City of Stevenson Value Planning Project

Infrastructure NEXT Scope of Work

**Project Understanding**
The City of Stevenson’s wastewater treatment plant is overloaded, aging past its design life and occasionally violating its permit limitations on BOD and TSS. The city has put forward a plan that anticipates significant growth in some business sectors. If implemented, the plan would increase plant capacity significantly. The estimated project cost is $13-14M. With local businesses and residents concerned about the impact on rates, the City wants to look for alternatives that can address the issues and may offer more overall value for the community.

**Project Approach**
The Infrastructure NEXT team proposes to conduct an eight-week Value Planning process, designed to identify a portfolio of options that can help to solve Stevenson’s wastewater challenge, at the same or lower lifecycle cost while generating the same or greater long-term community value. This work will be undertaken in three stages:

- Advance Research
- Field Trip & Value Planning Workshop
- Strategy Report

**Value Planning Team**
The Infrastructure NEXT team for this project will consist of a Project Director who will be involved at every stage, a Lead Facilitator who will organize and conduct the workshop/charrette, and a Project Manager who will manage/organize personnel and provide support throughout. In addition, the team will draw upon the expertise of specialists in Integrated Design Strategies, Sustainable Water/Wastewater Systems, and Green Infrastructure. This work will be supported by up to two Graduate Interns and a Graphic Artist who will assist in the production of the report.

Our team members include:

**Rhys Roth, Project Director**
Rhys Roth is Director of the Center for Sustainable Infrastructure (CSI) at The Evergreen State College. The Center brings innovation, new tools, and sustainability excellence to infrastructure planning and investment in the Pacific Northwest. Rhys authored CSI’s influential inaugural report, *Infrastructure*
Crisis, Sustainable Solutions and the first and second 5 Big Goals for 2040 CSI reports, Rewiring the Northwest’s Energy Infrastructure and A Northwest Vision for 2040 Water Infrastructure. Prior to founding CSI, Rhys co-founded and helped lead for over 15 years the non-profit group Climate Solutions.

Andrea Ramage, Lead Facilitator

Andrea is founder and CEO of Somersault Consulting LLC, is a WA state-certified woman-owned business working with change-makers in civil infrastructure and environmental stewardship to imagine and realize their best futures. Andrea brings her 26+ years of experience to facilitate strategic planning and innovation for local governments and non-profits, advise on enterprise sustainability programs, and develop leaders’ skills in strategy and creative problem-solving.

Previously, Andrea worked for CH2M, a global engineering company. She led the company’s rise to industry leadership in sustainable solutions by developing a sustainability consulting practice, building the firm’s internal capacity across multiple business units, and serving clients in sectors ranging from aerospace, global agricultural development, and mining to food manufacture, water/wastewater treatment, and urban redevelopment. Andrea holds a B.S. in Civil Engineering from Princeton University and an M.S. in Geotechnical Engineering from Virginia Tech.

Steve Moddemeyer, Integrated Design Strategies

Steve Moddemeyer is a Principal with CollinsWoerman. With nearly 25 years of experience, Steve specializes in creating tools and policies to develop resilient infrastructure and land use systems for neighborhoods, cities and new town developments. Steve’s practice includes master planning for large urban redevelopments; resilience planning for urban infrastructure systems including roads, water, and energy; developing urban policy for climate change adaptation; and advising cities, utilities, and Tribes on techniques and tools for advanced sustainability. Steve is a member of the National Academy of Sciences’ Resilient America Roundtable. Selected Project Experience:

- Fones Road Value Planning Charrette
- Osage Nation Master Plan + Space Utilization Study
- Resilient Design Performance Standard for Infrastructure and Associated Buildings
- Sustainable Living Innovations
- Swedish Medical Center
- Yesler Terrace
- Yesler Terrace Sustainable District Study

Troy Vassos (PhD, FEC, PEng), Sustainable Water/Wastewater Systems

Troy is Technical Director & Senior Environmental Engineer for Integrated Sustainability Consultants Ltd., and an Adjunct Professor in Department of Civil Engineering at the University of British Columbia. Troy has a Ph.D. in environmental engineering with over 39 years of experience in industrial and municipal water and wastewater treatment process design, regulatory and standards development, technology performance verification, operations support and optimization and effluent disposal and reuse. He is also an expert and advisor in the area of integrated water management including water conservation; stormwater management; rainwater harvesting; and water reclamation. Other areas of
expertise include biomass to energy, composting, environmental & public health assessment, and environmental forensics.

