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## AGENDA COVER MEMORANDUM

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AGENDA DATE: February 16, 2005

TO: LANE COUNTY BOARD OF COMMISSIONERS

FROM: Economic Development Standing Committee, Bill Dwyer, Chair

PRESENTED BY: Peter Thurston, Community and Economic Development Coordinator

AGENDA ITEM: ORDER/IN THE MATTER OF AWARDING CONTRACTS FOR STRATEGIC INVESTMENT PROJECTS SELECTED THROUGH THE 2004 ECONOMIC DEVELOPMENT RFP OPEN PROPOSAL CYCLE

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### I. MOTION

IT IS MOVED THAT THE ORDER BE ADOPTED IN THE MATTER OF AWARDING CONTRACTS FOR STRATEGIC INVESTMENT PROJECTS SELECTED THROUGH THE 2004 ECONOMIC DEVELOPMENT RFP OPEN PROPOSAL CYCLE

### II. ISSUE OR PROBLEM

Shall Lane County contract for economic development services that were rated, ranked, and recommended by the Economic Development Standing Committee (EDSC)? Specifically, shall \$180,000 be committed from FY04-05 economic development strategic investment funds to: B.R.I.N.G. Recycling, Planet Improvement Center (\$100,000) and the Lane County Land Management E-permits project (\$80,000)?

### III. DISCUSSION

#### A. Background.

In July 2004 the Economic Development Standing Committee to the Board of Commissioners released a request for proposals (RFP) to implement the Economic Development Strategic Investment Program, described in Lane Manual Chapter 4.110(2). Attachment A includes the specific selection criteria, process and RFP/Open Proposal Cycle schedule. Attachments B and C are applications for the projects recommended for award by the Economic Development Standing Committee: B.R.I.N.G. Recycling, Planet Improvement Center and the Lane County Land Management E-permits project, respectively. The final score sheet for proposals (Attachment D), the full RFP, LOI publication notice, and the four (4) applications received in the Open Proposal Cycle are available from the Board Secretary.

The Request for Proposal (RFP) provides for an Open Proposal Cycle that allowed applications to be received after the Initial Proposal Cycle. In this process the closing date was January 3, 2005. Four proposals were received in the Open Proposal Cycle and the subsequent LOI publication period, including: 1) B.R.I.N.G. Recycling, Planet Improvement Center, 2) Lane County Land Management E-permits, 3) JH Baxter air quality sampling, and 4) Chabin business development.

The Open Proposal Cycle process described in the RFP (please see attachment A) calls for a Letter of Interest (LOI) to be published before a project is recommended for funding. Based on review of the Land Management E-permits project proposal in December 2004, the EDSC found that the this proposal was eligible for funding consideration, and a request for letters of interest was published on December 16, 2004, with the due date of January 3, 2005. On January 27, 2005 the EDSC reviewed, rated and ranked the four (4) proposals that were received, and recommends two project for funding.

#### B. Analysis

The EDSC followed a deliberate process rating and ranking proposals against the criteria described in the request for proposals (RFP), in accordance with the Open Proposal Cycle and Letter of Interest processes. The point scores arrived at by averaging project raters' scores is: 101.4 points for the BRING Recycling proposal, 100.8 points for the Land Management E-permits project, 58.4 points for the Chabin business development services project, and 67.8 points for the LRAPA air sampling project. The threshold described in the RFP Open Proposal Cycle for recommending projects is 80 percent (96 points).

The EDSC took the following steps to rate and rank each project: 1) all five committee members rated the proposals using the point structure described in Part 12 of the RFP. The total points available are 120, and the number of points in each category are shown in Attachment A. The BRING proposal was for \$150,000 and the EDSC recommends an award of \$100,000 due the need to maintain strategic contingency and reserve funds in FY 05-06. The points were added and averaged for the final score for each project (Attachment D). EDSC recommends that special conditions for all grants include recognition of contributions by "Lane County government" in the promotional materials and public information of all contractors.

The total strategic reserve and project budget in FY 04-05 is \$634,535. All project commitments awarded this fiscal year to date equal \$299,350, including: \$106,100 for three projects in the RFP Initial Proposal Cycle, \$150,000 from reserve for the Molecular Probes project, and past contract obligations of \$43,250. The balance in the strategic investment part of the budget for this fiscal year, with all commitments accounted for to date, is: \$344,185. Assuming \$180,000 awarded in this Open Proposal Cycle, the balance in the strategic investment fund at end of fiscal year 04-05 will be \$164,185.

#### **IV. IMPLEMENTATION/FOLLOW-UP**

Upon approval of the Board, contracts and outcome reporting requirements will be prepared and budget authority established through the supplemental budget process, in substantial conformance with the proposals submitted, and after County Counsel review.

#### **ATTACHMENTS**

##### **ORDER**

- A – Request for Proposals process and schedule description**
- B – Project application – BRING Recycling proposal**
- C – Project Application – Land Management E-permits proposal**
- D – Final proposal rating and ranking sheet**

Note: The board secretary has copies of all proposals, as submitted, and the RFP/LOI documents.

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IN THE BOARD OF COUNTY COMMISSIONERS, LANE COUNTY, OREGON

**ORDER NO.**

- ) IN THE MATTER OF AWARDING CONTRACTS FOR
- ) STRATEGIC INVESTMENT PROJECTS SELECTED
- ) THROUGH THE 2004 ECONOMIC DEVELOPMENT
- ) RFP OPEN PROPOSAL CYCLE

WHEREAS, by Order 02-1-2-1, Lane County Board of Commissioners established a policy for distributing video lottery economic development funds that is adopted in Lane Manual Chapter 4, and

WHEREAS, a request for proposals (RFP) for the Economic Development Strategic Investment Program was released in July 2004, and

WHEREAS, the Economic Development Standing Committee has completed rating and ranking proposals received in the 2004 Open Proposal Cycle described in the RFP, and

WHEREAS, sufficient video lottery economic development funds are available in the FY 04-05 Strategic Investment Projects category and Operational Reserve, and

WHEREAS, the Lane County Board of Commissioners has reviewed the ranked list of projects and determined that it is in the public interest to fund the recommended projects, NOW, THEREFORE,, IT IS HEREBY ORDERED that the following Lane County Strategic Investment Projects are awarded in the amounts indicated:

- a) B.R.I.N.G. Recycling, Planet Improvement Center project, in the amount of \$100,000, in substantial conformance with the proposal on a proportional basis to the original application amount, and including recognition of contributions by "Lane County government" in promotional materials and public information that relates to this project.
- b) Lane County Land Management E-Permits project, in the amount of \$80,000, in conformance with the competitive application outputs and outcomes.

FURTHER ORDERED that funds for these projects shall come first from the video lottery strategic investment projects line in the FY04-05 budget; with the balance from the video lottery economic development operational reserve. County administration staff is directed to implement the transfer of funds from the opportunity reserve to spending authority for the project(s) approved by this Order, in the next supplemental budget.

FURTHER ORDERED that the County Administrator is authorized to sign the contracts authorized under this Order.

Signed this 16th day of February, 2004.

\_\_\_\_\_  
Anna Morrison., Chair  
LANE COUNTY BOARD OF COMMISSIONERS

APPROVED AS TO FORM  
Date 2/9/05 Lane  
County

\_\_\_\_\_  
Jesse [Signature]  
OFFICE OF LEGAL COUNSEL

## RFP Open Proposal Cycle/LOI Descriptions and Schedule

### **Proposal evaluation and award process**

Initial Proposal Cycle. Each proposal will be reviewed by the Economic Development Standing Committee to the Board of County Commissioners. Proposals will be preliminarily scored based on the criteria detailed in Parts 11 and 12. Proposals will be initially rated and ranked against other proposals submitted in the same category. Individual committee members' scores will be totaled and then averaged for each rating criterion. Proposals receiving at least eighty (80) percent of the total points available (80% = 96 points) will be considered for final rating and ranking by the committee. An eighty (80) percent or higher score does not assure a project will be recommended or funded. Rating and ranking of proposals will be completed by the Economic Development Standing Committee, comprised of: Commissioner Don Hampton, Commissioner Bill Dwyer, County Assessor, Jim Gangle, Chuck Forster, Lane Workforce Partnership Executive Director, and Janice Mackey, citizen appointee. The initial proposal cycle under this RFP is complete when the selection committee sends notice of recommended award(s) to all applicants who submitted a proposal by the initial proposal cycle deadline.

Open Proposal Cycle. In accordance with Part 5 of this RFP, any eligible applicant may apply in the Open Proposal Cycle, and participation in the Initial Proposal Cycle is not a prerequisite. Consideration, rating and ranking of Open Proposal Cycle projects will begin after the Initial Proposal Cycle is complete, as shown in Part 9. After the Initial Proposal Cycle is complete, the EDSC (on its own or at the request of an unsuccessful proposer from the Initial Proposal Cycle under this RFP) may reconsider, clarify, request and collect additional information about projects, negotiate with applicants and re-rate and re-rank proposals. However, in reconsidering a prior proposal, the committee would likely expect to see some substantial change in order to warrant reconsideration. The reconsideration may result in a lower rating and ranking depending on changes. Upon receipt of a proposal, or reconsideration of previously proposed project, it will be rated and ranked using the selection criteria and Open Proposal Cycle evaluation process described in the RFP. An open proposal cycle application must receive eighty percent (80%), or more, which equals 96 points or more, to be eligible for consideration of an award, and assuming availability of funds. Upon receipt of a proposal determined to be eligible for consideration, Lane County may then place an ad in a newspaper of general circulation soliciting letters of interest for any other projects. Letters of interest (LOI) will be received from potential applicants for a period of two weeks from the publication of the notice. If a LOI is received in the designated period, all interested parties will be sent notice that two additional weeks from the date of the letter will be allowed to submit their complete proposal(s) under the open proposal cycle guidelines. The same process as in the initial proposal cycle for rating, ranking and recommending awards will be followed for the open proposal cycle.

In order to complete the final ranking in the initial proposal and open proposal cycles, the committee may call applicants for interviews to clarify the written proposals, seek additional written information or ask follow up questions. Information derived from this additional

inquiry will be used in the final rating and ranking of proposals. The committee will use its good faith judgment and discretion based on the criteria described in this RFP. The Board of County Commissioners will then receive recommendations from the Economic Development Standing Committee, in accordance with the schedule in Part 9, above. The committee will specify an allocation for each project that is recommended for award. Applicants may not receive all funds requested. EDSC may choose not to recommend any awards in the Initial Proposal Cycle process.

All awards will be made to those proposals that best meet the requirements set forth in this RFP and that are in the best interest of Lane County. Lane County reserves the right to waive minor irregularities and may reject any proposal not in compliance with all prescribed public bidding procedures and requirements, and may reject for good cause any or all proposals upon a finding that it is in the public interest to do so. Lane County also reserves the right to negotiate the scope of work based on any additional clarification or follow up responses and on the proposed budget as it is affected by negotiating the scope of work. If a proposal is submitted for professional services, the contract form (Attachment E) may be modified to appropriately reflect the applicant's labor standards requirements. Modifications of Oregon contracting statutes that become effective March 1, 2005 may apply to awards under this RFP process.

