

## Addendum One / RFP 11-1850

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### **Metro Pioneer Cemeteries: Operations and Market Assessment, Business Plan Recommendations and Financial Pro Forma**

The following questions and subsequent answers were submitted on this solicitation. In the interest of fairness, this information is being provided to all interested proposers.

Q: On page 2 you reference additional considerations; we assume this is all work being conducted by others and that we are not required to collaborate on this work; however, we will be expected to consider this work in our analysis and assessment – correct?

A: The work is being done by others at Metro or by another consultant.

Q: On page 4 you note one of our research/analysis tasks to identify state and local policy and provide options for changes – please clarify if there are specific policies you would like reviewed or if this is to be a complete and exhaustive analysis of the current policies?

A: Currently ORS 97.630 ORS 97.870 to ORS 97.920 in regard to disposition of unused & abandoned grave plots is unclear and cumbersome. Metro is looking for similar laws and conventions in other states with regard to the disposition of unused graves. In addition Metro is interested to know of other states revised statutes for public cemeteries with regard to perpetual care funding.

Q: On page 5 you note one of our research/analysis tasks to research ongoing public roles – are you looking for public group options that can be organized in support of the cemetery (i.e.: “friends of” organizations, heritage foundations, etc.)?

A: Yes, friends groups, foundations and partnerships including but not limited to other cemeteries, heritage groups but also environmental conservation groups. Also, Metro’s role as a municipal operator in a tri-county metropolitan area. Please note Metro has a road map in creating a cemetery district and will provide this information upon award, however Metro would be interested in any further information that the consultant may be able to provide with regard to other municipal cemetery programs that are in similar size to Metro’s.

Q: On page 5, part of Task 2 you ask for a comprehensive evaluation of Metro’s physical conditions and capital needs, however further in the RFP you note we should focus on providing big picture information and broad forecasts – can you please clarify the level of detail required for the evaluation as this seems contradictory?

A: Metro is looking for similar documentation as found in Appendix C [ftp://ftp.oregonmetro.gov/dist/parks/RFP\\_11-1850/](ftp://ftp.oregonmetro.gov/dist/parks/RFP_11-1850/) Whereas Metro has a list of liabilities for Lone Fir Cemetery, Metro does not have a deferred maintenance/capital improvement list for the rest of Metro’s cemetery program. In addition Metro is also looking for suggested capital improvements that will enhance the cemetery program.

Q: On page 6 you ask us to identify historic resources – should we be required to provide a historical resource consultant to review each cemetery, in detail, or will you provide this information?

A: Metro has historical information for each of its cemeteries and upon award Metro will provide information to the consultant to use for the scope of work. To clarify Metro is looking for ways to incorporate the historical nature of these properties in its business plan.

Q: On page 6 you note the cost proposal is anticipated to be \$40,000, however you ask for a detailed cost proposal from us. Is the fee limited to \$40,000? Are you looking for a breakdown of our proposal per scope/task items? Please clarify any additional cost information that shall be submitted and required format.

A: Metro's budget is \$40,000 for this project. Metro is looking for the proposer to provide a breakdown per task items. This includes; hourly rates, cost of materials and supplies, professional service contracts, travel, overhead (if applicable), and any other miscellaneous costs.

Q: On page 7 you note our deliverables to include cost estimates, renderings, conceptual layout plans, and phasing plans, however you also note on page 5 that complete cemetery landscape redesigns are not needed. Can you clarify what is needed and to what depth regarding each of these noted items? We are under the impression this is a business planning exercise not a cemetery planning/design exercise – please clarify. Similarly, you note that map and graphics are to be presented on May 9-13 – please clarify.

A: The purpose of this plan is to inform the Metro Council in the future operations of its cemetery program. A part of that plan will include an array of site improvements coupled with return on investment information. Metro is looking for broad brush site improvements such as installation of niche walls, scatter gardens, donor benches, green burial sections as well as providing a list of deferred maintenance. The plan will inform the Council of Metro's liabilities and opportunities for the program. Complete cemetery redesigns are not needed, however broad brush conceptual designs and proposed phasing plans are being requested. There may be some cemeteries that offer higher opportunities for ROI versus other cemeteries that are not suitable for investments.

Q: On page 8 you note that we can submit via mail or email, however you are requiring us to submit six copies – please clarify our options. We would like to maintain the sustainable direction of Metro and submit via email, but not sure that will be acceptable.

A: You may either deliver 6 printed copies of the document to Metro or simply email the document electronically. Either is acceptable.

All other terms and conditions of the original RFP remain in full force.

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