

**Mailing Address:**

*(USPS)*  
Community Development Office Manager  
Lewis County Community Development  
2025 NE Kresky Ave  
Chehalis, WA 98532

The respondent must sign, where indicated on the General Information page, acknowledgement of any addenda prior to the bid opening. Failure to comply with this provision will render the bid non-responsive and therefore void.

It is the sole responsibility of the respondent to learn of addenda, if any. Such information may be obtained from the Lewis County Planning Department’s website, <http://www.lewiscountywa.gov/CommunityDevelopment/Planning/>, or by calling (360) 740-1146, (Jerry Basler). However, the sole responsibility for obtaining and learning of Addendum belongs to the respondent. Lewis County accepts no responsibility or liability and will provide no accommodation to respondents who fail to check for addenda and submit inadequate or incorrect responses.

## **EVALUATION CRITERIA**

Each statement of qualifications received in response to the RFQ will be objectively evaluated by the coalition based on:

- Understanding and approach to the project, concluding GMA/SMA integration.
- Knowledge of local shoreline conditions and the needs of the individual jurisdictions.
- Documented experience developing Shoreline Master Program updates that follow the Washington State Shoreline Management Act and the 2003 Shoreline Management Program Guidelines.
- Experience with GMA planning, critical areas and 'best available science' requirements.
- Geographic Information Systems expertise.
- Technical expertise and approach to data collection, management, and analysis.
- Experience working with a wide range of federal, state, and local agencies, special interest groups, tribes and the general public, and proposed approach to public outreach.
- Experience working with a diverse group of stakeholders and the public on controversial issues.
- Working with the Washington State Department of Ecology.
- References
- The consultant team's experience working together.
- Value as demonstrated by the scope of services and price.

## **INFORMATION**

Questions regarding this request for qualifications may be directed to Jerry Basler at (360) 740-1389 or [Jerry.Basler@lewiscountywa.gov](mailto:Jerry.Basler@lewiscountywa.gov).

## **BUDGET**

The Washington State Legislature in conjunction with the Department of Ecology has allocated certain funds to cover the cost of this comprehensive SMP update.

## **REIMBURSEMENT**

Neither Lewis County nor the coalition will reimburse respondents for any costs involved in the preparation and submission of responses to this RFQ or in the preparation for and attendance at subsequent interviews. Furthermore, this RFQ does not obligate the coalition to accept or contract for any expressed or implied services. The County and the coalition reserve the right to request any respondent to clarify their SOQ or to supply any additional material deemed necessary to assist in the evaluation of the respondent, individual or firm.