#### **Evaluation criteria**

- 1) Addresses Lane County Strategic Plan economic development goals and Oregon economy benchmark(s) (20 points) – Measures the degree to which the project will improve Lane County's net job growth, per capita income, wages, and employment factors.
- 2) Increases work readiness (15 points) – Measures the degree to which the capacities of workers will be enhanced and improved to work in the changing economy.
- 3) Readiness to proceed (25 points) – Will the project begin immediately upon funding award.
- 4) Opportunities for future development (15 points) – Evaluates the degree to which the results of the program will promote future development of industrial, commercial, and residential facilities, expands global economic opportunities, produces local products, increases the tax base and reduces future responsibilities of government.
- 5) Leverage of other funds (15 points) – Measures the commitment of other agencies and organizations to work toward the project goals by the degree to which they are willing to commit funds and other resources to the project.
- 6) Partnerships (10 points) – Evaluates how many public or private sector organizations are working in partnership to develop new and innovative ways of accomplishing economic development goals, and the relevance of the proposal to a strategic plan or regional economic development goal to create or retain jobs.
- 7) Budget presentation (10 points) – The budget, and budget narrative, thoroughly discuss the project costs and the budget is reasonable and consistent with the proposal as a whole.
- 8) Audit and accounting adequacy (10 points) – Measures the extent to which the applicant accounts for project funds separately from other programs, minimizes overhead costs, and provides a clear method of reporting project expenses and related results.

## **Economic Development Letter of Interest Publication (December 16, 2004)**

### **Open Proposal Cycle Letters of Interest**

The Lane County Administration Department, Community and Economic Development Program is seeking Letters of Interest (LOI) to provide economic development services in accordance with the open proposal cycle guidelines in the 2004-05 Economic Development Request for Proposals (RFP). There is \$93,900 in funding for projects that will be delivered in a contract period from approximately March 1, 2005 for a period of one year, with the possibility of being extended for up to two additional years based on demonstrated need, availability of funding, and contractor performance. Applicants must be licensed to perform the work proposed in the applicant's proposal. In the event a proposal includes public improvements as defined in Oregon Revised Statutes Chapter 279.011, Subsection 8, the applicant must comply with all applicable provisions of Chapter 279.

A LOI must be received by 1 p.m. on January 3, 2005 at: Lane County Administration Department, 125 E. 8<sup>th</sup> Avenue, Eugene, Oregon, Attention: Peter Thurston, Community and Economic Development Coordinator. This Open Proposal Cycle LOI advertisement was published upon receipt of a proposal for funding of an interactive voice response permitting system by Lane County Land Management Division. This proposal is eligible for funding consideration, in accordance with the open proposal cycle evaluation process described in the RFP, and may be recommended to the Board of County Commissioners for award. If a LOI is received in the designated period, all interested parties will be sent notice that two additional weeks from the date of the letter will be allowed to submit their complete proposal(s) under the open proposal cycle guidelines, described in the RFP. Properly submitted proposals will be rated and ranked in accordance with the RFP before a project award is considered by the Board of County Commissioners. This notice extends the RFP open proposal cycle deadline from 12/31/04 to January 3, 2005 at 1 p.m.

Respondent must be an equal opportunity employer. A Request for Proposals (RFP) document is available at the address above. Lane County may reject any proposal not in compliance with all prescribed public selection procedures and requirements, and may reject for good cause, any and all proposals upon a finding that it is in the public interest to do so. For further information call (541) 682-4203.

### **2003 RFP Schedule**

Issue Request for Proposals	6/30/04
Initial Proposal Cycle Pre-Proposal Conference, 2 p.m.	7/16/04
Initial Proposal Cycle Deadline, 2 p.m.	8/6/04
Initial Proposal Cycle rating, ranking	8/26/04
Letter of Interest (LOI) requested, as needed	8/26-12/31 '04
Announce Contractor Awards from Initial Proposal Cycle -- Estimated date Open Proposal Cycle may begin	9/15/04
Negotiate and Finalize Contracts	11/30/04
Open Proposal Deadline, 2 p.m.	12/31/04

JAN 13 2005



Peter Thurston, Community & Economic Development Coordinator  
Lane County Administration Department  
125 E. 8<sup>th</sup> Avenue  
Eugene, OR 97401

January 11, 2005

Dear Mr. Thurston,

Please attach this letter to the proposal BRING Recycling submitted to your office on January 3<sup>rd</sup> 2005 in response to the Lane County 2004-05 Economic Development Request For Proposal, open cycle.

BRING is requesting funding to help build The Planet Improvement Center, located in Glenwood, Oregon. Lane County Economic Development funds would be used primarily to purchase materials for capital improvements necessary for BRING to occupy and do business on the site. Some funding may be used to pay contractors to construct buildings or other site improvements. BRING will comply with all applicable provisions of Oregon Revised Statutes Chapter 279.011. Occupation of the site is critical to BRING's ability to reach more people, increase services, divert more waste materials and hire additional staff. BRING will continue to develop and improve the site once the basic infrastructure is in place.

BRING is a 501(c)(3) not-for-profit corporation and an equal opportunity employer.

Sincerely,

Julie Daniel  
Director



**Lane County Economic Development Project**

**Section 1**

**Proposal Cover Page**

Grant Amount Requested: \$150,000 Match Amount Proposed: \$1,691,000

Please select the appropriate box for this application: ☐ 2004-05 Initial Proposal Cycle ☒ **2004-05 Open Proposal Cycle** Eighty percent (80%) of points is the minimum required to qualify for funding consideration.

Project Focus (Required - select one category of economic development): ☒ Business development, ☐ Workforce development

**PROJECT TITLE:** The Planet Improvement Center

Principal Project Organization: BRING Recycling

Address PO Box 885, Eugene, OR 97440-0885

86641 Franklin Blvd., Eugene, OR 97405

Project Contact Person: Julie Daniel, Executive Director

Phone: 746-3023 Fax: 726-9894

E-mail: julied@bringrecycling.org

Person/Agency preparing fiscal reports Judy Bryant (audited by Kirkpatrick & Henderson, CPA)

Title: Office Manager

Address PO Box 885, Eugene, OR 97440-0885

86641 Franklin Blvd., Eugene, OR 97405

Phone: 746-3023 Fax: 726-9894

E-mail: judyb@bringrecycling.org

Our representative, Julie Daniel, attended the pre-proposal conference on behalf of this project.

Signature of Applicant and each Partner included in Proposal (Copy and Use additional sheets as needed)

Signature   
Julie Daniel, Executive Director

Typed name/Title

1/3/05  
Date

BRING Recycling

Applicant Organization

Signature

Date

Typed name/Title

Partner Organization

Signature

Date

Typed name/Title

Partner Organization

Add additional signature lines as needed.

## **SECTION 2 – PROJECT SUMMARY**

The Planet Improvement Center is a new 3-acre facility located in Glenwood that will serve as BRING Recycling's new headquarters, expanding our popular used building materials outlet into a regional learning center and "theme park" of reuse, conservation and sustainability. LCED funds will fill a crucial \$150,000 gap in our funding, allowing us to begin building in spring of 2005 and move our operations onto the new site by spring of 2006.

The project meets Lane County Strategic Plan Goal 1 — to work for a strong regional economy to expand family-wage jobs — by creating new jobs at BRING and retaining jobs in the recycling/ reuse industry that will be lost due to industry changes, replacing them with higher skilled, higher-paid jobs in deconstruction and construction. The project meets Goal 5 — to contribute to appropriate community development in the areas of housing and land development — by redeveloping a distressed commercial property inside the urban growth boundary, in an enterprise zone, and in an area slated for urban renewal. By supplying low-cost building materials, it contributes to keeping housing stock affordable and in good repair.

This project, working in the recycling/waste management and construction industries, will serve Lane County primarily, with plans to serve the entire state and region. Currently, 71% of our reuse customers and 53% of the children we educate are of low-to-moderate income. We will expand our services to include the wider population, including home owners, builders, landlords and business owners. We currently serve 50,000 people (35,000/ reuse; 15,000/ education). We will increase that number by 30% within three years to 65,000.

The project focus is Business Development, with workforce development as a secondary component. It creates new opportunities for growth in the recycling, reuse and deconstruction sectors; expands BRING's enterprises in reuse, deconstruction and education; creates and retains jobs, directly and indirectly; trains low-skilled workers in higher-skilled, higher-paying jobs; and supports cottage industries, start-ups and other small businesses with affordable materials.

We plan to begin building Phase 1 in spring of 2005, and to begin operating from the new site by spring of 2006. We will complete Phase 2 in 2006. Once operating at the new site, we will add 6.5 FTE to BRING's payroll within 3 years; and increase the number of people we serve, the amount of materials salvaged and resold, and the number of out-of-area visitors by 30% in 3 years. We will create 30 jobs indirectly.

BRING does not have project partners, per se. However, we are working closely with the following vendors, all of whom are committed to the project's success: TBG Architects & Planners, Inc.; Vik Construction; Good Company; Kate McGee, Landscape Architect; Balzhiser & Hubbard Engineers; and Rexus.

Per capita waste generation in Lane County and Oregon continues to climb, outpacing efforts to reclaim materials from the waste stream. This project helps Lane Co. meet tough state-mandated waste recovery goals (ORS 459) while creating jobs and expanding economic opportunity. Lane County ranked the Planet Improvement Center #2 (of 31) on the "2004 Needs & Issues Inventory for Community Facilities Projects." This year, Lane County Board of Commissioners added "reuse and recycling facilities" as a priority for economic development funding.

## **SECTION 3 – PROJECT NARRATIVE**

### **1. Project Focus and Scope – Business Development**

The Planet Improvement Center is a new 3-acre facility, centrally located in Glenwood, near I-5 and Highway 126. The new facility will provide significant improvements over BRING's current cramped and flood-prone site, making it more appealing and accessible to the general public and increasing our capacity to provide service. Improvements include: an expanded, all-weather, shopper-friendly retail area; a reception & education building; covered drop-off and loading areas; paved parking; demonstration gardens; outdoor art; educational exhibits and resources; bioswales for on-site storm water management; a living "green roof;" and a wide selection of used building materials, including value-added products. The Center will incorporate used materials, green building techniques and interpretive displays throughout to demonstrate practical examples of sustainable development. We envision a regional education center that will attract customers, eco-tourists, civic and business leaders, students and others from around the region and will spawn similar projects in other communities.

The Planet Improvement Center meets Lane County Strategic Plan Goal 1 — to work for a strong regional economy to expand family-wage jobs — by serving as a catalyst for growth in the recycling, reuse, deconstruction and sustainable development industries and by contributing to higher-paid, higher-skilled jobs.

First of all, the new Center will allow BRING to significantly expand our reuse, deconstruction and education enterprises. We anticipate serving at least 30% more people and increasing our reuse and deconstruction revenues by 30% within three years of opening the Center, as a result of greater exposure, convenient access, an improved shopping experience, and expanded outreach and education programs. Our already flourishing deconstruction business will expand even more when we have adequate space to store and display high-quality salvaged materials. This enterprise provides the construction industry with an environmentally sound alternative to dumping useable materials in the landfill. It supports builders, landlords, remodelers, realtors, cottage industries, artists, crafts persons, repair shops and other micro-enterprises by supplying them with affordable materials. Expanded outreach, education programs and displays will increase participation in reuse and deconstruction. Students of all ages will participate in internships and hands-on learning experiences. Children in K-12 will enjoy on-site tours and workshops that complement our existing in-the-schools programs. An expanded reuse outlet will help keep housing affordable and housing stock in good repair by teaching practical skills and providing low-cost materials. Ordinary citizens will have something fun to do on the weekend—gathering materials and gaining ideas for home repair, gardening, hobbies or artistic projects.

Second, the Center will create new, higher-paying jobs at BRING; help retain jobs in the recycling/ reuse industry; and train workers in higher-skilled jobs. Co-mingling, mechanized sorting and other changes in the recycling industry have resulted in a loss of jobs in this sector and in Lane County. Most co-mingled recycling collected by commercial garbage haulers is now trucked to Portland for sorting and processing. BRING once funded its mission predominantly by the sale of recycling commodities collected at the Glenwood Receiving Station. With the advent of co-mingling, that income stream is dwindling, and fewer workers are needed to sort and process materials. That's the bad news.