Dr. Vassos is active in numerous provincial, national, and international technical and professional organizations, committees, and advisory boards including the serving: Canadian Standards Association, Canada Mortgage and Housing Corporation, Health Canada; National Research Council, the Natural Sciences and Engineering Research Council; Standards Council of Canada; International Code Council; and the International Standards Organization. He is also a member of the Association of Professional Engineers and Geoscientists of BC and Alberta. Troy was responsible for drafting and finalizing CSA B128.3 - Performance of Residential Non-potable Water Treatment Systems, advisor to Health Canada in the development of the "Canadian Guidelines for Domestic Reclaimed Water for Use in Toilet and Urinal Flushing"; and chaired the IAPMO Z1207 Small-Scale Greywater Conservation Systems subcommittee, has provided regulatory assistance to British Columbia, Alberta, and Australian EPA regarding water reclamation and reuse, and is a technical content expert on the ISO/TC 282 Water Reuse standard development committee, and joint CSA/ICC Rainwater Harvesting standard committee.

Carrie Sanneman, Green Infrastructure

Carrie Sanneman is Willamette Partnership’s Clean Water Program Manager. She leads on green infrastructure for water and is an expert in market- and incentive-based approaches to conservation. Carrie’s career has revolved around conservation and restoration: the laws and policies that drive resource management; the tools to evaluate and communicate the benefits nature provides; the options for funding and financing that work; and, the realities of moving dirt and planting plants. She manages the Ecosystem Credit Accounting System, which can be used to generate compliance-grade credits from high-quality restoration projects. She is also a lead and co-facilitator for local, regional, and national processes to engage stakeholders around building cost-effective, multi-benefit, nature-based solutions to cleaner water.

Carrie holds an interdisciplinary Master of Environmental Science and Management from the University of California Santa Barbara’s Bren School and a Bachelor of Science in Biology and Environmental Studies from Iowa State University.

Terry Carroll, Project Manager

Operations Manager for the Center for Sustainable Infrastructure, Terry has worked with the Center since 2015. He has played a supporting role on several Infrastructure NEXT projects and in producing both installments of the 5 Big Goals for 2040 series of sustainable infrastructure research reports. His background includes a degree in Molecular Biology from the University of Washington and a Master of Environmental Studies degree from the Evergreen State College. He has interned with the Dept. of Ecology's Water Quality section, has served in a managerial position at several small businesses, and worked as a lab technician at the University of Washington Dept. of Biology.
Scope of Work

Task 1: Advance Research

Purpose
The research phase of this project will lay important groundwork for the Value Planning Workshop and Strategy Report to be developed through tasks 2 and 3.

Approach
A series of meetings will ensure the Infrastructure NEXT and subject matter experts will align these subsequent phases with the priorities and desires of the City of Stevenson and other stakeholders. These meetings include:

1. **Kickoff Meeting:** 1-hour long meeting with the Project Team and the City's key project members. to review the scope, schedule, budget, team, and request background materials to be attended by Project Director, Project Manager, Lead Facilitator, and subject matter experts.

2. **Research and Review:** Informational research and review will be completed to develop draft problem statements and a portfolio of potential solutions.

3. **Progress Meetings:** Project Director & Manager, Lead Facilitator, and Integrated Design expert will hold two 1-hour meetings via phone with City officials to discuss key findings from literature review.

Deliverables:
- Kickoff Meeting Notes
- Draft Problem Statements
- Portfolio of Potential Solutions to be explored in Task 2
- Key Findings Presented at the Update Meeting

Task 2: Field Trip & Value Planning Workshop

Purpose
The goal of the value planning workshop is to engage key community stakeholders in shaping and developing a plausible and prioritized portfolio of options to solve the Stevenson wastewater treatment plant issue.

