



CITY OF OREGON CITY URBAN RENEWAL COMMISSION - REVISED AGENDA

Commission Chambers, Libke Public Safety Facility, 1234 Linn Ave, Oregon City
Wednesday, July 17, 2024 at 6:00 PM

Ways to participate in this public meeting:

- Attend in person, location listed above. Please see the public comment guidelines below.
 - Register to provide electronic testimony (email recorderteam@orc.org or call 503-496-1509 by 3:00 PM on the day of the meeting to register)
 - Email recorderteam@orc.org (deadline to submit written testimony via email is 3:00 PM on the day of the meeting)
 - Mail to City of Oregon City, Attn: City Recorder, P.O. Box 3040, Oregon City, OR 97045
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1. CALL TO ORDER AND ROLL CALL

2. PUBLIC COMMENTS

Please see the public comment guidelines below.

3. DISCUSSION ITEMS

- 3.a. Stimson Property Geotechnical Report
- 3.b. Stimson Property – Appraiser Review and Recommendation
- 3.c. Minutes of the June 05, 2024 Urban Renewal Commission Meeting

4. COMMUNICATIONS

5. ADJOURNMENT

PUBLIC COMMENT GUIDELINES

Complete a Comment Card prior to the meeting and submit it to the clerk. When the Chair calls your name, proceed to the speaker table, and state your name and city of residence. Each speaker is given 3 minutes to speak. As a general practice, the committee does not engage in discussion with those making comments. Complaints shall be addressed at the department level prior to addressing the committee.

ADA NOTICE

The location is ADA accessible. Hearing devices may be requested from the City Recorder prior to the meeting. Individuals requiring other assistance must make their request known 48 hours preceding the meeting by contacting the City Recorder's Office at 503-657-0891.

Agenda Posted at City Hall, Pioneer Community Center, Library, City Website.

Video Streaming & Broadcasts: The meeting is streamed live on the [Oregon City's website](https://www.oregoncity.org) and available on demand following the meeting. The meeting can be viewed on Willamette Falls Television channel 28 for Oregon City area residents as a rebroadcast. Please contact WPMC at 503-650-0275 for a programming schedule.



CITY OF OREGON CITY

625 Center Street
Oregon City, OR 97045
503-657-0891

Staff Report

To:	Urban Renewal Commission	Agenda Date:	July 17, 2024
From:	John Lewis, Public Works Director		

SUBJECT:

Item 3.a. - Stimson Property Geotechnical Report

STAFF RECOMMENDATION:

The Commission receives an informational presentation on the Geotechnical report prepared for 1975 Washington Street (PS 23-018).

EXECUTIVE SUMMARY:

This is a review of the June 7th Geotechnical Services Report prepared by Pali Consulting.

BACKGROUND:

In September 2023, the City Manager requested the Public Works Engineering Division's assistance in producing a report on the current site conditions for 1795 Washington Street. This report would inform the Urban Renewal Agency (URA) on the current conditions of the site for consideration of future development proposals for the site. Staff contacted geotechnical engineering firms (on the City's list of approved consultants) and requested the firms provide a scope, and fee, to research the past land uses, analysis of site soils, and preparation of a report detailing the existing conditions for this site.

Following City and state procurement standards, an informal request for proposals was sent to four (4) geotechnical consultants. On February 21, 2024, the Urban Renewal Agency authorized a contract with Pali Consulting, Inc. to complete this work.

Pali Consulting completed fieldwork April 8–10, 2024, consisting of five mud rotary borings. Soil samples were collected, and a vibrating wire piezometer was installed. On June 7, 2024, Pali Consulting completed their report and submitted the report of their geotechnical findings. The attached report includes project background, site conditions, engineering analysis conclusions, structural design recommendations, and earthwork recommendations.

OPTIONS:

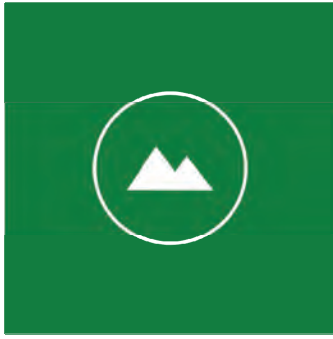
1. N/A

BUDGET IMPACT:

Amount N/A

Fiscal Year(s):

Funding Source(s):



Pali Consulting

June 7, 2024

City of Oregon City
Urban Renewal Commission
13895 Fir Street
Oregon City, Oregon 97045

Report of Geotechnical Services

1795 Washington Street
Oregon City, Oregon
P082-23-004

1.0 INTRODUCTION AND SCOPE OF SERVICES

Pali Consulting, Inc. (Pali Consulting) presents this report of geotechnical services for commercial development proposed at the above address. The City of Oregon City (City) wishes to sell the subject property for the purpose of commercial development and has requested that we provide a geotechnical analysis of the site including a summary of geologic hazards, subsurface conditions, and preliminary geotechnical design recommendations appropriate for commercial development. Final development is not yet known, but multi-story hotels and related elements are anticipated at this time.

Our scope of work included a review of existing background information, conducting a program of subsurface explorations, completing laboratory testing on select soil samples, installation and future monitoring of a vibrating wire piezometer, evaluating our preliminary findings and preparing this report. This report provides preliminary geotechnical design information which may be used by appropriate parties in their evaluation of the site. Additional geotechnical investigation and design are contemplated with this project, and as such, the recommendations contained within this report should be considered preliminary information and not be used for final design. Our work was completed in general accordance with our agreement with you dated February 21, 2024. The location of the site is shown on Figure 1, and the site layout is shown on Figure 2.



2.0 BACKGROUND REVIEW

2.1 GEOLOGY AND GEOLOGIC HAZARDS

2.1.1 *Geology*

The geology in the area is mapped on the Oregon Department of Geology and Mineral Industries' (DOGAMI) website, accessed April 2024. The website shows that the majority of the site is underlain by Quaternary Alluvium (Qal), with the northeast corner underlain by Quaternary Artificial Fill (Qaf). The Alluvium is described as mixed grained sediments. The Artificial Fill is not further described.

We reviewed well logs near the site on the Oregon Water Resources Department website (https://apps.wrd.state.or.us/apps/gw/well_log/, accessed April 2024). Three well logs in close proximity to the site generally found silt to about 25 feet below ground surface (bgs), underlain by silty sand to about 35 feet bgs, underlain by gravel and cobbles. Groundwater was encountered at 26 feet in one of the borings, and was not recorded in the others.

2.1.2 *Geologic Hazards*

Geologic hazards were accessed and reviewed on the Oregon City WebMaps website (https://maps.orcity.org/Html5Viewer_4_14_2/index.html?viewer=OCWebMaps.OCWebMaps, accessed April 2024) and on DOGAMI's HAZVU statewide geohazards viewer (<https://gis.dogami.oregon.gov/maps/hazvu/>, accessed April 2024). We found the following regarding hazards mapped at the site:

- Subject to very strong shaking from Cascadia and local earthquakes.
- Within the FEMA 100-year floodplain.
- Nearest active faults are the Oatfield Fault, located about 1 mile to the east, and the Bolton Fault, located about 1 mile to the west. Both the Oatfield Fault and the Bolton Fault have a reverse sense of movement and a slip rate of less than 0.2 mm per year.
- No landslide potential and no landslides mapped adjacent the site.
- High mapped soil liquefaction susceptibility.

2.2 GROUNDWATER MAPPING

We reviewed groundwater mapping of the area completed by the United States Geological Survey (USGS) website (https://or.water.usgs.gov/projs_dir/puz/index.html, accessed April 2024). The mapping shows estimated depths to regional groundwater of about 20 feet bgs.

2.3 LIDAR TOPOGRAPHY

We reviewed LiDAR-generated hillshade mapping of the site using publicly available data from the DOGAMI LiDAR viewer. The mapping shows the site to be located on flat ground adjacent the confluence of the Clackamas and Willamette Rivers. A ditch runs along the northeast boundary of the site, separating the property from the adjacent access road (also evaluated in this report).

2.4 AERIAL PHOTOGRAPHY

We reviewed historic aerial photographs from the years 1994 through 2024 available on Google Earth Pro®, and from the years 1952, 1960, 1970, and 1980 available through USGS Earth Explorer.



Our review of the aerial photographs found that the site was farmland or open space at the time of the earliest air photo in 1952. In this photo, the parcel appears flat and cleared of trees, and a building is present near the west end of the site. Between 1960 and 1980, air photos show the site in active use as a lumber mill, with stacked logs, machinery, and multiple small structures present throughout the property. At the time of the next air photos in 1994 and 2000, the site appears cleared and to not be in active use. From the 2001 air photo through present, photos show the site to be in much the same configuration as present, with stockpiles of landscaping supplies associated with the Clackamas Landscape Supply business. No significant slopes are visible in the photos.

3.0 SITE CONDITIONS

3.1 SURFACE CONDITIONS

The site is comprised of a roughly arrow-shaped parcel as well as part of an access road that runs between Washington Street and the eastern property boundary. The railroad alignment runs adjacent to the parcel on the northwest and an Amtrak platform and the historic Southern Pacific Depot Building border the property to the southwest. The site is currently occupied by Clackamas Landscape Supply and development includes temporary trailers, a small prefab office building, and temporary structures such as eco-block walls and a truck scale. The lot is currently surfaced mostly in gravel with areas of asphaltic concrete (AC) pavement.

3.2 SUBSURFACE CONDITIONS

We completed five mud rotary borings within the subject parcel and adjacent right-of-way. The explorations were completed between April 8th and April 10th, 2024, at the approximate locations shown on Figure 2. A vibrating wire piezometer was installed in Boring B-2. A description of our subsurface exploration program, piezometer installation, and laboratory testing are included in Appendix A. Our explorations generally encountered fill overlying fine grained, high plasticity soils overlying a sand and gravel layer which was followed by weathered mudstone bedrock.

The subsurface conditions are described in more detail below.

3.2.1 *Gravel and Bark Dust Fill*

The portions of the site within Clackamas Landscape Supply boundaries (Borings B-1 through B-4) are generally underlain by approximately 1 to 7 feet of silty gravel which we interpreted as fill. In Borings B-1, B-2, and B-4, this Gravel Fill was underlain by an additional 6 to 9 feet (to a depth of 10 feet bgs) of reddish-brown bark dust, which we interpret as related to lumber milling activities at the site.

Laboratory testing found a moisture content of 40 percent in one sample of the Gravel Fill, and moisture contents ranging from 160 to 182 percent in the Bark Dust Fill. The Bark Dust Fill is almost entirely made up of organic material.

3.2.2 *Plastic Silts and Clays*

Below the fill at Borings B-1 through B-4, and from the surface at B-5, we encountered native silt and clay that extended to between 30 and 35 feet below ground surface (bgs). This native soil was primarily grey but graded to grey with black and brown mottling, and was moist to wet. Mottling of the soils was generally noted to begin between 20 and 30 feet bgs, and continued to the base of the formation. The silts and clays varied from very soft to stiff, with generally decreasing stiffness with depth, based on N-values that ranged from 0 to 15 in the borings completed, with an average of 3.



Laboratory testing found moisture contents ranging from 37 to 59 percent. The plasticity of the clay and silt was interpreted as high, based on Atterberg limits testing, which measured plasticity indices of 19 to 37 resulting in USCS classifications of MH to CH. The clay and silt contained varying amounts of sand ranging from 1 to 26 percent in the samples tested.

3.2.3 Sandy Silt and Silty Sand (Borings B-2, B-4, and B-5)

Below the Plastic Silts and Clays, we encountered a layer of silty sand and/or sandy silt which extended to 35 feet bgs in B-4 and B-5, and from 40 to 45 feet bgs in B-2 (below the Sand and Gravel unit described below). It was brown to greyish brown in color, moist to wet, and very soft to medium dense, with N-values of 0 in the sandy silt (B-5) and 14 in the silty sand (B-2). No SPT samples were taken in the silty sand (B-4), but pressures to push a Shelby tube sampler in the material ranged from 100 to 200 psi.

Laboratory testing found moisture contents ranging from 46 to 59 percent, with higher moisture contents associated with samples that contained a greater amount of fines. Fines content testing found 74 percent fines in the sandy silt and 46 percent fines in the silty sand. Atterberg limits testing of two samples of the sandy silt found it to be non plastic.

3.2.4 Sand and Gravel

Below the Plastic Silts and Clays (B-1 through B-3) or Sandy Clays and Silty Sands (B-4 and B-5) we encountered a layer of silty sand and/or gravel which extended to between 45 and 51.5 feet bgs. The sand and gravel was grey to brown in color, moist to wet, dense to very dense, with N-values ranging from 34 to >100 (refusal).

Laboratory testing found moisture contents ranging from 10 to 47 percent, with higher moisture contents associated with samples that contained a greater amount of fines. Fines content testing of one sample of the Sand and Gravel found a fines content of 11 percent.

3.2.5 Weathered Troutdale Formation Mudstone (Borings B-2, B-4, and B-5)

Below the Sand and Gravel in Borings B-1 through B-3, and the Sandy Silt/Silty Sand in Borings B-2, -4, and -5, we encountered moist, grey to blue-grey silts and clays that we interpret as highly weathered Troutdale Formation Mudstone. The Weathered Mudstone extended to 66.5 feet, our maximum depth of explorations. It varied from very stiff to hard, based on N-values that ranged from 25 to 63 in the borings completed, with an average of 41.

An Atterberg Limits test of one sample of the Weathered Mudstone found a plasticity index of 32, resulting in a USCS classifications of CH.

3.2.6 Groundwater

Groundwater was not directly observed in our borings due to mud rotary drilling methods used. However, our first groundwater reading from the piezometer we installed in Boring B-2, measured water at a depth of approximately 21.5 feet bgs.

Based on our groundwater reading, USGS regional groundwater mapping, local water well logs, NRCS soil descriptions, soil mottling we observed, and moisture content determined in our laboratory tests, we estimate that seasonal high groundwater is likely to occur within about 20 feet of the ground surface.

We note that groundwater elevations can vary from those interpreted due to the time of year, precipitation, and other factors.



4.0 ENGINEERING ANALYSES

Primary geotechnical factors for development at the site include settlement related to replacement of deep unsuitable fills at the site (primarily organics), and seismic hazards. Our analyses of these factors are provided in the following sections.