The good news is that jobs lost in the recycling sector can be replaced by higher-skilled and higher-paying jobs in reuse and deconstruction. The Planet Improvement Center will allow BRING not only to retain jobs that would be lost, but to add new jobs and retrain people in better paying jobs. BRING employees 16.5 FTE (2003-04) and expects to add 6.5 FTE in permanent, new jobs over the first 3 years after moving onto the new site — 3FTE in deconstruction, 2.5 FTE in reuse, .5 FTE in education, and .5 FTE in development. Recycling jobs average \$9/hour. New jobs in reuse and deconstruction will average \$10/hour and \$11.50/hour, respectively.

BRING is committed to raising wages and providing compensation packages that support families. In 2003-04, the total payroll expense, including wages, payroll expenses and health benefits was \$490,053, or an average of \$29,700/employee (16.5 FTE). In 2006-07, our first full fiscal year on the new site, we project total payroll of \$695,539 (a 42% increase), or an average of \$32,350/employee (9% increase/ 21.5 FTE). More employees will be permanent and eligible for benefits, which include fully paid medical benefits for employees; wellness and sick leave; a retirement plan; and paid holidays and vacation. As we generate more revenue at the new Center, we are committed to providing family wage jobs and benefits for all our employees.

The Center will indirectly create or retain jobs in reuse-related fields. Based on a 2002 report by the Institute for Local Self Reliance (ILSR), for every 1,000 tons of materials diverted from a landfill to reuse, 62 jobs are created. By conservative estimates, BRING now diverts 500 tons per year, and we expect to increase this amount significantly at the new site. Based on this formula, we can safely estimate creating or retaining a minimum of 30 jobs by investing in reuse.

The Planet Improvement Center will help to develop Lane County's workforce. BRING employs entry-level, low-skilled employees and trains them in basic construction and deconstruction skills, tools and equipment handling and maintenance, and workplace safety — skills that are transferable to other jobs.

The Center helps diversify our economy. It will attract tourists to this uniquely "Oregon" destination point, bringing out-of-area dollars to the local economy and indirectly contributing to job growth in the tourism sector. The Center positions BRING to be part of the burgeoning ecotourist industry. CVALCO has already asked us to provide tours and speakers for sustainable industry conferences and conventions they are working to bring to Lane County.

The Planet Improvement Center meets Strategic Plan Goal 5 of appropriate community development by moving its operations out of an inadequate and unsuitable site in the Willamette Greenway and redeveloping a distressed commercially zoned property in an enterprise zone and an area slated for urban renewal. The new site is more visible and accessible, with close proximity to Ecosort and Glenwood Central Receiving Station, making it more convenient for customers to stop first at BRING to unload reusable items on their way to the dump. The Center will draw customers into Glenwood and encourage development of related businesses, such as repair shops and antique/collectible shops. By providing of model of sustainable building techniques, it will stimulate other sustainable development. Located near the gateway to Springfield, the Center will help attract tourists and locals to downtown Springfield, complementing the city's efforts to revitalize the downtown core. By supplying low-cost building materials, it contributes to keeping housing stock affordable and in good repair.

## **2. Project Goals & Performance Measures (outputs & outcomes)**

### **Planet Improvement Center goals and objectives are to:**

- 1) increase the conservation of natural resources. We will increase the amount of used materials donated, resold, deconstructed and salvaged by a minimum of 10% per year in the first 3 years at the new site, measured by customer receipts and the number of deconstruction jobs completed.
- 2) attract and educate the broader community to reduce consumption and reuse materials. We will serve 10% more people per year, or 65,000 within 3 years, measured by education registration count and customer receipts.
- 3) create jobs and economic opportunity in reuse, deconstruction and recycling. We will add 6.5 FTE in new, permanent jobs at BRING in the first 3 years, measured by payroll records. Indirectly, we will create/retain 30 jobs in the reuse/recycling sector and stimulate jobs and growth in the tourism sector.
- 4) demonstrate a unique and replicable model of sustainable development for our region. We will increase by 10% per year the number of visitors and requests for information or tours from Lane County and beyond, and the number of mentions in regional media. A green planning grant from The Kresge Foundation will allow us to evaluate our sustainability as we build and educate the public about our process.
- 5) provide the inspiration, know-how and low-cost materials to make sustainability part of everyday life. While not a measurable goal, we will record anecdotal evidence of how we help individuals, businesses, organizations and government agencies change their behavior and become more sustainable as a result of our services.

### **Performance Measures (Outputs & Outcomes)**

**Output 1:** Phase 1 of the project will be completed by December, 2005. Costing \$1,362,000, Phase 1 accounts for 74% of the total project. It includes all the work necessary for BRING to begin operating from the new site including, infrastructure, a reception & education building, covered retail space, a covered loading and receiving area, office space, paved parking and bioswales for on-site storm water management.

**Output 2:** BRING will move onto the new site by March, 2006. Moving onto the site will allow us to maximize our investment in the property, consolidate our operations, and more effectively store, sort, price, display and add value to resale materials.

**Outcome 1:** We will increase the average pay/benefits package (wages, PR expenses, benefits) of BRING workers by 9% by June, 2007, from an average of \$29,700/employee in 2003-04 to \$32,350/employee in 2006-07, measured by payroll records.

**Outcome 2:** We will create or retain 6.5 FTE in permanent jobs at BRING by June, 2008 — 3 FTE in deconstruction, 2.5 FTE in reuse, .5 FTE in education, and .5 FTE in development. We will convert 2 FTE in temporary jobs in deconstruction into permanent jobs, and add 4.5 FTE in new jobs, for a total of 21 FTE, measured by payroll records.

**Outcome 3:** We will increase gross sales in reuse and deconstruction by 30% by December, 2008, measured by financial statements (December 2005 – December 2008).

The main barrier to project goals is that our current facility is inadequate to address current demand, let alone meet the growing needs of our community. The consequence if not funded in time for the 2005 building season is that the project is delayed for another year, making it difficult to retain funding commitments and enthusiasm among donors and prospective donors.

### **3. Selection & Involvement of Partners**

BRING has no formal partnership agreements to develop the Planet Improvement Center. However, in developing the project, more than 200 community leaders were interviewed about the project and its value to the community. A number of vendors have demonstrated the importance of the project by contributing significant time and resources above and beyond the terms of their contracts.

TBG Architects & Planners, Inc. is the lead designer for the project, coordinating the designers and engineers and helping to secure in-kind donations. They have contributed significant time and resources to the project.

Vik Construction is a leading commercial construction firm that will build the project. Greg Vik also lends his successful fundraising skills to the campaign.

Kate McGee, Landscape Architect, has donated countless hours to the initial planning of the project and now manages the landscape design.

Balzhiser & Hubbard Engineers, civil engineers, have donated in-kind services.

Rexius has committed to donating site amendments and assisting in building the bioswale and green roof.

Good Company provides expertise in green planning and design. With the help of a "green planning" grant from The Kresge Foundation, they are creating a process to evaluate our success at achieving sustainability and to educate the public about it.

Funk/Levis and Associates have contributed design services for campaign materials.

Jerry's Home Improvement Center has contributed construction materials.

Important stakeholders in this project include our major funders, including:

The Gray Family Fund of the Oregon Community Foundation (\$250,000)

Meyer Memorial Trust (\$110,000)

The Kresge Foundation (\$68,000 green planning grant – outside campaign budget)

Evergreen Hill Education Fund of the Oregon Community Foundation (\$50,000)

USDA Forest Service (\$48,500)

Weyerhaeuser Company Foundation (\$25,000)

Rose E. Tucker Charitable Trust (\$7,500)

US Bank (\$7,500)

as well as 225 individual and corporate donors (\$241,500).

In addition, hundreds of volunteer hours have gone into the planning and design of this project from past and present board members, professional planners, architects, and engineers. In-kind hours and activities total more than \$62,000 in *pre-campaign* contributions and \$15,600 in campaign contributions. (A complete list of in-kind donors is available upon request.)

*Lane County Economic Development Standing Committee*

**Budget Proposal & Narrative**

**Project Title:** Planet Improvement Center

**Section 4**

**Proposed Expenses.** The following Form may be expanded to one full page to describe specific project budget items and subcategories.

Budget Item	Description	Grant Funds	Percent of Grant Funds	Total Phase 1	Total Phase 2	TOTAL PROJECT
Professional Services:	Architects, engineers, etc.	0	0	\$ 95,000	\$ 27,000	\$ 122,000
Construction:	Contracts to build infrastructure, buildings, landscaping.	\$135,000	90%	839,000	340,000	1,179,000
Contingency:	5% of construction costs	0	0	44,000	18,000	62,000
Equipment:	Forklift, shelving, etc.	0	0	78,000	0	78,000
Art:	Art installations	0	0	0	40,000	40,000
Moving:	Moving expenses	0	0	22,000	0	22,000
Campaign Costs:	Campaign materials, consultants, fundraising personnel, misc.	15,000	10%	181,000	28,900	209,900
Bridge Financing:	To bridge gap between pledged funds and monies received	0	0	103,000	25,100	128,100
Total Matching Funds	Foundations, individual, corporate & in-kind donations, & other public funds (see below)			\$1,212,000	\$479,000	\$1,691,000
<b>TOTAL</b>		<b>\$150,000</b>		<b>\$1,362,000</b>	<b>\$479,000</b>	<b>\$1,841,000</b>

**Are other grants or funding sources being pursued for the same or similar proposal? If yes, please describe:** We are applying for other grants and soliciting for donations to complete the funding for the project. See funding sources, below.

**Revenue for the Project:** List the various cash and non-cash resources that contribute to completion of the project scope of work. Add lines for other partners.

FUNDING SOURCES	Description	Phase 1	Phase 2	TOTAL
PROPOSED GRANT	requested	\$150,000		\$150,000
<b>FOUNDATIONS</b>				
Meyer Memorial Trust	raised	\$110,000		
M.J. Murdock Trust	pending	\$200,000		
Woodard Family Found.	planned	\$25,000		
Coquille Tribe	pending	\$15,000		
Collins Foundation	planned		\$50,000	
Kresge Foundtion	planned		\$75,000	
Bill Healy Foundation	pending	\$10,000		
Rose Tucker Trust	raised	\$7,500		
Rex Foundation	committed	\$5,000		
Other	planned		\$25,000	
SUBTOTAL		\$372,500	\$150,000	\$522,500
<b>PUBLIC FUNDS</b>				
USDA Forest Service	raised			
Other	planned		\$15,000	
SUBTOTAL		\$48,500	\$15,000	\$63,500
<b>INDIVIDUAL DONORS</b>				
Gray Family Fund/OCF	committed	\$250,000		
Evergreen Hill Fund	raised	\$50,000		
Anonymous Donor	raised	\$50,000		
Others	raised/planned	\$197,000	\$215,000	
SUBTOTAL		\$547,000	\$215,000	\$762,000
<b>CORPORATE DONORS</b>				
Weyerhaeuser	raised	\$25,000		
Jerry's Home Improv.	pending	\$30,000		
Liberty Bank	pending	\$25,000		
Union Pacific	pending	\$15,000		
Springfield Creamery	raised	\$7,500		
US Bank	raised	\$7,500		
Others	raised/planned	\$50,500	\$50,000	
SUBTOTAL		\$160,500	\$50,000	\$210,500
<b>IN-KIND</b>				
Jerry's Home Improv.	raised	\$7,700		
TBG Architects	raised	\$2,000		
Gale Roberts Co.	committed	\$2,000		
Funk/Levis & Assoc.	raised	\$1,300		
Rexius	committed			
Others	raised/planned	\$70,500	\$49,000	
SUBTOTAL		\$83,500	\$49,000	\$132,500
TOTAL		\$1,362,000	\$479,000	\$1,841,000



## Budget Narrative

**Professional Services:** This category includes all technical services from architects, engineers, landscape designer, and consultants. TBG Architects & Planners, Inc. is the lead architect for the project. They are sub-contracting with Hohbach-Lewin, Inc. (structural engineer); Balzhiser & Hubbard Engineers (civil engineer); Interface Engineering (mechanical, plumbing & electrical engineer), and Kate McGee, Landscape Architect. The contract with TBG for Phase 1 is for \$95,000. The technical assistance grant from the USDA Forest Service is providing \$48,500 toward Phase 1 professional services.