Approach
This task will include the following activities:

1. **Workshop Preparation and Logistics:** Our team will prepare the workshop agenda, develop supporting materials (advance materials and meeting materials), create presentation materials,
coordinate meeting room logistics and equipment with City staff, and assist the City in coordinating stakeholder invitations/communications in advance of workshop.

2. **Field Trip (afternoon):** The day before the workshop, our team will spend the afternoon touring the City of Stevenson to better understand the context. Team will plan on staying overnight.

3. **Day of Workshop (full day):** Our team will facilitate and participate in developing, and building the portfolio of plausible, prioritized solutions to the WWTP issue. We anticipate that the workshop will include 15-20 people in addition to the CSI/Infrastructure NEXT team.

**Deliverable:**

- Workshop Agenda and Facilitation Approach, including materials

**Task 3: Strategy Report**

**Purpose**

The purpose of this final task is to conduct further analysis, incorporate client input, and package the portfolio of plausible solutions and options into a final Strategy Report.

**Approach**

Producing a final strategy report will involve:

1. **Strategy Development:** Experts will conduct further analysis to test, refine, and quantify the top strategies developed in the workshop. Their goal will be to develop a recommended portfolio of solutions. The Strategy Report will summarize the workshop findings and recommendations. Integrated Design expert, Steve Moddemeyer will be the lead author with Green Infrastructure and Sustainable Water/Wastewater experts, Carrie Sanneman and Troy Vassos serving as prime contributors.

2. **Strategy Review Meeting:** Project Director & Manager, Lead Facilitator, and subject matter experts will hold a 90-minute call to present the draft Strategy Report to the City of Stevenson project team.

*Finalize the Report:* Project Director & Manager will work with subject matter experts to finalize the report based on client’s input.

**Deliverable:**

- Strategy Report, delivered electronically.

**Assumptions**

*Field Trip:* One or more City project team members will be available to guide our team through an afternoon field trip to selected locations.
**Workshop Venue:** The City of Stevenson will arrange a suitable meeting room with movable tables and chairs, lots of open wall space for hanging flip charts and other materials, a projector and screen for showing slides, 4 new flip charts and markers in different colors, 20 pads of 3”x6” Post-It notes, a dark Sharpie pen or marker for each attendee, name tags, and other equipment and materials. Morning/afternoon snacks and lunch will also be provided by the City on the day of the workshop.

**Travel:** The value planning workshop will be held in Stevenson, WA. The team will take the most economical forms of travel to minimize mileage and/or airfare charges.

**Printing:** All done by the City of Stevenson, in color or in black and white, as needed.

**Lodging:** Best Western Plus, Columbia River $125/night including tax) x 1 night x 8 people, or equivalent.

**Parking:** No fee assumed; charged at-cost if it applies.

**Meals:** Dinner on each of the Field Trip and Workshop days; Breakfast and Lunch provided by hosts on the day of the Workshop. Dinner costs assumed at $30/person x 8 people.

**Schedule**

We propose that the tasks outlined above be completed over the course of an 8- to 10-week schedule, as outlined below.
**Compensation**

The proposed budget for the scope of work outlined above is $57,280 on a not-to-exceed, time-and-materials basis. This budget does not include our Project Director’s time or 33% of our Green Infrastructure expert’s time, amounting to an additional $9,620, which is covered by the EDA grant.

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<th>TASKS:</th>
<th>Hours</th>
<th>Expenses*</th>
<th>Task Totals</th>
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<td><strong>TASK 3: Strategy Report</strong></td>
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* Expenses include mileage, airfare, lodging, and meals, charged at-cost with no markup.

Hourly rates for each team member are as follows:

- Project Director- $150/hour
- Integrated Design Strategies Expert - $225/hour
- Sustainable Water/Wastewater Systems Expert - $175/hour
- Green Infrastructure Expert - $125/hour
- Lead Facilitator - $175/hour
- Project Manager - $70/hour
- Graphic Artist - $100/hour
- Interns - $14/hour (at-cost)