4.1 STATIC SETTLEMENT

As described in Section 3, the site is underlain by variable weak and compressible soils. Uncontrolled fill is present over most of the site which includes thick sections of Bark Dust Fill. Such fill is highly compressible and not suitable for construction. Below the fill the site is blanketed with plastic silts and fat clays that are very soft and prone to settlement from static loads. Settlement of fine-grained and organic soils, occurs slowly, over months to years. These soils undergo both immediate settlement and consolidation settlement. Immediate settlement happens during construction, but consolidation settlement continues after construction is complete. Consolidation settlement can include both primary and secondary settlement. Primary settlement is from dissipation of excess pore water pressure and depends both on soil characteristics as well as the drainage path that the water must follow. Secondary consolidation is due to deformation of individual soil grains over long periods of time and can occur for many years, particularly in organic soils.

We estimated settlement at the site under two likely cases:

Case 1: Removal of unsuitable fill and replacement with structural fill to depths of about 10 feet bgs.

Case 2: Addition of fill above current grades associated with general site development.

To estimate settlement in these cases we used Terzaghi's one-dimensional consolidation theory, soil thicknesses based on our boring logs, and consolidation parameters developed from the consolidation tests in Appendix A. Our analyses resulted in the estimated settlements for Cases 1 and 2, above, as noted in Table 1.

Table 1. Estimated Fill Settlement

Case	Settlement		Notes
	Primary	Secondary	
Case 1	6 to 8 inches	1 to 2 inches	Loading based on estimated net increase in pressure from fill replacement.
Case 2	1 inch/foot of fill	<1/2 inch	Settlement per foot of fill above existing site grades.

4.2 SEISMIC HAZARDS

The project site is in a seismically active area, and the primary mapped geologic hazards are seismic hazards, as noted in Section 2.1 of this report. Our reviews of these hazards are provided in the following sections, where we describe seismic sources at the site, identify the seismic basis of design, provide the code-based seismic response spectra, and outline our interpretation of seismic hazards at the site.

4.2.1 Seismic Sources

The seismicity of the region is controlled by the Cascadia Subduction Zone (CSZ). Plate tectonics cause the oceanic Juan de Fuca Plate to subduct beneath the continental North American Plate. Three types of earthquakes are associated with subduction zones: intraslab, interface, and crustal earthquakes. Contributions from each of these sources to the total site seismic hazard was evaluated using the National Seismic Hazard Mapping Project website (USGS 2016). The contribution of each was evaluated using the USGS interactive deaggregations for a hazard level corresponding to a probability of exceedance of 2



percent in 50 years for the maximum considered earthquake (MCE_R) (2,475-year return period). For response spectra at the site, we used the U.S. Seismic Design Mapping Tool (USGS 2018).

Interface Seismic Sources – Subduction zones are typically characterized by interactions between the oceanic Juan de Fuca Plate and the continental North American Plate. As the oceanic plate subducts beneath the continental plate, the two lock together. As they lock together, stresses build in the overlying continental plate. When the stresses become too large, the plate can rupture resulting in an interface earthquake. An example of an interface earthquake is the moment magnitude 9.0 (M9.0) event which occurred in 2011 in Tohoku, Japan. Interface earthquakes are some of the largest magnitude and most destructive earthquakes recorded across the globe.

Intraslab Seismic Sources – Intraslab earthquakes originate from a deeper zone of seismicity that is associated with bending and breaking of the subducting oceanic plate. Intraslab earthquakes occur at depths of 40 to 70 kilometers (km) and can produce earthquakes with magnitudes up to and greater than magnitude M7.0. An example of an intraslab earthquake is the 2001 M7.0 Nisqually earthquake which occurred in west central Washington. Our review of the interactive deaggregations indicate interface and intraslab earthquakes contribute approximately 76 percent of the total seismic hazard to the site.

Crustal Sources – Shallow crustal faults are caused by cracking of the continental crust resulting from the stress that builds as the subduction zone plates remain locked together. Based on our review of available geologic maps (through DOGAMI HazVu), the closest mapped faults to the site are the Oatfield Fault, located about 1 mile to the east, and the Bolton Fault, located about 1 mile to the west. Our review of the interactive deaggregations indicate crustal earthquakes contribute approximately 19 percent of the total seismic hazard to the site.

4.2.2 SEISMIC SHAKING

The anticipated peak bedrock acceleration having a 5 percent probability of exceedance in 50 years (MCE_R event) is 0.375g. The Maximum Considered Earthquake Geometric Mean PGA (PGA_M), which accounts for ground motion amplification due to site-specific effects, is 0.544. The PGA_M was determined by applying a site class factor for **Site Class E** to the peak bedrock acceleration. Refer to Section 4.2.3 – Seismic Site Class for further information pertaining to ground motion amplification at the site and appropriate site class.

4.2.3 SEISMIC SITE CLASS

Thick sequences of unconsolidated, soft sediments typically amplify the shaking of long-period ground motions, such as those associated with subduction zone earthquakes; whereas areas underlain by shallow soil profiles are not likely to amplify seismic waves.

The “site class” is a classification used by the 2021 International Building Code (IBC) (ICC 2021) and the 2022 Oregon Structural Specialty Code (OSSC) to quantify ground motion amplification. The classification is based on the properties of the upper 100 feet of the soil and bedrock materials at a site.

The deepest exploration performed at the site was approximately 66 feet bgs, and the SPT N-value obtained at the bottom of the exploration was extrapolated down to 100 feet in order to obtain a site class designation. Due to the presence of more than 10 feet of soft clay, we consider a **Site Class E** to be an appropriate designation for the majority of the site. However, **Site Class F** should be used due to the presence of liquefiable soils underlying the northern half of the site (borings B-2, B-4, and B-5).

Depending on the proposed development, if the proposed structures have a fundamental period of less than 0.5 seconds, **Site Class E** may be allowed per the IBC code for the site in general. We should be contacted to re-evaluate our recommendations as a part of final design.



4.2.4 LIQUEFACTION

Liquefaction is caused by a rapid increase in pore water pressure that reduces the effective stress of soil, resulting in a sudden loss in soil shear strength. Granular soils, which rely on interparticle friction for strength, are susceptible to liquefaction until the excess pore pressures can dissipate. Sand boils and flows observed at the ground surface after an earthquake are the result of excess pore pressures dissipating upwards, carrying soil particles with the draining water. In general, loose, saturated sand soils with low silt and clay contents are the most susceptible to liquefaction. Silty soils with low plasticity are moderately susceptible to liquefaction under relatively higher levels of ground shaking. For any soil type, the soil must be saturated for liquefaction to occur.

We note that strength loss can be expected in high plasticity, clay-like soils and is typically termed “cyclic softening.” Cyclic softening of clay-like soils typically means strength loss; however, unlike liquefied sand soils, cyclic softened clay-like soils do not typically manifest as large a magnitude of settlement as sandy soils.

We performed a site-specific liquefaction hazard analysis to evaluate the liquefaction susceptibility of the silt soils. The analysis defines the liquefaction susceptibility of fine-grained soils using methods outlined by Bray and Sancio (2006). Based on Bray and Sancio (2006), fine-grained soil deposits are generally vulnerable to liquefaction if the ratio of the in-situ moisture content (MC) and liquid limit (LL) (i.e., MC/LL) is greater than 85 percent and if the plasticity index (PI) is less than 12 percent. They note that fine-grained soils are only moderately susceptible to liquefaction if MC/LL is greater than 80 percent and the PI ranges between 12 percent and 18 percent. Further, soils having a PI greater than 18 percent are generally not considered susceptible to liquefaction because of their relatively high clay content.

Based on our laboratory test results, PI of the onsite soils is generally above 18 percent, thus based on the criteria delineated in Bray and Sancio (2006), we interpret the majority of the fine-grained soils to not be susceptible to liquefaction, we do however expect cyclic-softening in the soft high-plasticity soils. The loose to medium dense/very soft to soft layer encountered on the northern half of the site between 30 and 35 feet in B-2, 30 to 35 feet in B-4, and 25 to 35 feet in B-5 is non-plastic and thus is expected to undergo liquefaction. Based on the thickness of the layer, depth of the soil, and fines contents, we anticipate that seismic settlement will be less than 1 inch, however the variable depth and thickness will likely lead to differential settlement of up to the total settlement amount.

4.2.5 EARTHQUAKE-INDUCED LANDSLIDING AND LATERAL SPREADING

Based on the relatively gentle slope gradients across the site and surrounding areas, as well as the observed subsurface conditions, it is our opinion the potential for earthquake-induced landsliding, and lateral spreading is relatively low to negligible.

4.2.6 CODE-BASED SEISMIC DESIGN

We understand that seismic design will be in accordance with the 2022 OSSC. We obtained the seismic hazard from the National Seismic Hazard Maps (USGS 2014) for Latitude 45.3689 degrees and Longitude -122.5939 degrees for the 2,475-year return period. The S_s for the site is 0.89 g and S_1 is 0.33 g. Because the site class is E, site response analysis is required unless the criteria described in ASCE 7 section 11.4.8 is met.

4.2.7 SEISMIC HAZARDS SUMMARY

Based on our research, site explorations, and our experience with similar soils and sites, seismic hazards most likely to adversely affect the site is ground shaking and liquefaction. Seismic-induced landsliding



and other hazards present a low risk to the site. Further our analysis indicates a **Site Class E/F** designation is appropriate for the site based on the proposed development characteristics.

5.0 CONCLUSIONS

Based on our explorations, testing, and analyses, it is our opinion that the site is suitable for the proposed development, provided the recommendations in this report are considered by the final design team. We generally conclude the following regarding the site:

- The site is subject to severe ground-shaking and minor liquefaction during a seismic event. Depending on the final design, a site response analysis may be required.
- The site is generally underlain by about 10 feet of wood debris and undocumented fill. These materials are highly variable, soft, and prone to significant settlement depending on the proposed loading. The wood debris, in particular, is compressible and will continue to decompose causing future settlement. It is not suitable for fill or foundation support. We recommend that the wood debris be removed prior to development.
- Replacement of the relatively light weight wood debris with structural fill will induce loads on the underlying soils as will the placement of new fill above current grades. These loads will cause settlement of the very soft to soft clays and silts that extend to depths of about 30 and 35 feet bgs. Site development should account for settlement of site soils and fill as described in this report.
- Foundation design will likely be controlled by settlement and differential settlement. Alternatives such as floating mat foundations or piles will likely be required to support building loads.
- Seismic and static settlement will likely include downdrag loads on any deep foundations used at the site. Once the development plans are finalized, downdrag loads should be evaluated during foundation design.
- Based on the observed moisture contents of the site soils, near-saturated conditions should be expected throughout most of the year, especially in the observed fine-grained soils with low permeabilities.
- The non-organic existing fill and native fine-grained soils are not suitable for re-use as structural fill without significant moisture conditioning. The spoils generated from excavations should be hauled off site and disposed of properly.
- Excavations performed at the site can be completed with conventional earthwork equipment.
- The fine-grained soils identified at the site will be moisture-sensitive and will be easily disturbed (e.g., rutted, pumped, etc.) by construction activities if care is not taken to reduce disturbance.

The following sections present our preliminary recommendations for design of the project.

6.0 PRELIMINARY STRUCTURAL DESIGN RECOMMENDATIONS

6.1 FOUNDATION RECOMMENDATIONS

The results of our field investigation indicate the site is generally underlain by up to 10 feet of wood debris fill, which is underlain by native silts, clays, and gravels. Compressible soil is present at depths up to 35 feet. As previously noted, the wood debris fill will continue to settle over the long term and is not suitable for supporting structural loads and should be completely removed from beneath the proposed structural footprint unless deep foundations and/or other measures are put in place to allow long term settlement without future damage. Further, the non-plastic silts at the northern end of the site are susceptible to



liquefaction and potential seismically induced settlement. Materials suitable for foundation bearing loads are present at depths below about 30 and 45 feet below the ground surface.

Several foundation options could be employed at the site to mitigate both static settlement issues as well as seismic capacity loss and settlement. In both static and seismic cases, differential settlement should be evaluated due to the variability in subsurface conditions across the site and variability in mitigation measures that may have different effects on soil behavior. The following sections discuss preliminary design recommendations and considerations for a few foundation options.

6.1.1 Shallow Foundations

Due to the potential for both static and seismic settlement, shallow foundations are generally not recommended at the site unless a mat foundation or structural grade beam foundation is used in combination with removal of all wood debris and fill and surcharge and/or over-excavation of native compressible materials. Over-excavations could be used to balance site loads with basement or underground parking levels or backfilled with structural fill that will help reduce the effects of differential settlement and bearing capacity issues. Code based foundation and slab design parameters for soft clays are appropriate for native onsite soils unless otherwise evaluated at the time of design. Below are additional considerations for design of shallow foundations.

- We anticipate that settlement will control shallow foundation design and settlement should be evaluated once a design plan is in place.
- Removal and replacement of the wood debris and soft fill layers will result in an increase in loading of the underlying soils. Settlement should be expected in underlying layers, as provided in this report, and a settlement monitoring program should be put in place to determine when the expected settlement due to fill and foundation loads is within the allowable limits for structure design.
- Fill, surcharge, and foundation loads may vary greatly across the site and could induce significant differential settlement. Surcharge programs and foundation design should be developed considering differential settlement.
- The northern half of the site is underlain by 0 to 10 feet of liquefiable material and depending on structure placement, differential settlement may up to about an inch. Structural foundations should be tied together and designed to resist any expected differential settlement.

6.1.2 Deep Foundation Recommendations

Deep foundations that extend below the compressible and liquefiable layers could be used to support building loads provided the considerations below are included in design. We have provided a preliminary design for a 16-in pipe pile for design planning purposes. The typical static compressive capacity is shown in Figure 4.

- Soil bearing layers are typically found below 30 to 45 feet below the ground surface. They consist of very dense to dense gravels and stiff clays, mostly associated with weathered Troutdale Formation.
- Static settlement in the overlying compressible layers will induce potentially significant downdrag on piles at the site. Further, any structural fills that are placed in over-excavations will increase downdrag loads if piles are placed prior to the settlement occurring.
- Seismic settlement may induce downdrag loads on piles on the northern half of the site.