**Construction & Contingency:** Construction costs are based on estimates provided by Vik Construction for new, conventional construction at full cost. Our goal is to include as many used materials as possible, materials which we may acquire at a very low cost. However, because used materials often require additional labor costs to adapt or incorporate them, we decided to keep the project priced at "retail" to cover any additional costs. The contingency expense allows for unforeseen expenses or increases.

**Equipment:** Forklift, shelving, carts, etc.

**Art:** Expense for art installations throughout the site is based on estimates from the art committee, headed by longtime Eugene artist and BRING board member Betsy Wolfston. The estimate assumes some materials donated from BRING.

**Moving:** The cost to move BRING's operations onto the new site is based on estimates provided by local moving companies.

**Campaign Costs:** This line includes the overhead necessary to run a capital campaign. Costs were estimated based on a percent of total to be raised, with additional assistance from the Collins Group in Portland. Campaign Costs include:

### Personnel:

Executive Director/Project Mgr. @ \$40,000/yr. x 2 yrs. x .5FTE =	\$ 40,000
Campaign Coordinator @ \$36,000/yr. x 3 yrs. =	\$108,000
Consultants (Collins Group, grant writer) – based on estimates	\$ 40,000
Campaign Materials (design, printing)- based on estimates	\$ 10,000
Database software, computers, back-up system & color printer	\$ 7,000
Postage, supplies, events, misc.	\$ 3,400
Pledge attrition (1%) - industry standard	\$ 1,500
<b>TOTAL CAMPAIGN COSTS</b>	<b>\$209,900</b>

**Bridge Financing:** It is expected that we will need to borrow money to bridge the gap between construction costs and receipt of pledged funds. This line also includes three years of interest-only payments on the new site (@ \$32000/year), while we refinanced the mortgage. We are already one year ahead of budget on this item, refinancing the mortgage this year (2004-05), thus eliminating one year of interest-only payments and now paying for the entire mortgage out of operations instead of the capital campaign.

*Lane County Economic Development Standing Committee*

**Project Performance Measures and Targets**

**Project Title:** Planet Improvement Center

**Section 5**

What are your proposed outputs and outcomes that will be used to measure success in meeting or exceeding the goal to create or retain jobs? Please see Attachment B for description of sample outputs and outcomes, and Attachment C for suggestions on creating performance measures for your proposed program. Which Oregon Benchmark (Attachment C) does the output or outcome related to? What is the project target for each output or outcome and when will results be reported?

<u>Outputs (amount &amp; frequency of project activity)</u>	<u>Oregon Benchmark</u>	<u>Project Targets</u>	<u>Reporting Timeframe</u>
OP1 Phase 1 completed	4	Work done & site ready for occupancy	12/05
OP2 BRING moves to new site	4	Operations ready to go at new site	3/06

Whenever possible list outcomes that will result from the project, even if these outcomes are measured after the proposed project contract term. The logic model in Attachment C further explains how to describe outputs and outcomes.

<u>Outcomes (impacts and long-term results from the project)</u>	<u>Oregon Benchmark</u>	<u>Project Targets</u>	<u>Reporting Date</u>
OC1 Increase average pay/benefit package of BRING workers	12	9% to \$32,350	6/07
OC2 Create/retain permanent jobs at BRING	4	6.5 FTE	6/08
OC3 Increase gross sales in reuse and deconstruction	6	30%	12/08

## Lane County Economic Development Standing Committee

Project Title: The Planet Improvement Center

### Section 6

#### Statement of Assurances and Proposal

The undersigned attests that the information provided to determine eligibility is true and accurate to the best of his/her knowledge. The undersigned further attests that he/she has the authority and/or responsibility to represent his/her organization in all phases of this Request for Proposal process. Finally, the undersigned understands that any false or substantially incorrect statement may disqualify this proposal from further consideration or be cause for termination of any further contract.

If this proposal is selected for funding, the undersigned provides assurances on behalf or his/her organization that the organization will comply with the General Conditions and Special Conditions in its subcontract with Lane County. The organization will also comply with all applicable federal, state, county and local statues, rules and funding criteria governing service, facilities and operations. Finally, the organization will submit all required reports, documents and forms within the allotted time for their submission.

The undersigned, as applicant, declares that he/she has carefully examined the specifications and requirements of the Lane County Request for Proposal packet and that applicant agrees, if the proposal is accepted, that applicant will contract with Lane County to furnish the services as specified, in accordance with the proposal offered here.

The Applicant hereby certifies that he/she is a resident bidder as defined in ORS 279.029, of the state of \_\_\_\_\_.

By initialing this space \_\_\_\_\_ applicant hereby certifies that he/she has not discriminated against minority, women, or emerging small business enterprises in obtaining any required subcontracts. By initialing this space \_\_\_\_\_ applicant hereby certifies that to the best of applicant's knowledge, he/she is in compliance with all the Oregon tax laws described in ORS 305.380(4).

The applicant represents that the proposal is in all respects fair and without collusion.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Printed or Typed Name and Title \_\_\_\_\_

Printed or Typed Agency Name \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_, day of \_\_\_\_\_  
200\_\_.

by \_\_\_\_\_

Notary Public for the state of \_\_\_\_\_. My commission expires \_\_\_\_\_.



CVALCO  
115 W 8th Ste 190  
PO Box 10286  
Eugene OR 97440



December 15, 2004

Lane Economic Development Standing Committee  
Lane County  
125 E 8<sup>th</sup> Ave  
Eugene, OR 97401

Phone: (541) 484-5307  
US & Canada:  
(800) 547-5445  
Fax: (541) 343-6335  
E-mail: [info@cvalco.org](mailto:info@cvalco.org)  
[VisitLaneCounty.org](http://VisitLaneCounty.org)

Dear LEDSC Members:

The Convention & Visitors Association of Lane County Oregon endorses the application of BRING Recycling for a \$150,000 business development grant from video lottery dollars.

The Planet Improvement Center being developed by BRING has real tourism potential in addition to its worthy core goals. This new 3-acre community facility will be a model of sustainable development where visitors from throughout the region and beyond can gather innovative ideas and inspiration for reusing materials and conserving resources. BRING's plan is to create an engaging learning center and theme park of reuse, waste reduction and conservation, including educational displays, workshops, library resources, a recycled garden, and art made from recycled materials.

The Planet Improvement Center will be a model of sustainable development, featuring a green building techniques and energy saving features.

CVALCO is currently working with local residents and organizations to invite conferences, conventions, and educational workshops to this area to discuss the newest innovations in sustainability concepts. We believe BRING's new facility will be a real and tangible asset that helps to position this area as a leader in an increasingly important field of study as well as applied business practices and life concepts.

As outlined in BRING's proposal, a video lottery grant will give BRING the ability to create and/or retain 6.5 FTE jobs as well as support indirect job creation of 30 positions throughout the community over three years.

I encourage you to give BRING's application careful consideration and award BRING's request for business development dollars.

Sincerely,

Kari Westlund  
President & CEO

**See All of Oregon in Lane County**



PETER A. DeFAZIO  
4TH DISTRICT, OREGON

TRANSPORTATION AND  
INFRASTRUCTURE

SUBCOMMITTEES:  
AVIATION, RANKING  
COAST GUARD AND  
MARITIME TRANSPORTATION  
RAILROADS

SELECT COMMITTEE ON  
HOMELAND SECURITY

SUBCOMMITTEES:  
INFRASTRUCTURE AND  
BORDER SECURITY  
EMERGENCY PREPAREDNESS  
AND RESPONSE



Congress of the United States  
House of Representatives

August 27, 2004

PLEASE RESPOND TO:

- ☐ 2134 RAYBURN HOUSE OFFICE BUILDING  
WASHINGTON, DC 20515-3704  
(202) 225-8416
- ☒ 151 WEST 7TH AVENUE, #400  
EUGENE, OR 97401-2649  
(541) 465-8732  
1-800-944-9603
- ☐ 125 CENTRAL AVENUE, #350  
COOS BAY, OR 97420  
(541) 269-2609
- ☐ 612 SE JACKSON STREET, #9  
ROSEBURG, OR 97470  
(541) 440-3523
- ☐ defazio.house.gov

Evelyn Anderton, President  
BRING Recycling  
P.O. Box 885  
Eugene, OR 97440-0885

Dear Ms. Anderton:

I am pleased to serve on BRING's advisory board and offer my wholehearted support for the Planet Improvement Center Campaign. I share BRING's vision of a sustainable community and the need to involve the community in the conservation and restoration of our natural resources.

I am excited the Planet Improvement Center will allow BRING to widen its efforts to educate the public and promote conservation. With space for tours, workshops, and demonstration projects, the facility will provide a variety of opportunities to engage the public.

Economic development is another key objective that has my support. BRING will be able to demonstrate how diverting construction materials from landfills creates opportunities to reuse them, saves public money, creates jobs, and diversifies the local economy.

This project enjoys wide community support from public agencies and individuals, foundations, and business. I am confident BRING Recycling will succeed with this ambitious project.

Sincerely,

PETER DeFAZIO  
Member of Congress

PAD:jck



**BILL MORRISETTE**  
**STATE SENATOR**  
DISTRICT 6  
STATE SENATE

Committees:  
Member:  
Joint Health and Human  
Resources Committee

Dec. 15, 2004

Lane County Economic Development Standing Committee  
Attention: Peter Thurston, County Administration Office  
125 E. Eighth Ave.  
Eugene, Ore. 97401

Dear committee members:

There's a fantastic project under way in my Senate District that is deserving of an economic assistance grant from Lane County. I urge you to fund BRING Recycling's request to help it build the Planet Improvement Center in Lane County.

BRING is a true home-grown success story and an organization that has benefited Eugene, Springfield and all of Oregon greatly. Thirty years ago, it pioneered recycling, and its leadership in this arena was instrumental in making recycling a part of our everyday life. BRING is an innovator in reusable building products, electronics recycling and many other ways we can recycle, reuse and reduce materials that otherwise would go into landfills or into our environment.

The proposed Planet Improvement Center is another innovation, combining BRING's reusable building products operations with an education center that will promote sustainability.

BRING serves an important role in Lane County's sustainable economic development efforts. The organization is the only major source of inexpensive, reusable building products for lower-income citizens of Lane County. Builders rely on BRING for a wide variety of products to help them renovate and build homes and commercial buildings. BRING also provides job opportunities for many lesser-skilled workers who are struggling in today's economic climate. Finally, the work that BRING does fits perfectly with Oregon's goal of developing a more sustainable economy for the state.

I'm also excited about how this project can fit into the city of Springfield's vision for redeveloping Glenwood, an economically depressed area along the Willamette River just east of Interstate 5. With recent passage of a citywide urban renewal district ballot measure, BRING's commitment to Glenwood will help revitalize this area.

Sincerely,

Sen. Bill Morrisette  
Oregon Senate District 6



**FLOYD PROZANSKI**  
State Senator

DISTRICT 4  
503-986-1704



REPLY TO ADDRESS INDICATED:

- ☐ 900 Court St NE  
Salem, OR 97301  
☒ P. O. Box 11511  
Eugene, OR 97440

**OREGON STATE SENATE**  
900 COURT ST NE  
SALEM, OREGON 97301

December 14, 2004

Lane County Economic Development Standing Committee  
Attention: Peter Thurston  
County Administration Office  
125 East 8th Ave.  
Eugene, OR 97401

Dear Economic Development Committee members:

As a former board member of BRING Recycling, I am glad to offer this letter in support of BRING Recycling's Planet Improvement Center Project. I served on the Board of Directors for 10 years (1989-99).

BRING is responsible for pioneering recycling in Lane County and has, for more than 30 years, continued to break new ground and keep the Reduce, Reuse and Recycle message before the public. It has taught thousands of Lane County schoolchildren the importance of conservation as a social ethic necessary to the health and welfare of our community and the world. Thousands of adults have received the same message at community events, business conferences and neighborhood gatherings. BRING also sponsors special collection events, radio spots and a quarterly newsletter.

As a result, recycling in Lane County has become a core community value, something citizens both expect and take for granted. It has been so successful that Lane County has achieved one of the highest recovery rates in Oregon. Few counties nationwide can boast such a comprehensive plan.

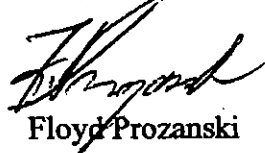
The population of the region is expected to double over the next 25 years. More people means increased waste and more pressure on the environment. BRING is currently developing a new facility in the Glenwood area. It will greatly increase BRING's ability to provide these important services and allows it to tackle the urgent need to promote sustainable practices. This new site also will allow BRING to expand its education program, handle more materials and increase the amount of products and



materials that are reused. This will benefit the regional economy as reuse and recycling creates more jobs. It also will extend the length of the county landfill by reducing the amount of waste.

BRING is recognized as a leader in the field of waste reduction, reuse and recycling. Its new facility will be a regional destination that will benefit Oregonians for years to come. I endorse BRING Recycling's goal to develop this new facility and hope that the M.J. Murdock Charitable Trust also will support this effort. The entire Lane County region will benefit from this community project.

Very truly,

A handwritten signature in black ink, appearing to read 'F. Prozanski', written over the printed name.

Floyd Prozanski



**CITY OF SPRINGFIELD, OREGON**

OFFICE OF THE MAYOR / CITY COUNCIL



225 FIFTH STREET  
SPRINGFIELD, OR 97477  
(541) 726-3700  
FAX (541) 726-2363

November 3, 2003

Julie Daniel  
BRING Recycling  
P.O. Box 885  
Eugene, OR 97440-0885

Dear Ms. Daniel,

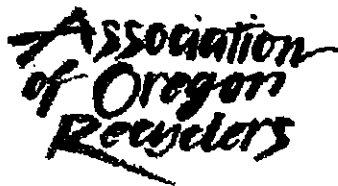
We are excited that BRING Recycling, one of the nation's oldest non-profit recycling organizations, is redeveloping a site in Glenwood. BRING has been part of our community for 33 years. They pioneered recycling in Lane County and their ongoing commitment to education and conservation has helped us achieve statewide recognition for having the highest resource recovery rate in Oregon. For thirty years Springfield school children have learned the importance of the three R's, Reduce, Reuse and Recycle, from BRING's education team. Booths at community gatherings and fairs such as the Filbert Festival promote the same important message to the community at large. Thousands of customers come from all over the county to find inexpensive used building materials and other items at BRING's warehouse. Hundreds of people take advantage of BRING sponsored events to recycle computers and televisions or to buy low cost home compost bins. BRING is a community resource that has made a significant contribution to the quality of life in our community.

Today, more than ever, wise use of our natural resources is essential. The City of Springfield understands the importance of sustainability and is committed to reducing waste in its own operations. Waste is opportunity lost; opportunity to create jobs, opportunity to save raw materials, opportunity to develop our local economy and preserve the environment at the same time. BRING's new site will put the spotlight on waste, demonstrating how we can do more with less. It will attract visitors from around the northwest to our community and provide an example that others can learn from.

The City of Springfield enthusiastically supports BRING's goal to develop a new facility and endorses their efforts to move our community toward a more sustainable future.

Sincerely,

Mayor Sid Leiken



**Chair**  
**Alex Cuyler**  
City of Eugene  
88 W 10<sup>th</sup> AVE  
Eugene, OR 97401-3016  
541-682-6830

**Secretary**  
**Tanya Baker**  
City of Vancouver  
1300 Franklin ST RM 185  
Vancouver, WA 98660-2885  
360-696-8186

**Treasurer**  
**Jason Hudson**  
Hudson Garbage Service  
PO BOX 1002  
Saint Helens, OR 97051-8002  
503-397-1534

**Markets**  
**Les Joel**  
Blue Heron Paper Co.  
419 Main St.  
Oregon City, OR 97045-1809  
503-660-4206

**Legislation**  
**Rick Winterhalter**  
Clackamas County  
9101 SE Sunnybrook BLVD  
Clackamas, OR 97015-8612  
503-353-4466

**Education**  
**David Larmouth**  
Western Oregon Waste  
PO Box 509  
McMinnville, OR 97128-0509  
503-474-4847

**Special Projects**  
**Cheryl Wilhelm**  
Far West Fibers, Inc.  
PO Box 1139  
Hillsboro, OR 97123-1139  
503-643-9944

**AOR Office**  
**Charlotte A. Becker**  
PO Box 483  
Gresham, OR 97030-0107  
503-661-4475  
FAX 503-524-2373  
mail@aorr.org  
<http://www.aorr.org>

December 15, 2004

Mr. Peter Thurston  
Lane County Economic Development Standing Committee  
County Administration Office  
125 East 8th Ave,  
Eugene, OR 97401

Dear Economic Development Committee members:

The Board of Directors of the Association of Oregon Recyclers understands that BRING Recycling, Eugene, Oregon, is pursuing funding from the Economic Development Strategic Investment Program to support the development of an educational center based on reuse and recycling. We hope that you will evaluate their proposal carefully and trust that you will find it to be worthy of your support. BRING's customer base includes a high percentage of individuals from rural Lane County.

BRING Recycling has been a member in good standing of the Association of Oregon Recyclers (AOR) since 1977. AOR presented BRING Recycling with a special category award in 2001 for 30 years of continuous operations and commitment to waste reduction, reuse and recycling. BRING is synonymous statewide with creativity, education and inspiration when it comes to resource conservation. They have a long history of pioneering new opportunities to recycle in Lane County, including development of the curbside collection program, milk carton recycling, electronics collections, athletic shoe recycling, building materials salvage and building deconstruction.


BRING's next project involves redeveloping a site located between Eugene and Springfield. They plan a facility that will combine their existing used building materials outlet and administrative offices with an education center to promote reuse and sustainable living. This move will increase their visibility and make it possible for them to increase their level of service to the community. They plan to build a site that embodies the educational services they've continually supplied to the residents of Lane County.

The new site supports local and state goals to conserve resources through increased waste reduction and reuse. Moreover, the site will provide the focus their educational message. In today's world of convenient, commingled curbside recycling, education remains challenging. Our members are concerned that Oregonians no longer believe recycling works and have expressed that contamination by non-recyclable material is a growing concern.

The AOR membership is comprised of businesses and governments that work on recycling issues day in and day out. We know recycling works, but consistent, comprehensive and quality recycling education is an absolute must if future recycling and reuse markets are to remain robust.

The Board of Directors of the Association of Oregon Recyclers enthusiastically endorses this project and urges the committee to lend its financial support to BRING's development of a regional destination that will allow expanded education programs and increased diversion of used materials.

Sincerely,

  
Alex Cuyler  
Chair

Attachment C

Revd 12/8/04



LAND MANAGEMENT DIVISION  
[http://www.LaneCounty.org/PW\\_LMD/](http://www.LaneCounty.org/PW_LMD/)

November 29, 2004

Lane County Economic Development Standing Committee  
Attention: Peter Thurston

(Hand Delivered)

Jeff Towery, Manager  
Land Management Division

Subject: Lane County 2004-05 Economic Development RFP June 2004


Proposal: LMD Interactive Voice Response (IVR) Permitting System

The Lane County Land Management Division respectfully submits the attached proposal for review for funding by the Lane County Economic Development Project.

Please contact me if additional information or documentation is needed.

Thank you for providing this opportunity and your consideration of our request.

Sincerely,

  
Jeff Towery  
LMD Manager



**Lane County Economic Development Project**

**Section 1 - Proposal Cover Page**

Grant Amount Requested \$ 80,000.00 Match Amount Proposed \$ 23,400.00

Please select the appropriate box for this application: [ ] 2004-05 Initial Proposal Cycle,  
[ X ] 2004-05 Open Proposal Cycle. Eighty percent (80%) of points is the minimum required to  
qualify for funding consideration.

Project Focus (Required – select one category of economic development): [ X ] Business  
development, [ ] Workforce development.

**PROJECT TITLE: LMD Interactive Voice Response (IVR) Permitting System**


Principal Project Organization: Lane County Land Management Division  
Address: Public Service Building  
125 East 8<sup>th</sup> Avenue  
Eugene, OR 97401

Project Contact Person: Jeff Towery  
Phone: 541 682-4349 Fax: 541 682-3947  
E-mail: [Jeffrey.Towery@co.lane.or.us](mailto:Jeffrey.Towery@co.lane.or.us)

Person/Agency preparing fiscal reports: Jeff Towery  
Title: Land Management Division Manager  
Address: Public Service Building  
125 East 8<sup>th</sup> Avenue  
Eugene, OR 97401  
Phone: 541 682-4349 Fax: 541 682-3947  
E-mail: [Jeffrey.Towery@co.lane.or.us](mailto:Jeffrey.Towery@co.lane.or.us)

Our representative, Jeff Towery, attended the pre-proposal conference on behalf of this project.  
(name)

Signature of Applicant and each Partner included in Proposal (Copy and use additional sheets as  
needed)

 _____ Signature	<u>11-29-04</u> _____ Date
<u>Jeffrey R. Towery / Manager</u> _____ Typed Name / Title	<u>Land Management Division</u> _____ Applicant Organization

_____ Signature	_____ Date
_____ Typed Name / Title	_____ Partner Organization

## ***Lane County Economic Development Project***

### **Section 2 - Project Summary**

#### **Project Title: LMD Interactive Voice Response (IVR) Permitting System**

This project proposal fits in the Business Development category in that it seeks to strengthen the partnership between the construction community, private property owners, and County government by implementing an Interactive Voice Response (IVR) permitting system within Lane County Land Management Division (LMD). LMD is responsible for processing and coordinating land use, building and sanitation permits within the rural landscape and some urban growth boundaries of Lane County. The success of this project will be in the creation of a more accessible and responsive permit process with cumulative benefits that will save time and money for all the players, private and public, in the development scenario.

The three Lane County Land Management Division (LMD) programs (Building, Sanitation and Planning) interact on a daily basis with property owners, contractors, and consultants in the processing of land use and development permits. The Division is intent on improving the experience these parties have with LMD and providing a service that is increasingly more efficient.

The current contacts are based predominantly on:

- face-to-face applications for mechanical, plumbing and electrical permits at the customer service counter in the LMD lobby;
- call-in requests for scheduling appointments for review of construction projects by the three programs;
- voice-mail requests for next-day, onsite inspections;
- call-in to the LMD switchboard with requests for permit status including building permit approval timelines;
- voice-mail requests for next-day, onsite inspections; and
- follow-up call-in requests for onsite inspections results.