- Fills or structural loads placed in areas adjacent to locations where piles are installed during phased or future construction will induce loads on existing piles due to the depth and compressibility of site soils.

6.1.3 *Static Pile Design*

Nominal single pile resistance was calculated using FHWA methods outlined in the ODOT Geotechnical Design Manual (GDM, ODOT 2022) for a typical soil subsurface section. We have provided static axial capacity in Figure 4 based on this subsurface section. This is the geotechnical capacity of 16-inch pipe piles at varying depth and does not consider the structural capacity of the piles, which should be determined by the structural engineer. Design does not include downdrag due to static settlement in the underlying compressible layers and assumes that piles will be embedded a minimum of 50 feet bgs. Seismic design recommendations including seismic downdrag forces are not provided. Factors of safety should be evaluated at the time of design based on proposed installation and testing methods.

Our estimated pile resistances are based on our interpretation of soil properties deduced from our boring advanced to a depth of 66 feet. Subsurface conditions below this depth are based on extrapolation of the material encountered at the bottom of the boring, which is a highly likely condition. We have assumed a “plugged” condition develops in the pile to allow tip resistance over the full projected area of the pile tip if driven open ended.

The structural engineer should verify that the pile is designed to structurally support the anticipated design loads. Driving stresses may control and pile sizes should be considered in structural design. Pile group effects should be accounted for in design.

We estimate pile settlement will be up to approximately 1 inch under design dead and live loads or piles founded in layers below 50 feet bgs.

6.2 *Foundation Drains*

We recommend that a foundation drain be included at the base of exterior footings. The footing drain should consist of a filter fabric-lined, drain rock-filled trench that extends at least to the bottom of foundations. A minimum 4” diameter perforated pipe should be placed at the base to collect water that gathers in the drain rock. The discharge for the footing drain should not be tied directly into the storm water drainage system unless mechanisms are installed to prevent backflow.

6.3 *FLOOR SLABS*

Satisfactory subgrade support for building floor slabs supporting up to 125 psf areal loading can be obtained from new structural fill when prepared in accordance with the recommendations presented in this report. A minimum 6-inch-thick layer of crushed rock should be placed over the prepared subgrade to assist as a capillary break. In areas where moisture could be detrimental to floor coverings inside proposed structures, a vapor barrier might be considered. The use of vapor barriers should be at the discretion of the architect or structural engineer. We recommend using a subgrade modulus of 150 pounds per cubic inch (pci) to design slabs supported by compacted structural fill, provided unsuitable soils areas overexcavated and replaced as recommended, surface soils are scarified and compacted at optimum moisture content, and the crushed rock capillary break is placed and properly compacted.

Floor slabs constructed as recommended should be designed to withstand expected settlement and differential settlement as described above.



6.4 RETAINING WALLS

Because the site is relatively flat, retaining walls are expected to consist mostly of concrete cantilever walls and foundation walls. For preliminary design of cast-in-place (PIC) walls, the lateral earth pressures in Table 2 can be used. The provided lateral earth pressures assume that (1) the wall is backfilled with structural fill; (2) maximum retained height is 10 feet or less; (3) the backfill is drained so hydrostatic pressures do not develop against the wall; and (4) the surface at the top and toe of the wall is flat.

Where walls will be surcharged from traffic, an equivalent surcharge equal to 250 psf should be applied as a uniform surface load at the top of the wall. If other surcharges will be placed within a distance behind the wall equal to the wall height, then additional surcharges may be required.

Table 2. Retaining Structure Design Earth Pressures

Wall Condition	Earth Pressure Parameters for Cantilever Walls (as an equivalent fluid pressure)			
	Friction Angle	Unit Weight	Coefficient	Earth Pressure (pcf)
At-rest	30	120 pcf	0.5	60
Active	30	120 pcf	0.33	40
Passive	30	110 pcf	3.0	330

Note: Subject to the assumptions noted. The above values do not include a Factor of Safety.

Permanent retaining structures should also be designed to account for seismic loading. For preliminary seismic design of retaining structures, a superimposed seismic thrust of 12 pcf can be used as an equivalent fluid density.

7.0 PRELIMINARY EARTHWORKS RECOMMENDATIONS

We have assumed that grading across the site will be limited to cuts and fills of 5 feet or less. Trench excavations are expected to be 4 feet or less below grade. If grading will significantly vary from these assumptions, then further evaluation will be necessary. Our general earthworks recommendations for preliminary design and based on these assumptions follow.

7.1 SITE PREPARATION AND GRADING

7.1.1 Site Preparation

Site preparation will mostly consist of demolition of existing surface structures, such as pavements and short retaining walls, and overexcavation and replacement of unsuitable fills within areas to be developed. Replacement of unsuitable fills should consist of structural fill as recommended later in this report. Stripping and grubbing are expected to be minimal as the site is mostly developed. If utility lines cross beneath proposed structures, they should be removed in their entirety or grouted in place.

7.1.2 Subgrade Evaluation

Subgrade evaluation is anticipated to consist of proofrolling structural areas once site preparation is completed. Where proofrolling is not possible due to access constraints, other methods should be employed



such as probing with a foundation probe to confirm subgrade soils are suitable. Where soft soils are identified, they should be removed to the extent they occur and replaced with structural fill as described elsewhere in this report.

7.1.3 Wet Weather Construction

Soils within anticipated excavation depths are expected to consist of fill overlying native fine-grained soil or native fine-grained soils to near the surface. The fill may consist of granular fill, organics, and/or fine-grained soils. The native soils and any fine-grained fill are generally soft and will be easily disturbed during the wet season. If not carefully executed, site preparation, excavation, and subgrade preparation can create unstable areas and significant repair costs can result. Significant disturbance to the subgrade should be expected if site preparation and earthwork activities are conducted during periods of excessive wet weather and/or when the moisture content of the surficial soils exceeds the optimum. Earthwork planning should include dry weather construction or considerations for minimizing disturbance to the subgrade during wet weather.

7.1.4 Excavation and Trenching

Maximum cut and fill slopes should generally not exceed gradients of 2 horizontal to 1 vertical (2H:1V). Where slopes will be maintained for landscaping or other purposes, a lower gradient of 3H:1V is recommended.

Trench excavations will generally stand vertical to 4 feet deep, except where seepage is encountered or in areas of soft fill. All excavation and trenching should follow OSHA requirements and be the responsibility of the contractor. Soils should be considered OSHA Type C for excavation purposes.

Water infiltration into trenches may occur from surface water and shallow perched groundwater zones. Regional groundwater is estimated to be about 20 feet bgs, so is not expected to affect most trenching and grading.

7.1.5 Structural Fills

Structural fills should be considered to include all fills on slopes greater than 5H:1V, all subgrade soils beneath foundations, slabs, pavements, and other areas intended to support structures, and all areas within the influence zone of structures, including behind retaining walls a distance equal to the wall height.

Fills should only be placed over a subgrade that has been prepared in conformance with this report. A variety of material may be used as structural fill at the site. However, all material used as structural fill should be free of debris, clay balls, roots, organic matter, frozen soil, man-made contaminants, particles with greatest dimension exceeding 4 inches, and other deleterious materials.

Structural fills should be constructed per the requirements of the Oregon Structural Specialty Code (SSC) and the Oregon Department of Transportation's Standard Specifications (OSS). Suitable fills should be selected based on their use and suitability per the OSS. Imported structural fill should meet the requirements of the OSS for their intended use.

On-site native and fill soils are generally fine-grained and not suitable for reuse as structural fill. Where crushed rock or other granular material is present, it can be excavated and stockpiled for on-site use, provided it meets the specifications for the specific use. Existing AC can be removed and processed as structural fill, provided the gradation meets the OSS and where allowed by the OSS.



Structural fills associated with any building structures should comply with the requirements of the SSC, latest edition.

7.2 SITE PAVEMENTS

Pavement design depends on a number of factors, including:

1. Design traffic,
2. Desired pavement life,
3. Acceptable serviceability and reliability parameters, and
4. Subgrade modulus/California Bearing Ratio (CBR) values.

Factors 1 through 3 will be determined by the developer for final design.

Factor 4, CBR, depends on the subgrade soils present at the site and their preparation. Overall, we anticipate that pavement sections at the site will be typical of similar commercial development. Where unsuitable fill is replaced with structural fill, design CBR values could be higher, resulting in reduced/minimal pavement sections. Where such soils are not constructed, CBR values may be relatively low, requiring thicker sections. Scarifying and recompacting areas of native subgrade soil to a dense state will result in an increased CBR values and resulting thinner pavement sections.

Where differential settlement may be excessive, AC pavements would be preferable over Portland Cement Concrete (PCC) pavements due to their greater flexibility.

8.0 CONSTRUCTION OBSERVATIONS

We recommend the project geotechnical engineer of record be retained to monitor construction at the site per the City of Oregon City Municipal Code (OCMC). The geotechnical engineer should confirm that subsurface conditions are consistent with site explorations, and that the intent of project plans and specifications relating to earthwork and foundation construction are being met.

9.0 LIMITATIONS

We have prepared this geotechnical report for use by the City of Oregon City and their affiliates for the proposed development in Oregon City, Oregon. Our work was completed in general accordance with our services agreement. Our report is intended to evaluate geologic hazards and provide preliminary geotechnical recommendations for design of the project. It is anticipated that additional geotechnical explorations and engineering recommendations will be provided by others for final design of the development.

Within the limitations of scope, schedule and budget, our services have been executed in accordance with generally accepted practices in the field of geotechnical engineering in this area at the time this report was prepared. No warranty, express or implied, should be understood.

Any electronic form, facsimile or hard copy of the original document (email, text, table, and/or figure), if provided, and any attachments are only a copy of the original document. The original document is stored by Pali Consulting and will serve as the official document of record.



10.0 REFERENCES

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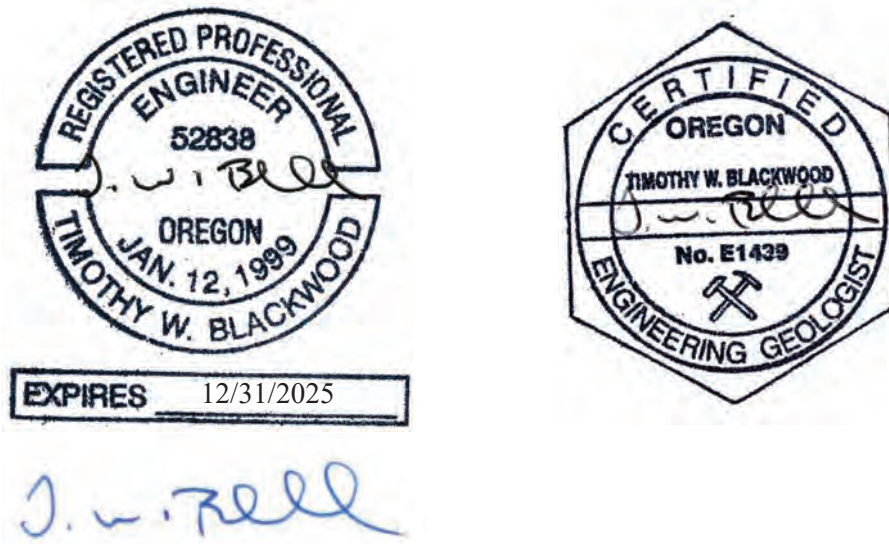
USGS 2018. U.S. Seismic Design Maps <http://www.earthquake.usgs.gov/designmaps/us/application.php>.



11.0 CLOSING

We appreciate the opportunity to submit this report for your project. Please contact us if you have any questions or need additional information.

Sincerely,



Timothy W. Blackwood, PE, GE, CEG
President/Principal Engineer

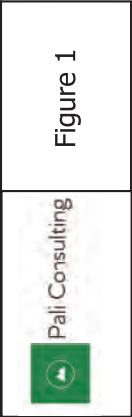
Attachments (Figures 1 - 4, Appendix A)

Document ID: 082-23-004-WashingtonStGeotechnicalReport

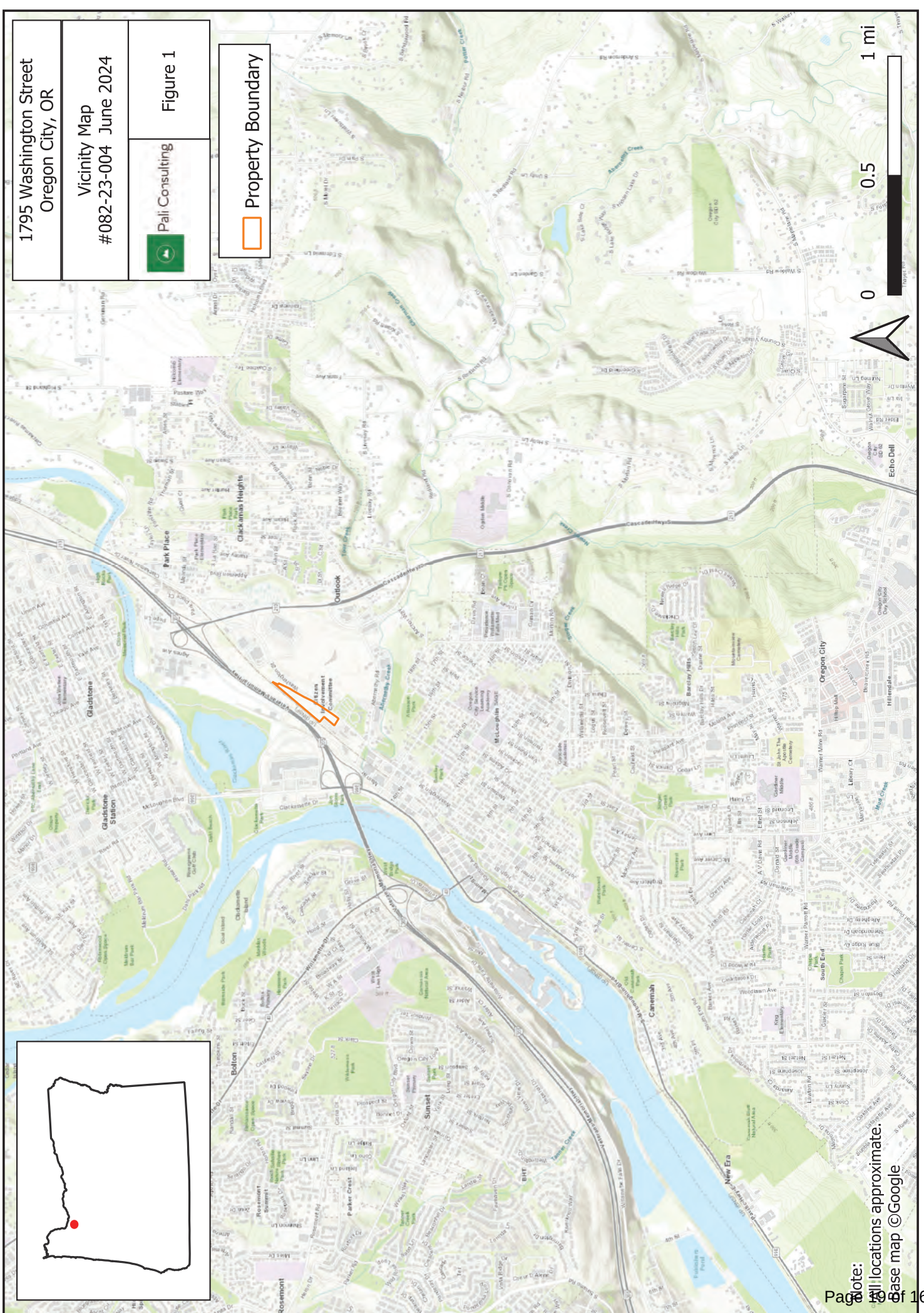
Vicinity Map #082-23-004 June 2024	 Pall Consulting Figure 1
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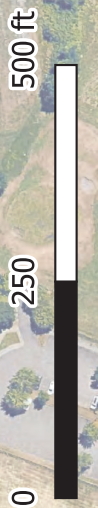