These services to the public require a commitment of time and expense by citizens and LMD personnel that could be more efficiently conducted through the implementation of available online systems. The LMD Management Team has identified e-commerce systems used by other jurisdictions that have immediately improved the communication of needs and an increased efficiency in responding with timely services. As the old adage states, "Time is money", and in the construction trades the effort to secure building permits, schedule inspections, and coordinate subcontractors on a job site should be as responsive and fluid as feasible. This requires interaction between the aspirations of property owners and commitment of private sector professionals with the Building Program's mission to protect the health and public welfare of Lane County citizens.

Implementation of an IVR permitting system is a commitment that is addressed in Lane County's Strategic Plan goals to:

- (1) Work for a strong regional economy;**
- (2) Contribute to appropriate community development; and**
- (3) Provide efficient and effective financial and administrative support and systems to direct service departments.**

**Procurement and implementation of an IVR system will also accomplish the following LMD strategic goals:**

- (1) Decrease permit processing time by redirecting public inquiries to an automated application, thereby allowing staff more time to devote to permit processing;**
- (2) Increase customer satisfaction by providing the customer with convenient, reliable and immediate access, 24 hours, seven days a week, to do such things as get general information on the permit process, check permit status and schedule or get the results of an inspection; and**
- (3) Improve the timeliness of information updates to permit records by giving inspectors the capability to enter inspection results into the permitting system while still in the field.**

## ***Lane County Economic Development Project***

### **Section 3 - Project Narrative**

**Project Title: LMD Interactive Voice Response (IVR) Permitting System**

#### **1. Project Focus and Scope**

As part of LMD's multiple-year investment strategy for reaching the goal to provide its customers a more responsive and efficient permitting system, it has committed nearly \$127,000 in its FY 04-05 budget to support e-commerce efforts through staff in the Information Services Department – Web Services Division. By applying for this EDSC \$80,000.00 grant, LMD seeks to purchase an Interactive Voice Response (IVR) package from a reliable vendor to accelerate the implementation of the necessary telephone and online systems for the benefit of the private and public sector players.

The LMD Management Team has identified six every-day functions that need to be readily available to the public by telephone and the Lane County Internet website that would be implemented through the IVR permitting system:

- (1) applying for electrical, mechanical and plumbing permits;
- (2) requesting timely inspections of permitted projects;
- (3) offering citizens the option to use e-checks and credit cards when applying by telephone or online for permits;
- (4) offering an on-line catalog of services and downloading of Building, Planning, and Sanitation program handouts, application forms, and certification documents;
- (5) offering a tailored alert management system for customers with several layers of options including notices of pending applications (building, sanitation, planning); and
- (6) availability of information responses for a myriad of common information inquiries.

Implementing an IVR permitting system will provide an opportunity for enhanced efficiency within development partnerships, including the Home Builders Association, building and design professionals, and small cities in Lane County. We envision working with both private and public sector partners in the implementation of the IVR telephone system as well as including training and marketing efforts for development of remote sites to provide access for citizens who may not have personal access to the Internet. We believe that access and education are two of the key factors for providing a successful IVR system for submittal, review and administering of building permits. Implementation of the above six functions via the IVR platform will significantly enhance LMD's ability to inform and serve the public.

While the impacts are difficult to forecast, we have learned from the City of Bellevue, WA that their two-year-old IVR and online services (MyBuildingPermit.com) resulted in immediate successes. In 2003 the program saw 44.8% of mechanical permits and 38.2%

of plumbing permits processed by telephone or online. So far in 2004, 44.0% of mechanical permits and 46.5% of plumbing permits have been processed by telephone or online.

These levels of services will equate to time and expense savings for customers and more effective customer service to the public by LMD staff. Benefits to the rural customer are realized in eliminating the round-trip time and travel costs of driving to Eugene and parking fees. For a contractor this means unnecessary time away from a job site. For a property owner it often means taking time off from work to be at the LMD customer service desk to file out application forms and pay for the permit. This also entails waiting with other customers for a service that is one of numerous building, sanitation or land use services administered by LMD personnel during the 9:00 AM to 4:00 PM period, Monday through Friday. The turnaround drive times can range from 45 minutes to 3 hours for rural citizens with an additional face-to-face submittal process from 15 minutes to 30 minutes. Figuring an average wage and benefits of \$15.00 minimum, the loss of income could be \$15.00 to \$45.00 with gas and parking tacking on an additional \$3.00 to \$ 15.00 with a total outlay of \$18.00 to \$60.00.

LMD issues approximately 50 mechanical or plumbing permits and 200 electrical permits per month. Just these permit categories alone equal over 3,000 permits and 1,000 office visits per year. With 50% (500) of the applicants using the IVR service at an average savings (expense) of \$39.00, a conservative estimate for annual savings to the private citizens could be \$19,500.

In addition to the permits cited above, the IVR system is anticipated to reduce the requirement and expenses for citizens to visit LMD for a number of other building permit functions including:

- Building permit review appointments
- Building permit final billing & payments
- Building permit reports
- Rural addressing permits
- Inspection requests

Thousands of person-to-person telephone calls and office visits are currently necessary during each year for citizens or consultants to acquire Building, Planning, or Sanitation program information handouts, application forms, and certification documents. These documents would be cataloged in a user-friendly format and made available via IVR at any time and thus provide an option for the need for a trip to LMD during office hours.

The implementation of these website services will directly benefit LMD staff's role with the public who choose to continue to face-to-face with the customer service counter. All departments have experienced an increase in demand for services and a reduction of personnel though declining revenues and budget cutbacks. The dilemma for any public agency is to stretch to cover the gaps left by cutbacks and still serve the public demand effectively. LMD intends to use the recovered time to offer a higher quality of service to walk-in citizens in the lobby. For example, a ten-minute information session can be



stretched to 20 minutes to better inform or explain the details of the process or a permit application.

This IVR permit system will greatly increase the options for customers to acquire information and process applications. It will expand service hours for retrieving information handouts and application forms, as well as the submittal of specific permits and payment of fees to a 24-hour, seven-day week.

*Lane County Economic Development Standing Committee*

**Section 4 – Budget Proposal and Narrative**

**Project Title: LMD Interactive Voice Response (IVR) Permitting System**

**Grant total: \$ 80,000.00**

**Proposed Expenses.**

LMD needs to purchase an off-the-shelf, Interactive Voice Response (IVR) system capable of providing all of the services outlined in the Project Focus and Scope subsection of Section 3 – Narrative.

LMD and Information Services Department –Web Services Division has completed a analysis of the requirements for the proposed IVR and will be distributing a Request For Proposals to IVR vendors on December 1, 2004. A copy of the RFP is attached. The period for responses from IVR vendors will close on January 31, 2005, and LMD-IS intend to complete the selection process by February 28, 2005. Configuration and customizing of the selected IVR system will be accomplished during March with an implementation date of March 25, 2005.

Seven members of LMD staff will be responsible for creating the forms and documents that will be uploaded and coordinating the project with two ISD-WSD programmers. The FTE salaries and directs are estimated to be \$23,400.00.

This request is solely for the purchase of an off-the-shelf IVR package at an estimated cost of \$80,000.00 that will be funded by the grant as itemized below.

Budget Item	Description	Cost Estimate	Grant Funds	% of Grant
1.	Lane County Information Services and Land Management Division	\$ 23,400.00	\$ ----	0%
2.	Interactive Voice Response (IVR) system	\$ 80,000.00	\$ 80,000.00	100%
TOTALS		<u>\$ 103,400.00</u>	<u>\$ 80,000.00</u>	<u>100%</u>

Please refer to Attachment "A" - LCIS LMD IVR Request For Proposal (RFP) prepared by Kevin King of Lane County Information Services in response to the request by Land Management Division for a detailed analysis of the objectives, expenses, project requirements, timelines, and implementation guidelines for the proposed Interactive Voice Response (IVR) permitting system.



# **LMD Permitting System IVR**

## **Lane County IS Project Charter**

**Customer/Client:** Public Works – Land Management Division (LMD)

**Priority:** URGENT

**Project Manager:** Kevin King

**Sponsor Name & Title:** Jeff Towery, Land Management Division Manager

**CBA Completed/Attached** Yes ☐ No ☐ N/A ☒

**Project Request Form Completed** Yes ☒ No ☐ N/A ☐

### **Project Overview / Business Drivers**

Public Works (PW) Land Management Division (LMD) seeks to acquire and implement, through development and/or procurement of the necessary components, an Interactive Voice Response (IVR) application system. An IVR application automates routine customer interactions by use of a telephone interface. Implementation of IVR meets a Lane County Plan core strategy (A3) for Service Improvement by promoting electronic access to public services.

Procurement and implementation of an IVR system will accomplish the following LMD strategic goals: 1) decrease permit processing time by redirecting public inquiries to an automated application, thereby allowing staff more time to devote to permit processing; 2) increase customer satisfaction by providing the customer with convenient, reliable and immediate access, 24 hours, seven days a week, to do such things as get general information on the permit process, check permit status and schedule or get the results of an inspection; and 3) improve the timeliness of information updates to permit records by giving inspectors the capability to enter inspection results into the permitting system while still in the field.

### **Goal Statement: Business Benefits / Expected Outcome**

LMD expects to increase revenue, through an increase in staff productivity and quality achieved by reducing interruptions to staff, allowing them more time to process permit applications and provide value-added consultation to customers on larger, more complicated projects.

## Objectives

- Secure, remote 24/7 telephone access to a variety of information pertaining to a permit: type of permit, job site address, name of applicant, date applied, current status, information or actions needed to continue application processing, next inspection required, next inspection scheduled, status of last inspection, fees owed, name of Lane County staff member currently responsible for processing the application, etc; and to conduct limited permit and inspection scheduling transactions.
- Customizable telephone user interface that provides clear, logical prompts that can be easily navigated by most callers; flexibility to customize search criteria accepted and information returned.
- Effective, reliable English language speech recognition in prompts with the possible addition of Spanish language speech recognition.
- Dynamic read and update access to the permitting application database via an application program interface (API).
- Delivery of static information and documents by means of voice broadcast or fax transmission.
- Secure, remote authorized and authenticated staff access to the permitting system database for updating permit records from the field.
- Capability to route LMD customers to the phone extension of the staff member currently processing the permit application.
- IVR application portable to other permitting systems.
- Administration by functional staff (power users).
- Customers can purchase simple permits.
- Automatically call customers for such reasons as reminders about overdue fees or permit near expiration.
- Enable customer scheduling of permit application review meetings.