 Property Boundary

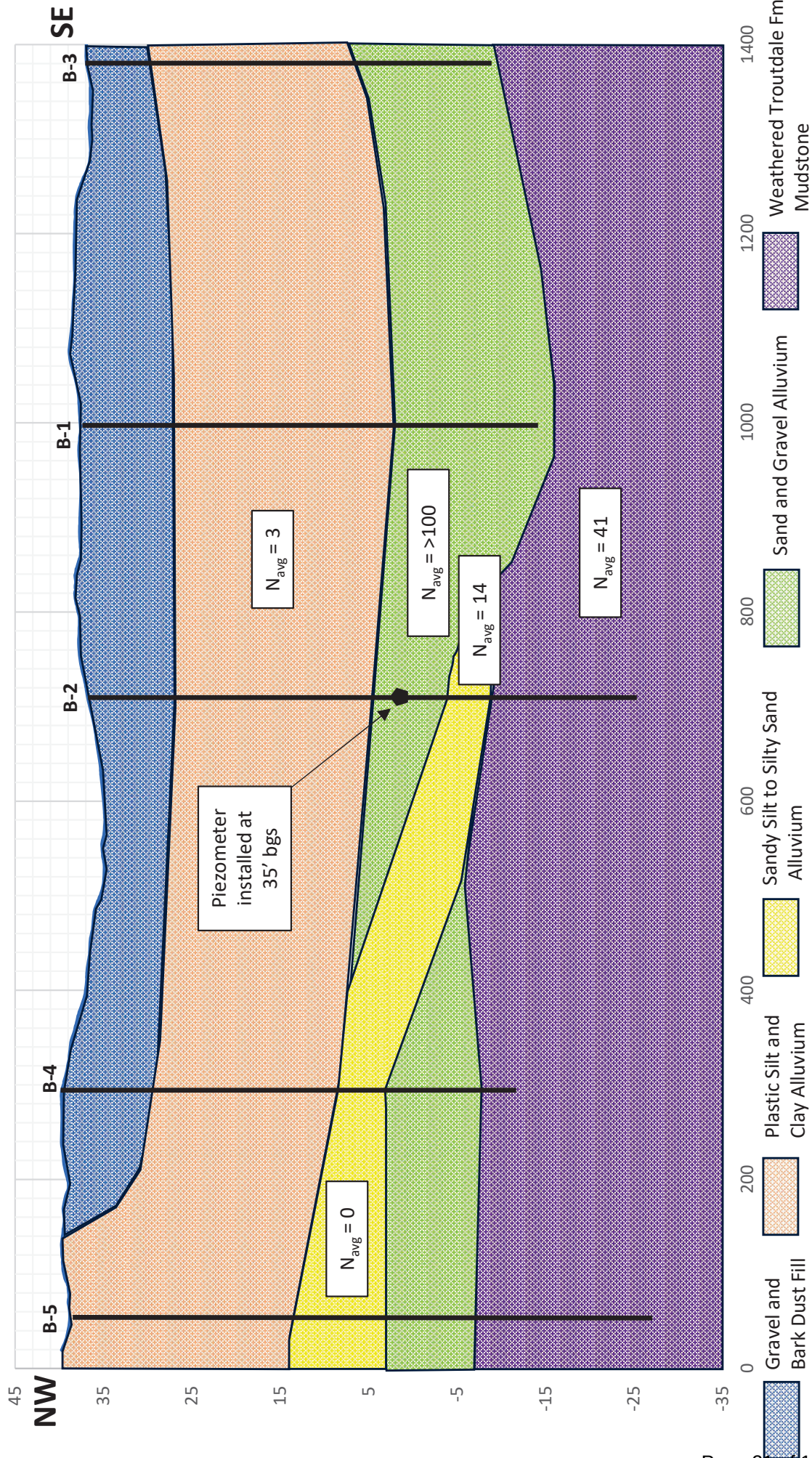


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B-1 ● Boring Locations
 □ Property Boundary



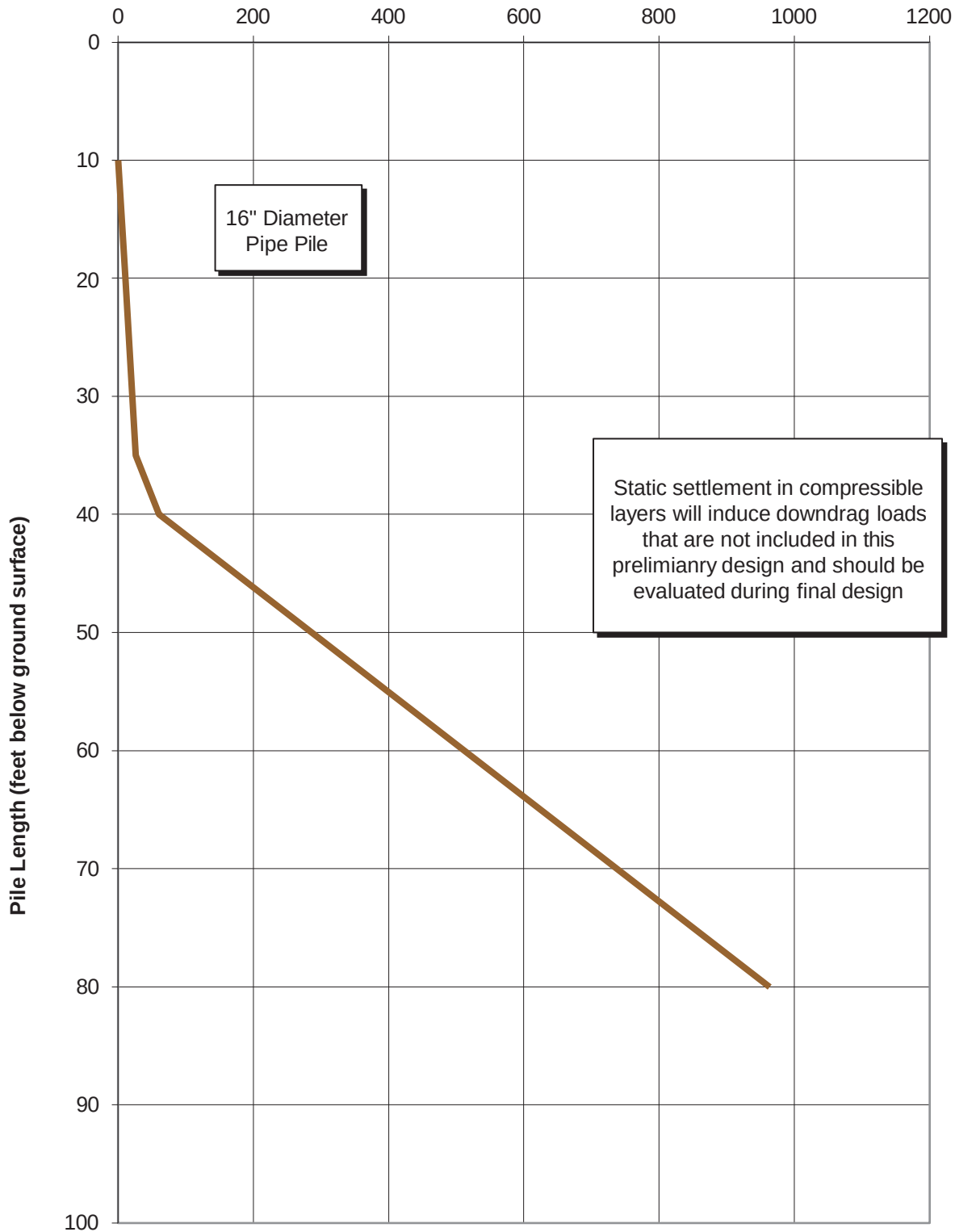
Notes: Cross sections based on LiDAR data provided by DOGAMI. All distances and elevations are approximate. Native soils are as interpreted by Pali Consulting staff, see Report and Appendix A for further description of subsurface conditions. N_{avg} refers to average SPT blow counts (see Report and Appendix A).





Steel Pipe Pile Capacity

Figure 4



APPENDIX A - FIELD EXPLORATIONS AND LABORATORY TESTING



FIELD EXPLORATIONS

GENERAL

We evaluated subsurface soil and groundwater conditions at the site by completing five mud rotary borings between April 8th and April 10th, 2024. The borings were completed with a truck mounted drill rig operated by Western States Soil Conservation, Inc. The borings were overseen by geologic staff from Pali Consulting. The locations of the explorations are shown on Figure 2 of the report. The exploration locations were approximately located by pacing from existing features so should be considered approximate.

SAMPLING AND LOGGING

Soil samples were collected from the borings at the intervals noted on the exploration logs in this appendix. Sampling was completed with split spoon samplers and Shelby tube sampling in general accordance with ASTM D1586 and D1587, respectively. All samples obtained were sealed in watertight containers and transported to our laboratory for subsequent classification and testing. Soil sampling intervals are shown in the exploration logs in this appendix.

The field explorations were coordinated by a geologist on our staff, who located the explorations, classified the various soil units encountered, obtained representative soil samples for geotechnical testing, and maintained a detailed log of each exploration. Exploration logs are included in this Appendix.

PIEZOMETER INSTALLATION

A vibrating wire piezometer manufactured by RST Instruments (VW2100) was installed in Boring B-2 as noted in the report. The piezometer was fully saturated and brought to ambient temperature at the site prior to installation. The piezometer and wire were taped to a 1" diameter PVC pipe and lowered to a pre-determined depth. The piezometer was then grouted in place using tremie methods.

After installation, an RST Instruments Data Logger (DT2011B) was connected to the piezometer. The piezometer was set up and data collection initiated using the RST DT Logger Host software and per the manufacturer's instructions. Data is logged at 8-hour intervals. The data used in the report was collected approximately two weeks after installation.



LABORATORY TESTING

GENERAL

Soil samples obtained from the explorations were evaluated to confirm or modify field classifications, as well as to evaluate their engineering properties. Representative samples were selected for laboratory testing. The tests were performed in general accordance with the test methods of the ASTM or other applicable procedures. Test results are indicated on the boring logs.

VISUAL CLASSIFICATIONS

Soil samples obtained from the explorations were visually classified in the field and in our geotechnical laboratory based on the USCS and ASTM classification methods. ASTM Test Method D2488 was used to classify soils using visual and manual methods. ASTM Test Method D2487 was used to classify soils based on laboratory test results.

Moisture Content

Moisture contents of samples were obtained in general accordance with ASTM Test Method D2216. The results of the moisture content tests completed on samples from the explorations are presented on the exploration logs included in this Appendix.

Fines Content Analyses

Fines content analyses were performed to determine the percent of soils finer than the U.S. No. 200 Sieve, the boundary between sand size particles and silt size particles. The tests were performed in general accordance with ASTM Test Method D 1140. The test results are indicated on the exploration logs included in this Appendix.

Atterberg Limits

Atterberg limits (liquid limit, plastic limit, and plasticity index) of fine-grained soil samples were obtained in general accordance with ASTM Test Method D4318-02. The results of the Atterberg limits tests completed on samples from the explorations are presented on Figure A-1 in this Appendix.

Consolidation Testing

Consolidation testing was performed on undisturbed soil samples in general accordance with ASTM Test Method D 2435. The results of the tests are included in this Appendix.

KEY TO EXPLORATION LOGS



Pali Consulting

4891 Willamette Falls Drive, Suite 1
West Linn, Oregon 97068
www.pali-consulting.com

SOILS CLASSIFICATION CHART

MAJOR DIVISIONS			SYMBOLS	TYPICAL DESCRIPTIONS
			LETTER	
COARSE GRAINED SOILS MORE THAN 50% RETAINED ON NO. 200 SIEVE	GRAVEL AND GRAVELLY SOILS MORE THAN 50% OF COARSE FRACTION RETAINED ON NO. 4 SIEVE	CLEAN GRAVELS (LITTLE OR NO FINES)	GW	WELL-GRADED GRAVELS, GRAVEL - SAND - MIXTURES
			GP	POORLY GRADED GRAVELS, GRAVEL - SAND MIXTURES
		GRAVELS WITH FINES (APPRECIABLE AMOUNT OF FINES)	GM	SILTY GRAVELS, GRAVELS - SAND - SILT MIXTURES
			GC	CLAYEY GRAVELS, GRAVEL- SAND - CLAY MIXTURES
	SAND AND SANDY SOILS MORE THAN 50% OF COARSE FRACTION PASSING NO. 4 SIEVE	CLEAN SAND (LITTLE OR NO FINES)	SW	WELL-GRADED SANDS, GRAVELLY SANDS
			SP	POORLY-GRADED SANDS, GRAVELLY SANDS
		SANDS WITH FINES (APPRECIABLE AMOUNT OF FINES)	SM	SILTY SANDS, SAND - SILT MIXTURES
			SC	CLAYEY SANDS, SAND - CLAY MIXTURES
FINE GRAINED SOILS MORE THAN 50% PASSING NO. 200 SIEVE	SILTS AND CLAYS LIQUID LIMIT LESS THAN 50		ML	INORGANIC SILTS, ROCK FLOUR, CLAYEY SILTS WITH SLIGHT PLASTICITY
			CL	INORGANIC CLAYS OF LOW TO MEDIUM PLASTICITY, GRAVELLY CLAYS, SANDY CLAYS, SILTY CLAYS, LEAN CLAYS
			OL	ORGANIC SILTS AND ORGANIC SILTY CLAYS OF LOW PLASTICITY
	SILTS AND CLAYS LIQUID LIMIT GREATER THAN 50		MH	INORGANIC SILTS, MICACEOUS OR DIATOMACEOUS SILTY SOILS
			CH	INORGANIC CLAYS OF HIGH PLASTICITY
			OH	ORGANIC CLAYS AND SILTS OF MEDIUM TO HIGH PLASTICITY
HIGHLY ORGANIC SOILS			PT	PEAT-HUMUS, SWAMP SOILS WITH HIGH-ORGANIC CONTENTS

SYMBOLS LETTER	DESCRIPTIONS
CC	CEMENT CONCRETE
AC	ASPHALT CONCRETE
TS	TOPSOIL/SOD FOREST DUFF

Stratigraphic Contact

- Distinct contact between soil strata or geologic units
- Gradual or approximate change between soil strata or geological units

Note: Multiple symbols are used to indicate borderline or dual soil classifications

Moisture Modifiers

- Dry -** Absence of moisture, dusty, dry to the touch
- Moist -** Damp, but no visible water
- Wet -** Visible free water or saturated, usually soil is obtained from below the water table

Seepage Modifiers

- None**
- Slow -** < 1 gpm
- Moderate -** 1- 3 gpm
- Heavy -** > 3 gpm

Caving Modifiers

- None**
- Minor -** isolated
- Moderate -** frequent
- Severe -** general

Minor Constituents

- Trace:** < 5% (silt/clay)
- Occasional:** < 15% (sand/gravel)
- With:** 5-15% (silt/clay) in sand or gravel
15-30% (sand/gravel) in silt or clay

Sampler Symbol Descriptions

- Core**
- Standard Penetration Test (SPT)**
- Shelby tube**
- Piston**
- Bulk or grab**

Laboratory / Field Tests

- %F** Percent fines
- AL** Atterberg Limits
- CP** Laboratory compaction test
- CS** Consolidation test
- DS** Direct shear
- HA** Hydrometer analysis

Laboratory / Field Tests

- DD** Dry density
- OC** Organic content
- PP** Pocket penetrometer
- SA** Sieve analysis
- TV** Torvane shear
- MC** Moisture Content

Blowcount (N) is recorded for driven samplers as the number of blows required to advance sampler 12 inches (or distance noted) per ASTM D-1586. See exploration log for hammer weight and drop.

A "P" indicates sampler pushed using the weight of the drill rig.

(2.4-inch) sampler N approximately corrected to equivalent SPT N by 50% reduction in N - modified California.

Note: Refer to the report text and exploration logs for a proper understanding of subsurface conditions. Descriptions on the logs apply only at the exploration locations at the time the explorations were made. The logs are not warranted to be representative of the subsurface conditions at other locations or times.



Pali Consulting

1795 Washington St

B-1

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/8/24

Drilling Method: Mud Rotary

Elevation: 40'

Diameter: 4"

Water Table: N/A

Logged by: JLE

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S1		10		9-8-5	13		0		GM Medium dense, moist, grey SILTY GRAVEL (FILL)		
S2		10		6-4-5	9		5		VG Red-brown, moist BARK DUST (FILL)	182	
S3		10		2-2-4	6						
S4		50		2-2-4	6		10		MH Medium stiff, moist, grey ELASTIC SILT with blocky appearance, minor wood chips and charcoal (FILL)	37	
S5		100					15		MH Medium stiff, moist, grey ELASTIC SILT with smooth appearance, minor charcoal (NATIVE ALLUVIUM)		0-1' 200 psi, 1-2' 350 psi
S6		100		0-1-2	3		20		Grades to soft, no charcoal fragments present	48	AL: LL=55, PL=34, PI=21
S7		100									
S8		66		0-0-2	2		25		Mottled grey to brown in color	50	%F=99
S9		100		0-0-0	0		30		Grades to very soft		



Pali Consulting

1795 Washington St

B-1

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/8/24

Drilling Method: Mud Rotary

Elevation: 40'

Diameter: 4"

Water Table: N/A

Logged by: JLE

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S10		10		15-19-15	34		35		GM Dense, moist, grey, SILTY GRAVEL		
S11		10		42-50 for 5"	>100		40		SM Very dense, moist, grey SILTY SAND with GRAVEL		
S12		10		30-50 for 2"	>100		45				
S13		75		19-38-50 for 4"	>100		50				
									END Boring completed at 51.5' bgs		
							55				
							60				
							65				



Pali Consulting

1795 Washington St

B-2

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No.: 082-23-004

Date: 4/9/24

Drilling Method: Mud Rotary

Elevation: 37'

Diameter: 4"

Water Table : N/A

Logged by: JLE

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
							0		GM		
									VG		
S1		0		6-5-6	11				Red-brown, moist BARK DUST (FILL)		SPT attempted, no sample recovery
S2		20		2-3-3	6		5				
S3		20		6-5-7	12		10		Soft, moist, grey ELASTIC SILT with blocky appearance, minor wood and charcoal fragments (FILL)	50	
S4		50		0-2-2	4		15		Soft, moist, grey, ELASTIC SILT, smooth appearance (NATIVE ALLUVIUM)	50	AL: LL=58, PL=33, PI=25
S5		66		0-1-2	3		20				0-2' 200 psi
S6		100					25		Grades to very soft		
S7		100		0-0-0	0		30				0-1' 200 psi, 1-2' 250 psi
S8		100		0-0-0	0				Grades to wet, with brown mottling	57	AL: LL=55, PL=36, PI=19
									GW		Drillers report gravel at 32.5'



Pali Consulting

1795 Washington St

B-2

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/9/24

Drilling Method: Mud Rotary

Elevation: 37'

Diameter: 4"

Water Table: N/A

Logged by: JLE

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S9		70		50 for 5"	>100		35		Very dense, wet, grey, well-graded GRAVEL with sand	13	RST Instruments VW2100 piezometer installed at 35' bgs
S10		20		24-11-3	14		40	SM	Medium dense, wet, brown, SILTY FINE SAND		AL: Nonplastic
S11		100		7-12-20	32		45	ML	Hard, moist, blue-grey SANDY SILT with occasional rounded gravels (WEATHERED TROUTDALE FM)		
S12		100		25-29-24	53		50		Grades to silt, no gravel or sand		
S13		100		13-20-27	47		55		With few rounded gravels		
S14		100		12-19-30	49		60				
								END	Boring completed at 61.5' bgs		
							65				



Pali Consulting

1795 Washington St

B-3

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/8/24

Drilling Method: Mud Rotary

Elevation: 37'

Diameter: 4"

Water Table: N/A

Logged by: JR

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S1		30		6-3-3	6		0		GM Loose, moist, grey SILTY GRAVEL (FILL)		
S2		80		0-2-2	4		5			40	
S3		100		0-0-0	0		10		MH Very soft, moist, grey ELASTIC SILT (NATIVE ALLUVIUM)	42	
S4		0		0-0-0	0		15				No sample recovery
S5		100					20				0-1' 150 psi, 1-2' 350 psi
S6		100		0-2-2	4		25		Grades to soft, light grey	45	AL:LL=56, PL=32, PI=24
S7		100					30				0-1' 350 psi, 1-2' 400 psi
S8		100		0-0-0	0		35		Grades to very soft, with brown mottling		
S9		100		12-26-34	60		40		SC Very dense, moist, brown CLAYEY SAND with minor gravel	47	



Pali Consulting

1795 Washington St

B-3

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/8/24

Drilling Method: Mud Rotary

Elevation: 37'

Diameter: 4"

Water Table: N/A

Logged by: JR

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S10		10		50 for 5"	>100		35		GM Very dense, moist, brown SILTY GRAVEL		
S11		25		26-50 for 2"	>100		40		GW Very dense, wet, grey, WELL GRADED GRAVEL with coarse sand		
S12		50		50 for 4"	>100		45		END Without sand Boring completed at 45.5' bgs		
							50				
							55				
							60				
							65				



Pali Consulting

1795 Washington St

B-4

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/10/24

Drilling Method: Mud Rotary

Elevation: 40'

Diameter: 4"

Water Table: N/A

Logged by: JR

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S1		0		3-6-6	12		0		GW Well-graded GRAVEL FILL		
S2		0		9-10-10	20		5		VG Cuttings consist of red-brown BARK DUST (FILL)		SPT attempted, no sample recovery
S3				5-5-7	12					160	SPT attempted, no sample recovery
S4				3-6-9	15		10		MH Moist, stiff, dark grey ELASTIC SILT (NATIVE)		
S5							15				0-1' 100 psi, 1-2' 200 psi
S6				0-3-2	5				Grades to medium stiff, light grey, increasing plasticity	51	AL: LL=61, LL=38, PI=23
S7							20		With wood debris		0-2' 100 psi
S8				0-0-2	2		25		Grades to soft, with brown mottling	49	AL:LL=61, PL=33, PI=28
S9							30		SM Loose, moist, grey-brown SILTY SAND	46	0-1' 100 psi, 1-2' 200 psi %F=46



Pali Consulting

1795 Washington St

B-4

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/10/24

Drilling Method: Mud Rotary

Elevation: 40'

Diameter: 4"

Water Table: N/A

Logged by: JR

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S10				26-41-46	87		35		SW Very dense, moist, grey-brown WELL-GRADED SAND with gravel, minor silt	11	%F=11
S11				38-50 for 4"	>100		40			10	
S12				12-14-17	31		45		ML Hard, moist, blue-grey SANDY SILT (WEATHERED TROUTDALE FM)		
S13				23-31-32	63		50		Grades to grey, decreasing sand		
								END	Boring completed at 51.5' BGS		
							55				
							60				
							65				



Pali Consulting

1795 Washington St

B-5

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/10/24

Drilling Method: Mud Rotary

Elevation: 37'

Diameter: 4"

Water Table: N/A

Logged by: JR

Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S1		35		3-4-4	8		0		MH Medium stiff, moist, black ELASTIC SILT with gravel (NATIVE)	42	
S2		65		0-4-9	13		5		Without gravel		
S3		75		2-3-2	5				CH Medium stiff, moist, brown FAT CLAY	45	AL: LL=70, PL=33, PI=37
S4		100					10				0-2' 100 psi
S5		100		0-4-2	6					42	
S6		100		0-0-0	0		15		Grades to very soft		
S7		50		0-0-0	0		20		Mottled appearance	50	%F=90
S8		100									0-2' 100 psi
S9		100		0-0-0	0		25		ML Very soft, moist, brown SANDY SILT	59	AL: Nonplastic
S10		100		0-0-0	0		30			48	%F=74



Pali Consulting

1795 Washington St

B-5

Project: 1795 Washington St

Driller: Western States Soil Conservation, Inc

Proj No. 082-23-004

Date: 4/10/24

Drilling Method: Mud Rotary

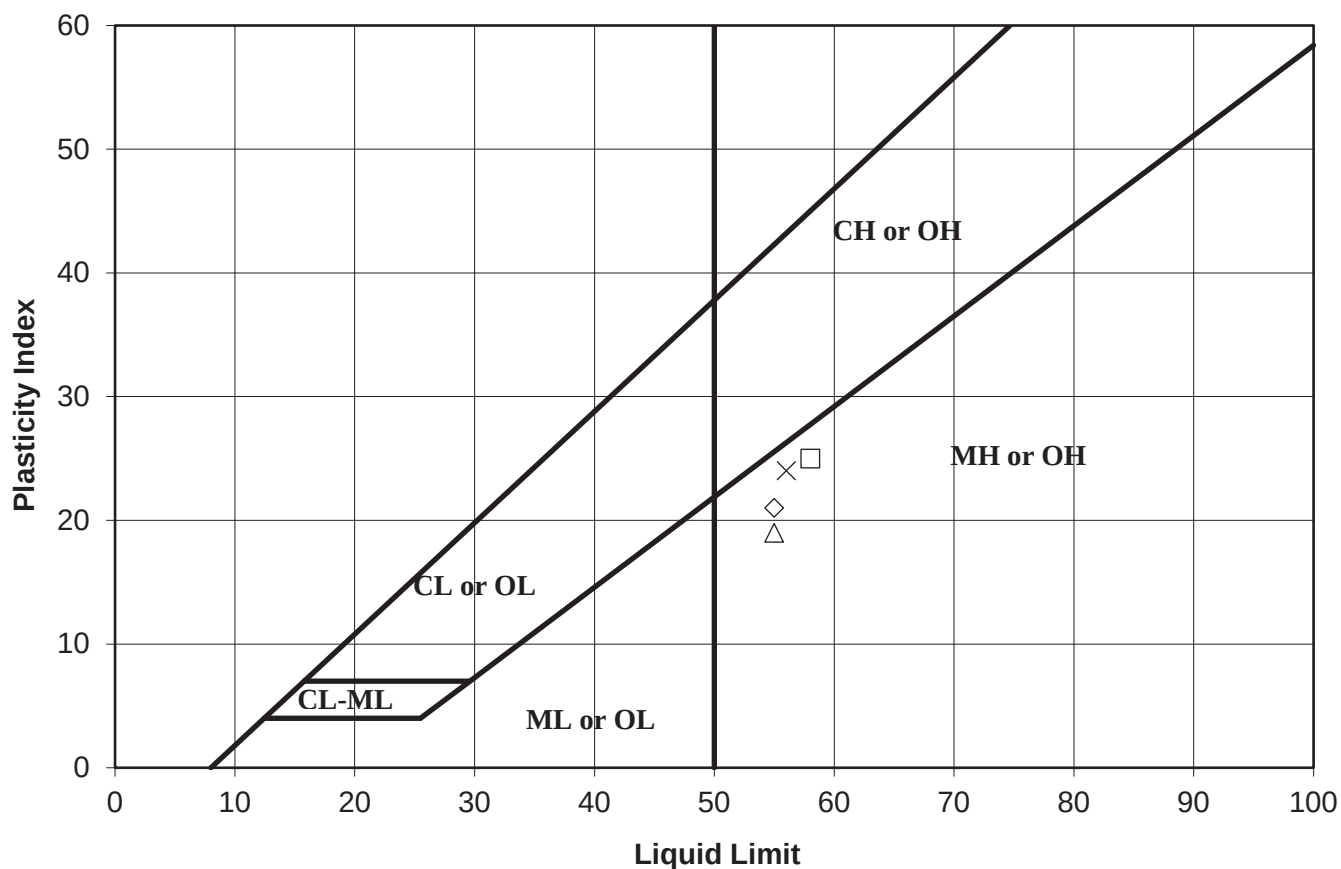
Elevation: 37'