**Required Major Deliverables - Product(s), Feature(s), or Service(s)**

Deliverable	Description	Priority H/M/L	High-level Est./Cost	High-level Est./Time
RFP	Document LMD business case & requirements to solicit bids for IVR.	H	\$8,100.00	180 hrs LCIS/LMD
IVR System Integration Plan	Strategy for integrating IVR into existing computing infrastructure.	H	\$1,800.00	40 hrs LCIS
IVR Selection	Compare and contrast RFP responses for best fit to LMD requirements.	H	\$2,700.00	60 hrs LCIS/LMD
IVR Procurement	IVR solution is procured; vendor notified and installation scheduled.	H	\$80,000.00	<sup>ii</sup> IVR system
IVR Installation	Accept and install IVR servers and software.	H	\$1,800.00	40 hrs LCIS
LMD-specific IVR solution	Onsite setup, configuration & customization of IVR – Permits Plus interface per RFP requirements.	H	\$3,600.00	80 hrs LCIS/LMD
IVR Requirements Met	Perform internal/external tests to ensure IVR meets RFP requirements.	H	\$1,800.00	40 hrs LCIS/LMD
Documentation and Training	Document IVR application as implemented and create end-user and/or staff educational materials.	M	\$1,800.00	40 hrs LMD
Go-Live	IVR phone line made active, system enabled for productive use, public notified	H	\$1,800.00	40 hrs LCIS/LMD
High Level Cost Estimate Totals			\$103,400.00	520 hrs

**Known Project Requirements**

Requirement	Description	Priority H/M/L	Sponsor
Administration can be performed by functional staff	Provides easy-to-use remote administration of IVR application by LMD staff	H	LMD
Automatically call-out to customers	IVR automatically calls customers to remind about overdue fees or permit expiration or of compliance deadlines; provides instant customer access to resolve outstanding items.	H	LMD

<sup>i</sup> Assumes average rate of \$45.00/hr<sup>ii</sup> Estimated cost of IVR based on quotes provided by Accela and Selectron prior to RFP

**Known Project Requirements**

<b>Requirement</b>	<b>Description</b>	<b>Priority H/M/L</b>	<b>Sponsor</b>
Capability for permit applicant to schedule inspections	IVR enables customer update of Permits Plus calendar to automatically schedule inspections.	H	LMD
Custom prompt recording/script changes	IVR application provides maximum flexibility for functional staff to modify prompts and scripts to accommodate changes in business practices or workflow.	H	LMD
English Speech Recognition	IVR properly interprets nuanced speech by English language speakers.	H	LMD
IVR product demonstration	Vendor will agree to provide IVR product demonstration that simulates specific LMD permitting business practices, if requested.	H	LMD
Meets implementation schedule	Vendor can commit to immediate implementation of IVR to productive use on notification of award of contract.	H	LMD
Meets regional (RIO) standards for secure telephony integration into computer network environment	IVR system seamlessly integrates with existing computer-telephony network infrastructure, including robust functionality for secure access using industry-standard methods/tools.	H	LCIS
On-site installation services & training	Vendor provides technical resources onsite for installation, configuration and testing of IVR application software; provides formal and informal staff training for administration of system.	H	LMD
Portability	IVR system can be migrated to a different permitting system, in which case Vendor will provide (at County expense) tailored application interface software; porting of IVR requires minimal user intervention and no changes to hardware configuration.	H	LMD
Provides capability for caller to retrieve specific information for a specific permit	IVR retrieves specified information from permit system database via API according to business rules programmed into the application.	H	LMD
Provides capability to route caller to LMD staff member currently working permit	IVR provides intelligent call routing – seamless interface with existing PBX/Voicemail system connecting callers easily to a LMD resource.	H	LMD
Remote access for technical support	Vendor must support LCIS accepted methods for ensuring secure access to the IVR server(s) (e.g., static port assignment, two-part authentication and a non-dialup connection such as a SSL VPN or VPN.)	H	LCIS

## Known Project Requirements

Requirement	Description	Priority H/M/L	Sponsor
Requires software upgrades to server/application and routine maintenance	IVR vendor provides regular updates and upgrades to application software which requires LCIS resources to install, configure and test; IVR server(s) requires OS updates and other maintenance by LCIS.	H	VENDOR
Secure, remote update capability for field staff	Inspectors can call the system remotely to report on completed and in-progress inspections.	H	LMD
SQL Server database integration via application servers	IVR provides full capability to connect application to Microsoft SQL Server 2000 database servers (e.g. ODBC or OLE DB) and perform secure transactions via an IVR application server.	H	LCIS
Successful history with Accela Permits Plus API	Vendor has installed an equivalent IVR configuration with at least one other government jurisdiction also using Accela's Permits Plus, and said installation has successfully been in productive use for at least 12 months prior to the date of the response. Vendor will provide functional and technical contact information for this jurisdiction.	H	LMD
Technical support via phone, web, fax or email available between 0800 to 1700 hrs Pacific Time	IVR Vendor provides responsive technical support to sustain operations with minimum interruptions of service.	H	LCIS
Text-to-speech	IVR supports previously recorded speech and computer generated speech synthesis for spoken system prompts/responses to callers.	H	LMD
Vendor responsiveness and timeliness of IVR updates to accommodate an urgent Microsoft OS patch	Vendor must have procedures in place for installing emergency patches to their application software in response to Microsoft issued security patches	H	LCIS
Can be used to provide information to users	Can automatically answer frequent questions: LMD location (and directions), permitting policies, hours of operation, payment procedures.	L	LMD
Expandability	IVR platform can be expanded to include other database application interfaces between Permits Plus (or another permitting system) and the customer, such as GIS, e-payment.	L	LMD
Spanish Speech Recognition	IVR properly interprets nuanced speech by Spanish language speakers.	L	LMD
24 x 7 x 365 technical support via phone, web, fax or email	IVR Vendor provides technical support after normal business hours.	M	LCIS

## Known Project Requirements

Requirement	Description	Priority H/M/L	Sponsor
Analysis tools and reporting	Staff can generate standard reports to determine usage trends, specific user "paths" through the system (to identify most often used features or most problematic menus,) inbound/outbound call/fax volume, features used, caller ID, etc. IVR also provides flexible and user-friendly custom reporting capabilities.	M	LMD
Automatic faxing	IVR will provide automatic faxing and/or internal printing of documents (for postal mailing) to customers based on events that fire within Permits Plus, such as a status change to ISSUED.	M	LMD
Caller friendliness & flexibility	IVR dialog can be interrupted at any point by speaking a menu name or selecting a menu option from keypad. IVR supports "go-forward" menu selections; IVR call flow is navigable from any point in the menu tree to any other point in the menu tree; each menu has option to go back one level or go back to main menu or go directly to an alternate menu.	M	LMD
Capability for permit applicant to schedule application review meeting	IVR enables customer update of Permits Plus calendar to automatically schedule application reviews meetings.	M	LMD
Customers can purchase simple permits	IVR application supports insert/update transactions in Sierra database, including fee payment.	M	LMD
Documents on demand	IVR will provide informational documents on-demand when selected by customers via fax or internal printer for postal mailing.	M	LMD
Fax interface	IVR system must be compatible for connectivity with RightFax server software, if connection to centralized fax serving is necessary.	M	LCIS
IVR configuration compatible with LCIS-standard hardware and Microsoft Windows server software and support software	IVR system can run on LCIS preferred server hardware, be housed in 19" racks, comply with LCIS physical requirements, and is fully compatible with current versions of Microsoft Windows server products such as Microsoft Operations Manager and Microsoft SMS.	M	LCIS
Scalability	IVR system can be implemented cost-effectively to serve a relatively low call volume, but be expanded easily and affordably to meet increased demand.	M	LMD
Supports full array of user devices	IVR can be used via standard telephone, cellular telephone or any other telephony-enabled device.	M	LMD



## Known Project Requirements

Requirement	Description	Priority H/M/L	Sponsor
System Backup	IVR system must be compatible with HP Data Protector backup software and provide for data to be backed up while the system is online.	M	LCIS
Virus Protection	IVR system must be compatible with Trend Micro's Server Protect virus protection software.	M	LCIS

## Timing Expectations & Milestones

Date	Milestone
8/19/2004	Planned Start Date
8/31/2004	IVR Steering Committee begins meeting
10/25/2004	RFP for IVR system submitted to legal counsel
12/01/2004	RFP published
1/31/2005	IVR vendor response period closes
2/28/2005	IVR vendor selection process completed
3/01/2005	IVR configuration, customization begins
3/25/2005	IVR system go-live
3/31/2005	Latest End Date

## Business Timing Drivers

- Project must be completed while LMD Power Users and other staff have maximum availability due to winter slow-down in permit applications.
- Funding for this project was granted with an expectation that it would be completed in FY2005.
- LMD has indicated IVR access to their permitting system is their highest priority.

## Resources Needed

- LCIS/WS (applications/systems analysts, web server administrator, security analyst, manager).
- LCIS/RIS (regional network analyst, security analyst, manager).
- LCIS/TS (network server administrator, network analyst, CTI analyst/administrator, Windows OS security analyst, manager).
- LCIS/AS (DBA).

- LCPW/LMD (Building Official, Senior Building Inspector, Sanitarian, Compliance Officer, Plans Examiner, Permits Plus administrator, department managers, director).
- Computer hardware is largely constant across solutions. IVR will require at least one dedicated server with at least four ports/phone lines of telephonic access to handle LMD call volume; an additional port/phone line might be required for Vendor technical support access. A server will cost about \$5,000 and the telephony interface about \$2,500.

### **Schedule / Resource Constraints & Assumptions**

#### **Constraints:**

- Project milestones conflict with winter holiday season; many key resources might be unavailable due to TM.
- Scheduling constraint: A vendor provided turnkey IVR solution will require an RFP - procurement cannot begin until RFP process is completed.
- Scheduling constraint: Annual Permits Plus version upgrade must be completed concurrent with IVR project (due to LMD resource availability during off-season.) IVR implementation conflicts for resources with Permits Plus version upgrade; timing of Permits Plus upgrade is contingent on release date by Accela.
- Resource constraint: RFP and IVR design process requires high participation of key LMD functional resources from Admin, Building, Sanitation, Planning and Compliance; these same resources are also committed to permit processing and a concurrent Permits Plus upgrade.
- Resource constraint: IVR system implementation will require several key LCIS resources already dedicated to other projects and support.

#### **Assumptions:**

- LMD has secured all necessary funding and the IVR solution chosen will satisfy the requirements of budget allocations and grants.
- LMD will dedicate the necessary resources to the extent necessary for successful accomplishment of this project.
- LCIS will approve and support IVR solution chosen by LMD.
- LCIS has the resource bandwidth to support an immediate implementation of an IVR system.
- Vendor chosen through RFP process will have the resource bandwidth to meet LMD schedule milestones.
- IVR solution chosen will perform as advertised when implemented.

## Technical Constraints & Assumptions

### Constraints:

- IVR system implementation requires security issues be satisfied before project can move forward.
- IVR application requires an application program interface (API) to Permits Plus to achieve much of the desired functionality. Inversely, IVR functionality is limited to what the Permits Plus API supports.
- Implementation of IVR potentially requires DBA support for database server configuration and load testing; DBA resources are already committed to other higher-priority projects scheduled concurrently.

### Assumptions:

- If LMD changes permitting system from Permits Plus to another vendor product, the IVR vendor is willing/able to produce an API that can reproduce equivalent functionality as with Permits Plus.
- IVR vendor will provide the Permits Plus API with ongoing programming maintenance updates synchronized with Accela's Permits Plus upgrades.
- Data is available in Permits Plus to support functionality required by LMD (calendars for inspections, compliance notifications, ticklers, meetings, etc., are setup and used; zoning information is input into Permits Plus, etc.)
- Accela will continue to support Sierra database objects after they sunset Permits Plus and migrate customer base to Accela Automation.
- IVR system 24 x 7 x 365 availability can be achieved with current levels of LCIS technical support; 24 x 7 DBA and programmer support will not be required.

## Other Constraints & Assumptions

### Constraints:

IVR might require approval by the Lane County Board of Commissioners and/or a grant funding agency.

## Known Risks

Risk Description	Probability (H/M/L)	Impact (H/M/L)	Assigned Owner	Mitigation
LMD Power Users unavailable to assist vendor during IVR design, implementation or training.	H	H	Jeff Towery	Division and project priorities will be reviewed and amended as appropriate.