Diameter: 4"

Water Table: N/A

Logged by: JR

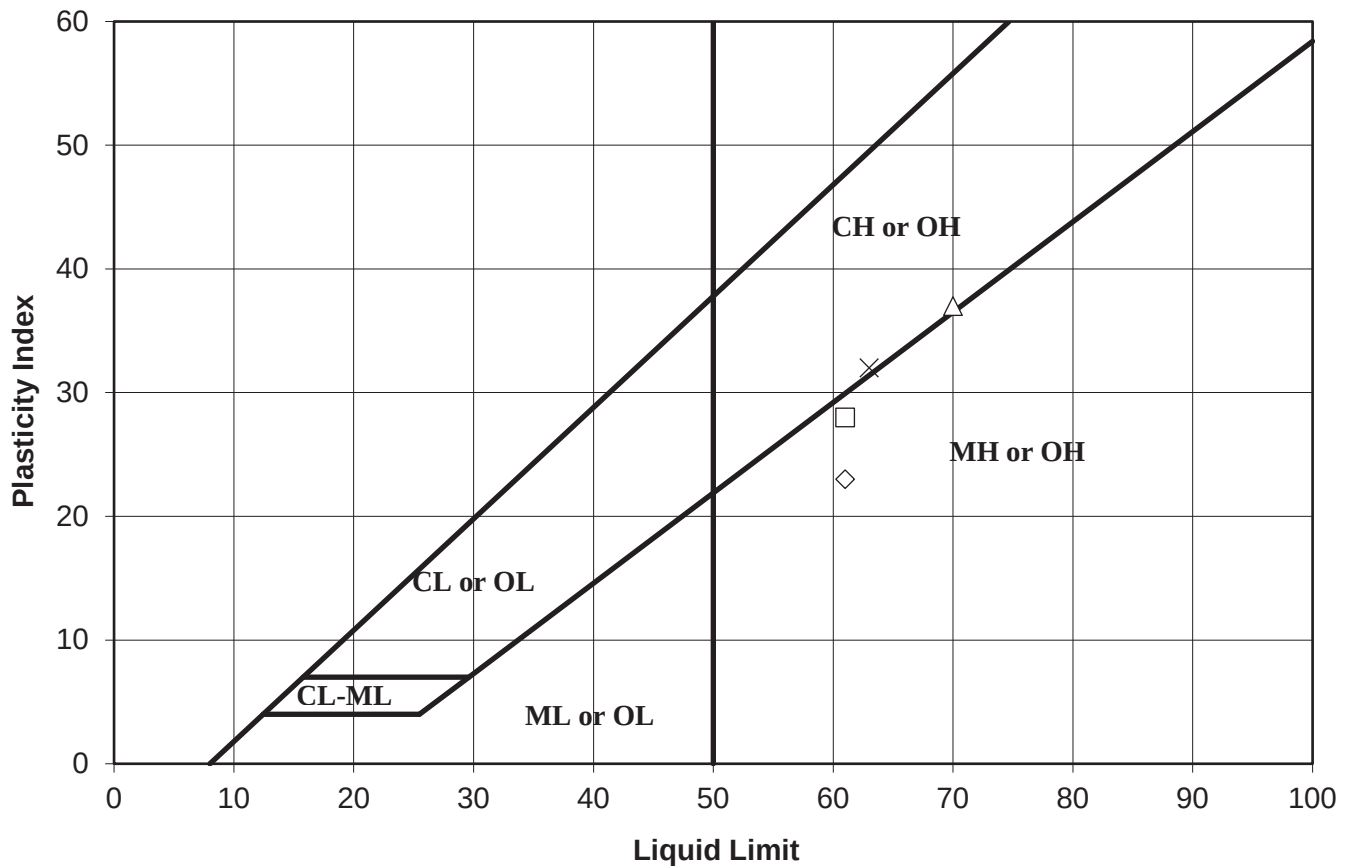
Sample No.	Sample Type	Recovery (%)	RQD (%)	Blow Count per 6 inches	Blows/Foot (N)	Water Table	Depth (ft BGS)	Graphic Log	Materials Description	Moisture (%)	Remarks
S11		30		43-27-50 for 5"	>100		35		GC Very dense, moist, brown CLAYEY GRAVEL		
S12		0		43-50 for 3"	>100		40				No sample recovery
S13		100		8-11-17	28		45		CH Very stiff, moist, blue-grey FAT CLAY with minor sand (WEATHERED TROUTDALE FM)	37	AL: LL=63, PL=31, PI=32
S14		100		9-13-20	33		50		Grades to hard		
S15		100		6-10-15	25		55		Grades to very stiff		
S16		100		21-25-26	52		60		CL Hard, moist, grey CLAY		
S17		100		7-12-23	35		65				
									END Boring completed at 66.5' bgs		



Atterberg Limits Determination							
Symbol	Boring	Sample	Depth (ft)	Liquid Limit	Plastic Limit	PI	Classification
◇	B-1	S-6	20	55	34	21	MH
□	B-2	S-4	15	58	33	25	MH
△	B-2	S-7	26.5	55	36	19	MH
×	B-3	S-6	20	56	32	24	MH

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ATTERBERG LIMITS - ASTM D4318	
1795 Washington St Project No.: 082-23-004	
 Pali Consulting	A-1



Atterberg Limits Determination							
Symbol	Boring	Sample	Depth (ft)	Liquid Limit	Plastic Limit	PI	Classification
◇	B-4	S-6	17	61	38	23	MH
□	B-4	S-8	25	61	33	28	MH
△	B-5	S-3	7.5	70	33	37	CH
×	B-5	S-13	45	63	31	32	CH

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ATTERBERG LIMITS - ASTM D4318

1795 Washington St
Project No.: 082-23-004



Pali Consulting

A-2

TECHNICAL REPORT

Report To: Joshua Robles
Pali Consulting, Inc.
1120 SW Fifth Avenue, Suite 1302
Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1

Report of: One-Dimensional Consolidation

Sample Identification

As requested, NTI provided one-dimensional consolidation testing of tube samples delivered to our laboratory by a Pali Consulting, Inc. representative on April 29, 2024. Testing was performed in general accordance with the indicated standard. Our laboratory's test results are summarized on the following tables and attached pages.

Laboratory Testing

Sample ID: B-2, S-5 @ 20.0-22.0 Ft.

One Dimensional Consolidation of Soil (ASTM D2435)			
Test		Initial Conditions	Final Conditions
Moisture Content, (%)		55.3	38.3
Dry Unit Weight, (pcf)		64.2	84.0
Height of Specimen, (inches)		1.0000	0.7428
Load (ksf)	Dial Reading (inches)	Load (ksf)	Dial Reading (inches)
Initial	0.0019	8.0	0.1669
0.25	0.0182	16.0	0.2309
0.5	0.0258	32.0	0.2962
1.0	0.0415	8.0	0.2835
2.0	0.0643	2.0	0.2714
4.0	0.1071	0.5	0.2572

Attachments: One-Dimensional Consolidation

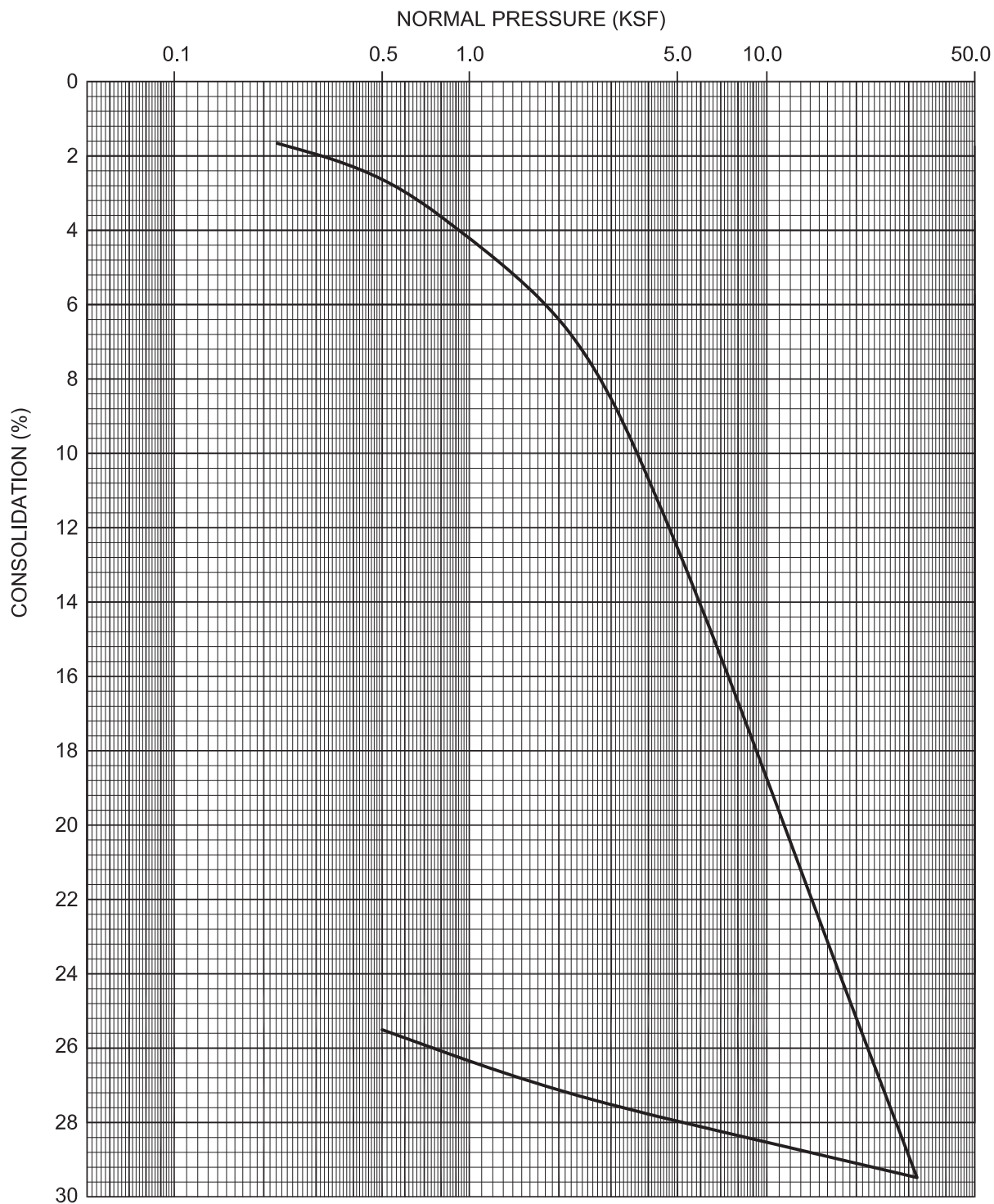
Copies: (1) Addressee
(1) Tim Blackwood, Pali Consulting, Inc.
(1) Jane Eisenberg, Pali Consulting, Inc.

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SHEET 1 of 9

REVIEWED BY: Mitchell Guha 

TECHNICAL REPORT - Test results only relate to the items tested.

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SYMBOL	SAMPLE LOCATION	NORMAL PRESSURE AT SATURATION (KSF)
—	B-2, S-5 @ 20.0 - 22.0 FT.	0.1

CONSOLIDATION TEST RESULTS - ASTM D2435

PROJECT NO. 00-223425-1

WASHINGTON STREET
PALI CONSULTING, INC.

LAB NO. 24-092

TECHNICAL REPORT

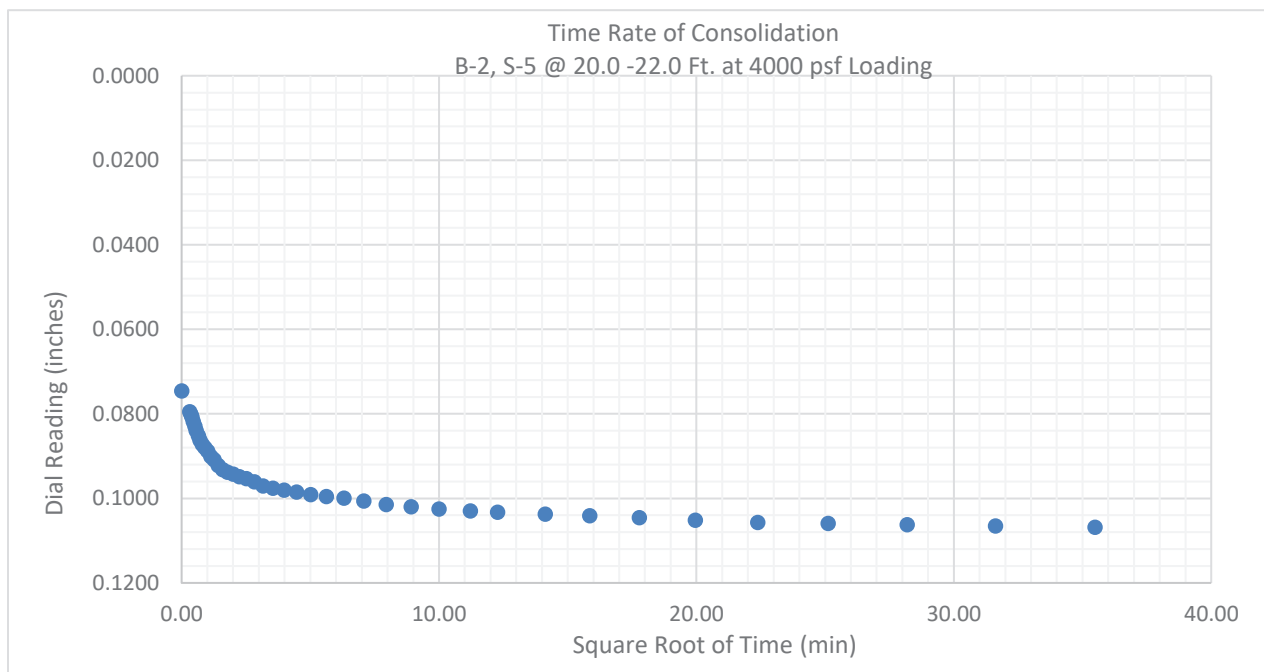
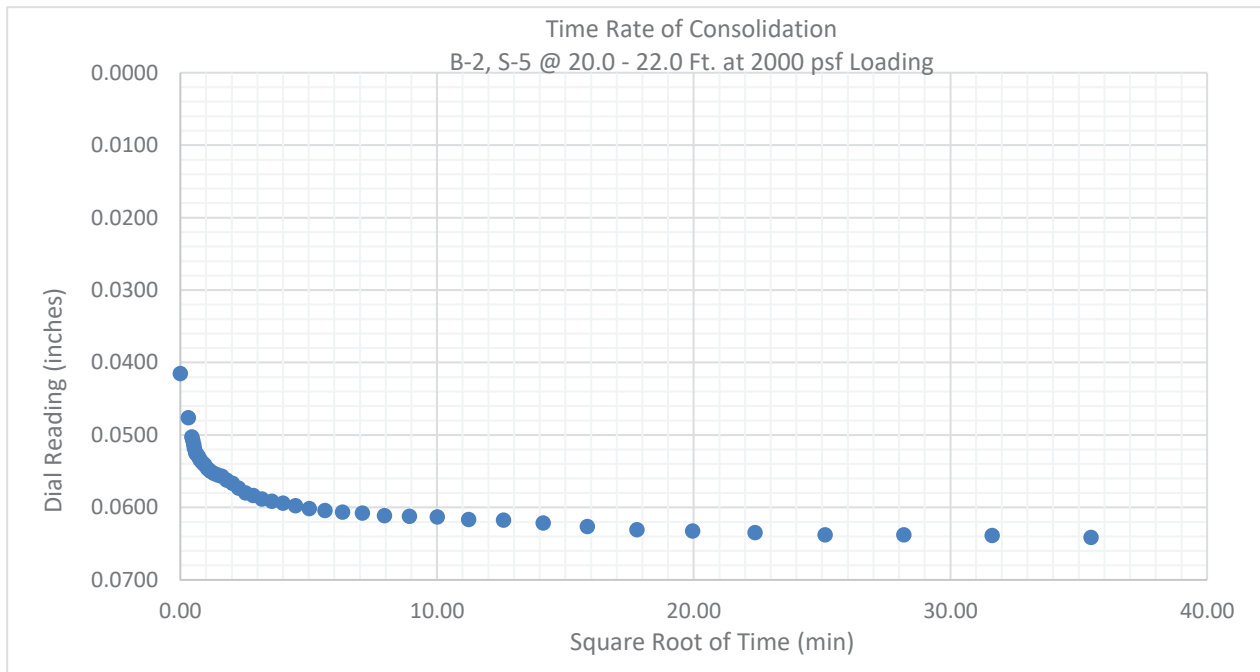
Report To: Joshua Robles
Pali Consulting, Inc.
1120 SW Fifth Avenue, Suite 1302
Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1



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TECHNICAL REPORT

Report To: Joshua Robles
 Pali Consulting, Inc.
 1120 SW Fifth Avenue, Suite 1302
 Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1

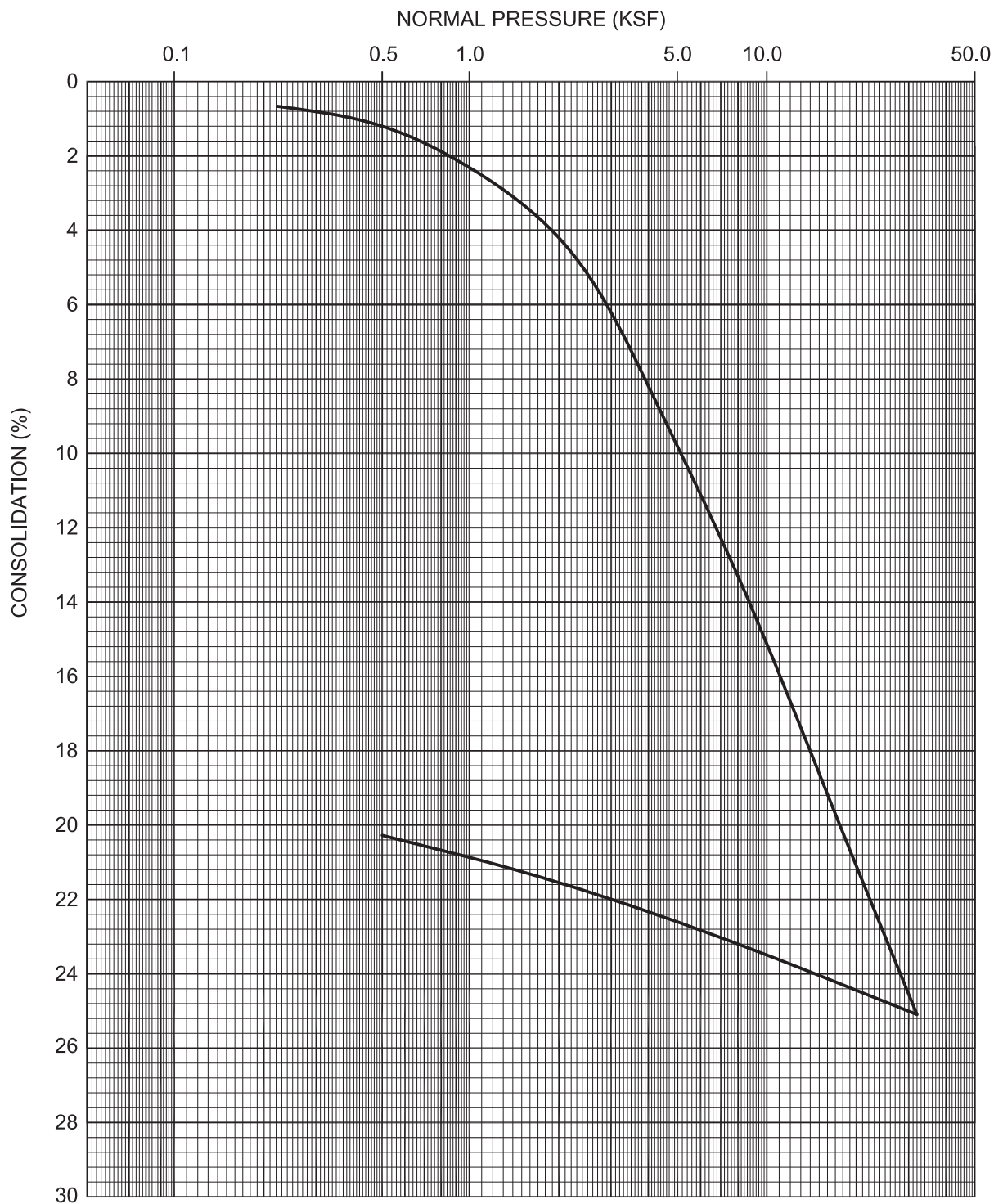
Sample ID: B-3, S-5 @ 15.0-17.0 Ft.

One Dimensional Consolidation of Soil (ASTM D2435)			
Test		Initial Conditions	Final Conditions
Moisture Content, (%)		45.5	32.2
Dry Unit Weight, (pcf)		74.5	89.1
Height of Specimen, (inches)		1.0000	0.7963
Load (ksf)	Dial Reading (inches)	Load (ksf)	Dial Reading (inches)
Initial	0.0009	8.0	0.1909
0.25	0.0060	16.0	0.2504
0.5	0.0115	32.0	0.2328
1.0	0.0419	8.0	0.2171
2.0	0.0810	2.0	0.1513
4.0	0.1345	0.5	0.1405

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SHEET 4 of 9 **REVIEWED BY: Mitchell Guha**

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SYMBOL	SAMPLE LOCATION	NORMAL PRESSURE AT SATURATION (KSF)
	B-3, S-5 @ 15.0 - 17.0 FT.	0.1

CONSOLIDATION TEST RESULTS - ASTM D2435

PROJECT NO. 00-223425-1

WASHINGTON STREET
PALI CONSULTING, INC.

LAB NO. 24-092

TECHNICAL REPORT

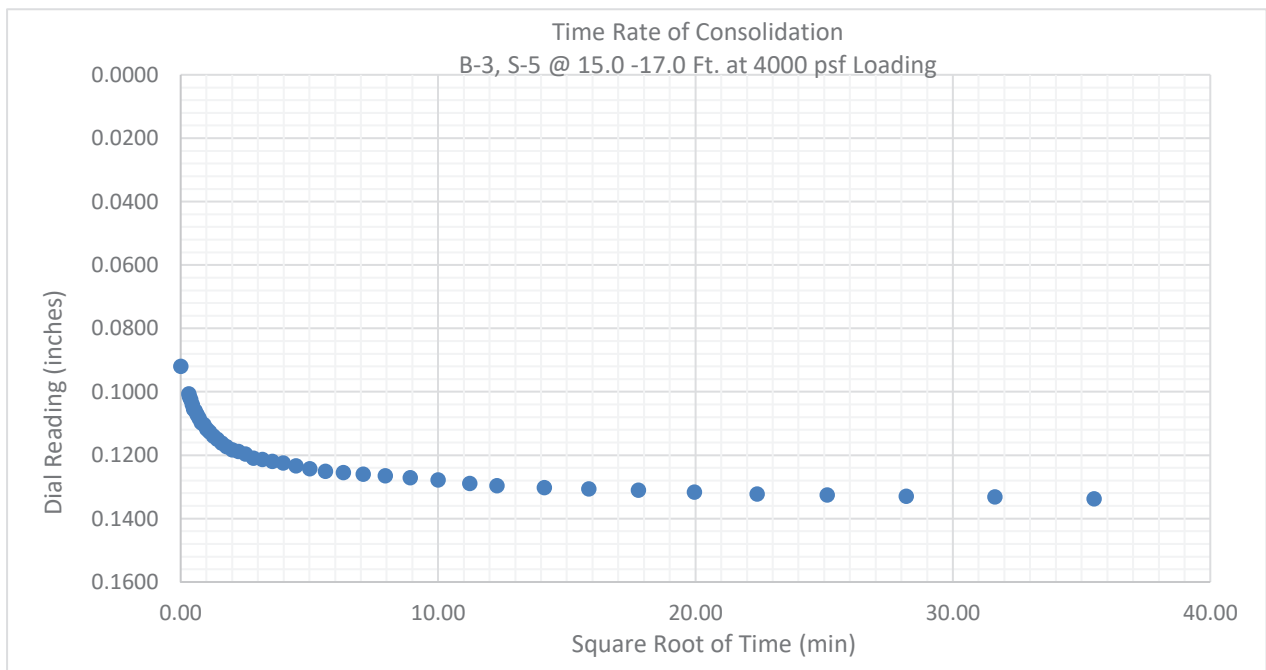
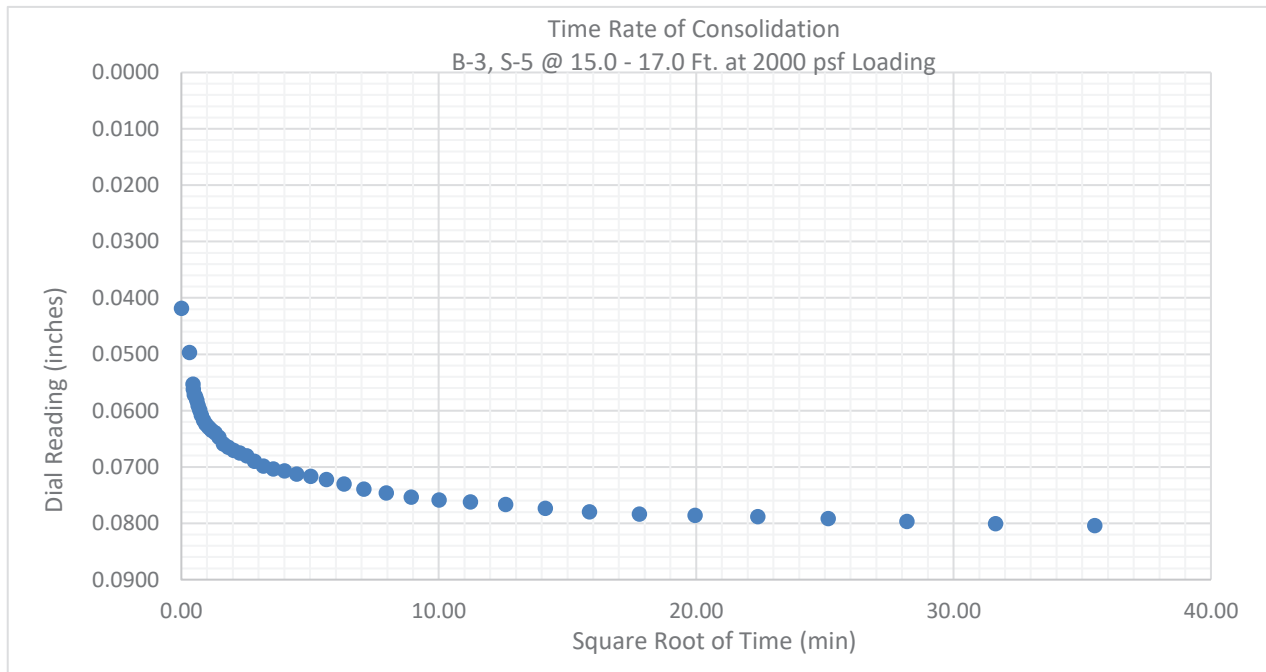
Report To: Joshua Robles
Pali Consulting, Inc.
1120 SW Fifth Avenue, Suite 1302
Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1