**Known Risks**

<b>Risk Description</b>	<b>Probability (H/M/L)</b>	<b>Impact (H/M/L)</b>	<b>Assigned Owner</b>	<b>Mitigation</b>
Selected IVR vendor fails to perform or meet expectations according to contract or agreements.	L	H	Jeff Towery	Vendor is notified and appropriate resources are directed to ensure compliance.
Annual Permits Plus version upgrade requires same LCIS resources at the same time as IVR project.	M	H	Darrell Landrum	LCIS will provide detailed project planning for both projects to make maximum utilization of available resources; worst case: Permits Plus upgrade is postponed until resources become available
Accela's shift in focus from Permits Plus to their new product, Accela Automation, leaves LMD with an IVR interfaced to an unsupported permitting system.	M	H	Jeff Towery	Options, along with Division and project priorities, will be reviewed and amended and an appropriate course of action consistent with resources will be pursued.
IVR vendor support of the Permits Plus API ends. Rendering IVR useless.	M	H	Jeff Towery	Lane County develops its own Permits Plus API or procures one from another vendor.
LCIS requires discrete IVR database and application servers – at additional cost to LMD - to provide 24 x 7 operations of IVR system.	M	L	Darrell Landrum	LCIS will work with vendor to arrive at the best possible support scenario
Database Administrator resources not available for database server configuration and load testing due to commitment to concurrent high-priority projects	H	M	Darrell Landrum	LCIS will work with vendor and DBA resources to coordinate scheduling and contain project complexity
LCIS discovers technical issues with integration of IVR system into existing infrastructure.	L	M	Darrell Landrum	Vendor is notified; IVR implementation postponed until issues are resolved and LMD, LCIS and Vendor resources are again available to continue
Annual Permits Plus version upgrade requires same LMD resources at the same time as IVR project.	M	M	Jeff Towery	Division and project priorities will be reviewed and amended as appropriate.

**Project Charter Authorization Approvals**

Approval is required only by the persons listed in the table below. Once formally approved as a project, this document will be under change control, and managed through the change control process defined for this project.

Department	Name	★ Signed	Date
LMD Sanitation	George Ehlers		
LMD Planning	Kent Howe		
LMD Building	Tony West		
LMD	Jeff Towery		
LCOG Telephony	Dan Mulholland		
LCIS Tech Services	John Careccia		
LCIS RIS	Jim Dotson		
LCIS App Services	Scott Byler		
LCIS Web Services	Darrell Landrum		

**★ My approval indicates I understand all estimates were made in good faith, based on the best information available at the time this document was drafted. I understand future estimates may vary widely from those provided in this document, as more detailed requirements and resource needs are identified in the formal project planning process.**

*Lane County Economic Development Standing Committee*

**Section 5 – Project Performance Measures and Targets**

**Project Title: LMD Interactive Voice Response (IVR) Permitting System.**

**Narrative**

*Which Oregon Benchmark (Attachment C) does the output or outcome relate to?*

Land Management Division's implementation of an Interactive Voice Response (IVR) Permitting System is intended to diversify the means by which private and professional customers can effectively apply for and secure land use, building, and sanitation permits. The telephone and on-line services will directly address Bench Marks #9 and #10 at the local level.

- BM # 9 – Cost of Doing Business.
- BM # 10 – On-Time Permits.

The RFP included as Attachment "A" to Section 4 of this Proposal lists the following objectives for the IVR system which are designed to reduce time and expenses for the citizens to request information and permits, and expedite the processing of the permits after they have been applied for:

**Objectives**

- Secure, remote 24/7 telephone access to a variety of information pertaining to a permit: type of permit, job site address, name of applicant, date applied, current status, information or actions needed to continue application processing, next inspection required, next inspection scheduled, status of last inspection, fees owed, name of Lane County staff member currently responsible for processing the application, etc; and to conduct limited permit and inspection scheduling transactions.
- Customizable telephone user interface that provides clear, logical prompts that can be easily navigated by most callers; flexibility to customize search criteria accepted and information returned.
- Effective, reliable English language speech recognition in prompts with the possible addition of Spanish language speech recognition.
- Dynamic read and update access to the permitting application database via an application program interface (API).
- Delivery of static information and documents by means of voice broadcast or fax transmission.
- Secure, remote authorized and authenticated staff access to the permitting system database for updating permit records from the field.

- Capability to route LMD customers to the phone extension of the staff member currently processing the permit application.
- IVR application portable to other permitting systems.
- Administration by functional staff (power users).
- Customers can purchase simple permits.
- Automatically call customers for such reasons as reminders about overdue fees or permit near expiration.
- Enable customer scheduling of permit application review meetings.

*What is the project target for each output or outcome and when will results be reported?*

Based on the wide spread acceptance of IVR systems in other jurisdictions, LMD anticipates an immediate use (first 90 days) of the services beginning April 1, 2005, by approximately 25% of the building permit applicants. The increase in use of the LMD website is expected to climb to 40% within six months or September 1, 2005. Through a series of workshops between LMD staff and the professionals, it is anticipated the acceptance of the IVR option will reach 50% by the end of the initial year (April 1, 2006).

As new functions and applications are added to the catalog of available education and application materials, a larger benefit will be realized for the consultants and private property owners of Lane County.

For this particular proposal, "outcomes" can be portrayed as the "requirements" described on pages 3 through 7 of the RPF included as an attachment to Section 4 of this proposal. Please refer to the itemized breakdown of the required functions and services of the proposed IVR platform that are presented there. The overall anticipated outcome is to provide a much more accessible and efficient information and application process. That sweeping goal is articulated in the LC Information Services requirements to the IVR vendors.

LMD proposes to submit an initial status report upon implementation of the IVR permitting system (Implementation report: April 1, 2005).

LMD proposes to provide quarterly progress reports thereafter for interested parties from the date the system becomes operational and available to the public (First-quarter report: July 1, 2005).

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**Economic Development Strategic Investment Program  
RFP Combined Score Sheet - January 27, 2005**

Attachment D

Proposal Rating	Proposal Title / Organization	Amount Requested	Reviewer	Total Project Scores	EDSC Total Score	Average Score
#1	Interactive Voice Response (IVR) Permitting System / Lane County Land Mangement DivisionJH	\$80,000	Stewart	102	507	101.4
			Mackey	90		
			Forster	100		
			Dwyer	110		
			Gangle	105		
#2	The Planet Improvement Center / Bring Recycling (Request for \$150,000 awarded \$100,000)	\$100,000	Stewart	110	504	100.8
			Mackey	117		
			Forster	102		
			Dwyer	75		
			Gangle	100		
#3	Baxter Air Quality / Lane Regional Air Pollution Authority & Lane Metro Partnership	\$50,000	Stewart	80	339	67.8
			Mackey	71		
			Forster	75		
			Dwyer	40		
			Gangle	73		
#4	Business Development, California Recruitment Campaign / Chabin Concepts	\$53,600	Stewart	55	292	58.4
			Mackey	55		
			Forster	52		
			Dwyer	65		
			Gangle	65		
Total Funds Requested		\$283,600	N/A			





## Lane Metro Partnership

**FEB 04 REC'D**

The Honorable Anna Morrison, Chair  
Lane County Board of Commissioners  
125 E. 8<sup>th</sup> Avenue  
Eugene, OR 97408

February 4, 2005

Re: J. H Baxter Air Quality Testing

Dear Chair Morrison and Commissioners:

Although the Lane County Economic Development Standing Committee did not recommend our grant request to assist LRAPA with testing for J. H. Baxter, LRAPA has been able to conduct limited testing with the resources they have.

I am enclosing with this letter a copy of the results LRAPA has received on that testing. What is interesting is that, while they stress that "[n]ot many conclusions can be drawn from two 1-hour sampling events" and that they did not find any health risk, this screening does give them some information "about which HAP's are impacting the neighborhood and their relative concentrations."

That suggests to me that more testing might have helped the company and LRAPA develop a strategy for reducing the odors even if this is not a health hazard as such. Although our request was erroneously characterized as a "study" by the committee, it should be clear from this report that this testing is a valuable diagnostic tool that potentially offers a chance to resolve the problem to everyone's satisfaction, saving more than 60 family wage jobs while also protecting the quality of life in the neighborhood.

I am disappointed that Lane County did not regard this as a suitable program for funding.

Very truly yours,

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comparison. This comparison is also presented in Table 2.

LRAPA has operated an air toxics monitoring site at Amazon Park in south Eugene for almost three years. A few less chemicals are measured at the Amazon site, but it is a good reference for general population exposure to HAP's in the urban area. Since the Amazon measurements are 24-hour averages we have scaled the short term concentrations found in the JHB sampling to this averaging time for comparison. This data is presented in Table 2 along with the other reference comparisons.

### Conclusions

Not many conclusions can be drawn from two 1-hour sampling events. As far as neighborhood impacts from the JHB facility, no HAP's concentrations were found to be above established OSHA standards, or if extrapolated to long term exposures would be above EPA risk assessment Reference Concentrations (RfC's).

Mostly we have learned a little about which HAP's are impacting the neighborhood and their relative concentrations. We have found naphthalene, a chemical abundant in the creosote wood treating substance at levels several hundred times above the concentrations found in Amazon Park. Other common urban HAP's appear to be in line with those measured in Amazon Park.

We know we did not find some HAP's we expected to find which are used in the wood treating process, and have determined that our short term - low volume sampling technique did not allow us to collect the minimum detectable amounts required for analysis. We will adjust sampling methodology in the future to improve resolution of all chemicals.

**Table 1: Measured Concentrations**

Monitor Method	Compounds	06-Jan-05		12-Jan-05	
		Upwind (µg/m³)	Downwind (µg/m³)	Upwind (µg/m³)	Downwind (µg/m³)
TO-15	Acetone*	11.0	0.0	69.0	0.0
TO-13A	Bis(2-ethylhexyl)phthalate	21.7	0.0	0.0	7.6
TO-15	4-Ethyltoluene*	0.0	0.0	0.0	9.3
TO-13A	2-Methylnaphthalene*	0.0	3.5	0.0	7.5
TO-13A	Pentachlorophenol	0.0	0.0	0.0	0.0
TO-15	1,2,4-Trimethyl Benzene*	0.0	0.0	0.0	5.5
TO-15	Styrene	5.1	5.2	0.0	8.2

\* Compound not on EPA HAPs list.

**Table2: Downwind site comparison to standards**

Monitor Method	Compounds	OSHA / NIOSH Comparison		Amazon Park Comparison		EPA Chronic Ref Comparison	
		06-Jan-05 (µg/m³)	12-Jan-05 (µg/m³)	06-Jan-05 (µg/m³)*	12-Jan-05 (µg/m³)*	06-Jan-05 (µg/m³)*	12-Jan-05 (µg/m³)*
TO-15	Acetone	0.0	0.0	0.0	0.0	0.0	0.0
TO-13A	Bis(2-ethylhexyl)phthalate	0.0	0.0	0.0	0.0	0.0	0.0
TO-15	4-Ethyltoluene	0.0	9.3	0.0	3.7	0.0	0.4
TO-13A	2-Methylnaphthalene	3.5	7.5	1.4	3.0	0.3	0.6
TO-13A	Pentachlorophenol	0.0	0.0	0.0	0.0	0.0	0.0
TO-15	1,2,4-Trimethyl Benzene	0.0	5.5	0.0	2.2	0.0	0.4
TO-15	Styrene	5.1	5.2	2.1	3.3	0.4	0.7

\* Concentration averaging time factors taken from EPA guidance document, "Screening Procedures for Estimating the Air Quality Impact of Stationary Sources, Revised" where: 1 hr \* 0.4 = 24 hr (Amazon Park); 1 hr \* 0.08 = Annual (EPA Ref)