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SHEET 6 of 9

REVIEWED BY: Mitchell Guha

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TECHNICAL REPORT

Report To: Joshua Robles
 Pali Consulting, Inc.
 1120 SW Fifth Avenue, Suite 1302
 Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1

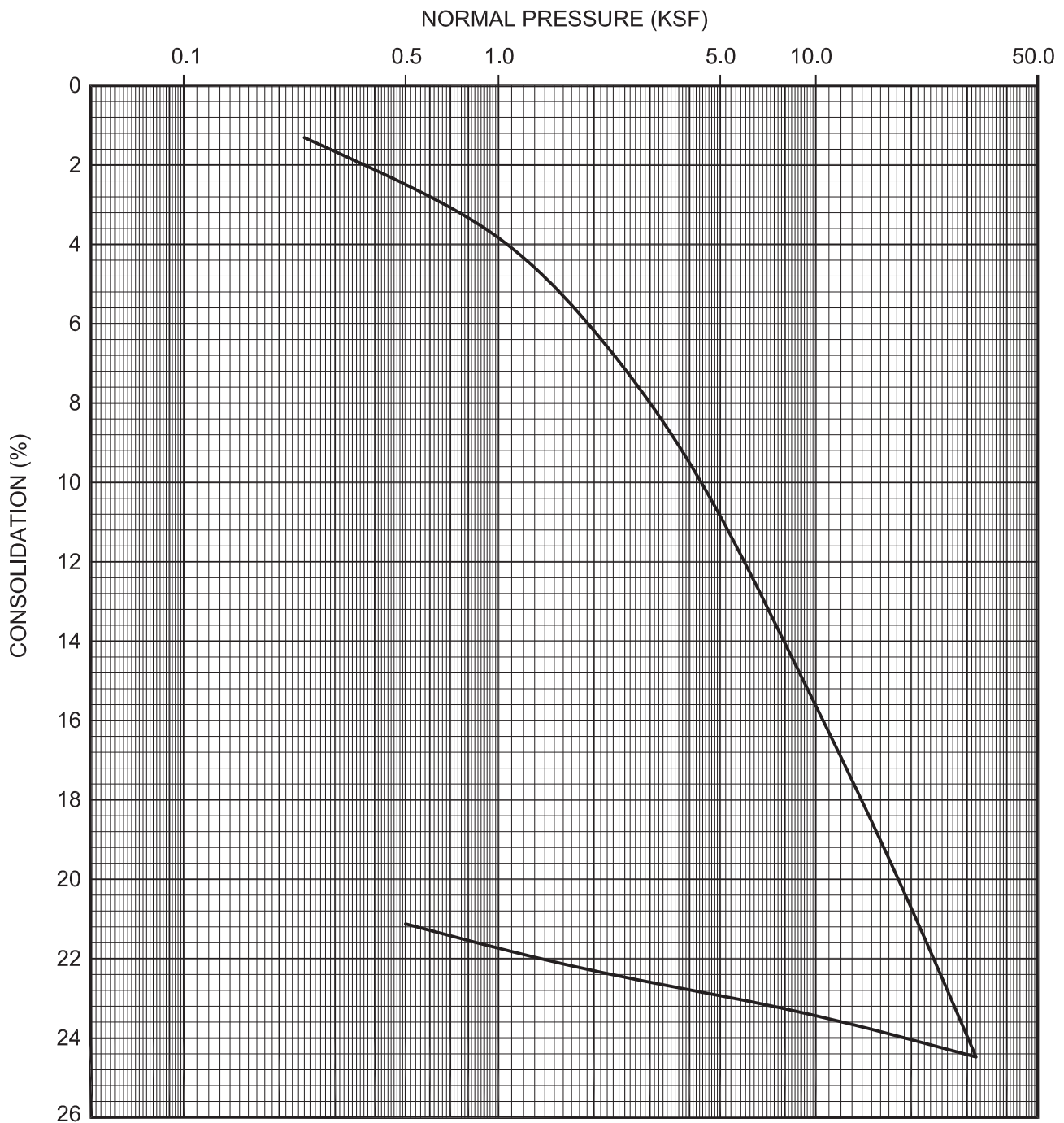
Sample ID: B-5, S-8 @ 21.5-23.5 Ft.

One Dimensional Consolidation of Soil (ASTM D2435)			
Test		Initial Conditions	Final Conditions
Moisture Content, (%)		50.2	33.1
Dry Unit Weight, (pcf)		69.4	89.6
Height of Specimen, (inches)		1.000	0.7872
Load (ksf)	Dial Reading (inches)	Load (ksf)	Dial Reading (inches)
Initial	0.0020	8.0	0.1405
0.25	0.0149	16.0	0.1902
0.5	0.0250	32.0	0.2440
1.0	0.0398	8.0	0.2332
2.0	0.0613	2.0	0.2235
4.0	0.0963	0.5	0.2128

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SHEET 7 of 9 **REVIEWED BY: Mitchell Guha**

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SYMBOL	SAMPLE LOCATION	NORMAL PRESSURE AT SATURATION (KSF)
—	B-5, S-8 @ 21.5 - 23.5 FT.	0.1

CONSOLIDATION TEST RESULTS - ASTM D2435

PROJECT NO. 00-223425-1

WASHINGTON STREET
PALI CONSULTING, INC.

LAB NO. 24-092

TECHNICAL REPORT

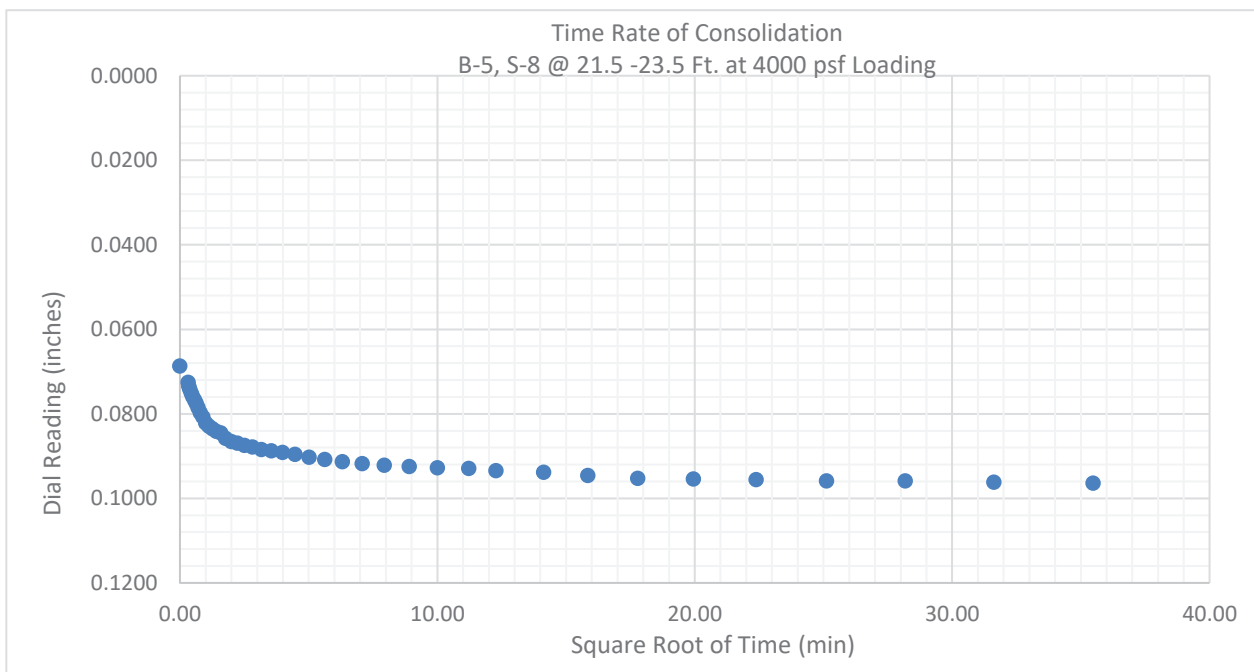
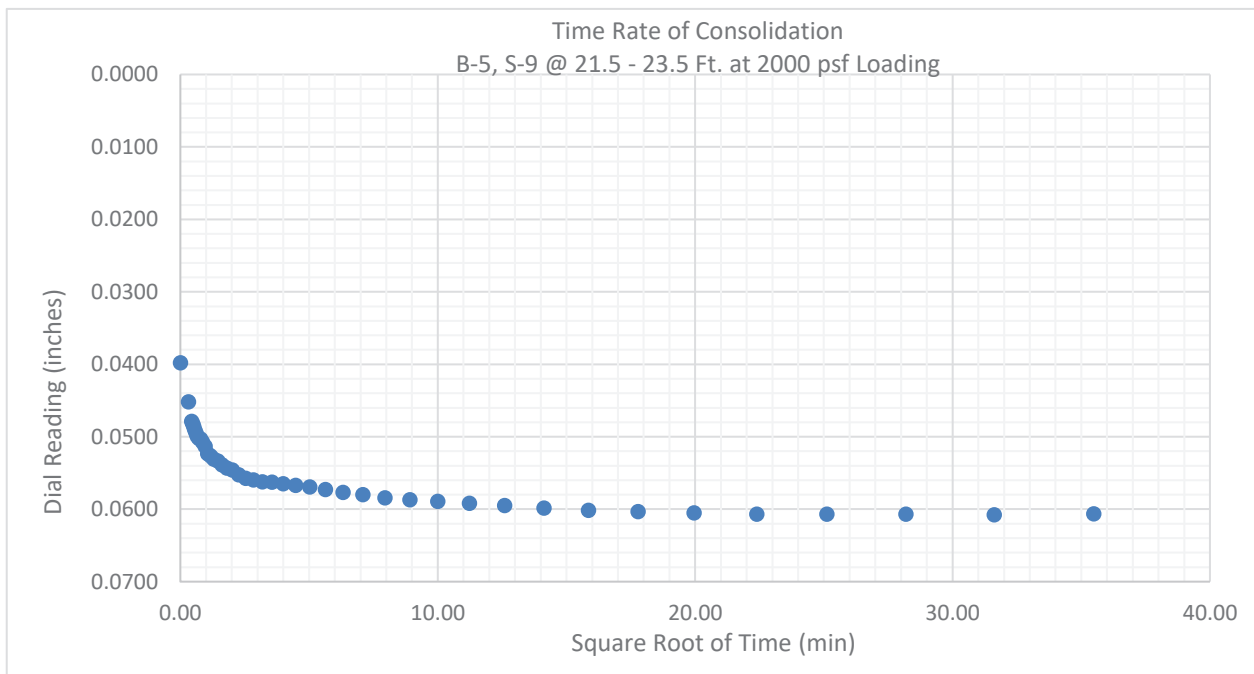
Report To: Joshua Robles
Pali Consulting, Inc.
1120 SW Fifth Avenue, Suite 1302
Portland, Oregon 97204

Date: 5/29/2024

Lab No.: 24-092

Project: Washington St. (082-23-004)

Project No.: 00-223425-1



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SHEET 9 of 9

REVIEWED BY: Mitchell Guha

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CITY OF OREGON CITY

625 Center Street
Oregon City, OR 97045
503-657-0891

Staff Report

To: Urban Renewal Commission **Agenda Date:** July 17, 2024
From: James Graham, Economic Development Manager

SUBJECT:

Item 3.b. - Stimson Property – Appraiser Review and Recommendation

STAFF RECOMMENDATION:

Staff recommends that Portland Valuation be approved to conduct the appraisal work on the Stimson Property because it has done appraisal work specifically for urban renewal projects in the local “sub-metro market”; the proposed appraisal work is competitively and responsibly priced; and the firm is relatively small and therefore, is most likely to be more responsive to needs of the Urban Renewal Commission (“URC”).

EXECUTIVE SUMMARY:

On March 6, 2024, the Urban Renewal Commission directed staff to proceed with obtaining an appraisal for the Stimson Property. On June 5, 2024, staff presented a draft request for proposals (“RFP”) document to identify an appraiser for the Stimson property. In addition to determining the appraised value of the property, a report will be submitted that provides a commercial economic analysis or valuation of probable uses of the property, including a hotel. Staff received a total of six responses to the RFP.

BACKGROUND:

On March 6, 2024, the URC directed staff to proceed with obtaining an appraisal for the Stimson Property. Previously, the URC approved staff to obtain an environmental assessment as well as a geotechnical report. The intent behind obtaining these reports is to better inform the appraisal process.

On June 5, 2024, staff presented to the Urban Renewal Commission a draft request for proposals (“RFP”) document for an appraisal of the Stimson Property. In addition to determining the appraised value of the property, a report will be submitted that provides a commercial economic analysis or valuation of probable uses for the property, including a hotel.

The URC approved the draft RFP, and staff distributed the document to the marketplace. The RFQ required all proposals to be in by 5:00 pm on Thursday, June 27, 2024. It was projected that all proposals would be reviewed, and a decision made by July 17, 2024.

Staff received a total of six responses to the RFP. All responses were carefully reviewed by the staff. The respondents to the RFP include the following:

- Portland Valuation Group, based in Sherwood, OR

- BBC Real Estate Services, Dallas, TX (field office in Seattle, WA)
- Moscato, Okoneski & Associates, Inc, Portland, OR
- CBRE Valuation & Advisory Services, Dallas, TX
- Valbridge Property Advisors, Portland, OR
- BDO USA, LLP, (field office in Seattle, WA)

Included in this report is a comparative review of the RFP responses submitted. After careful review staff narrowed down the field to two firms:

- Portland Valuation Group
- Moscato, Okoneski & Associates, Inc.

Both firms have done more work than their competitors with the local “sub-metro market” i.e., Sherwood, Wilsonville, Happy Valley, Lake Oswego, and Oregon City. The appraisal work of both companies are competitively priced. Further, both businesses are relatively small and therefore, are most likely to be more responsive to our needs.

Staff recommends that Portland Valuation be approved to conduct the appraisal work on the Stimson Property because it has done appraisal work specifically with urban renewal projects. The company also sights its relationship with developers and engineers relative to examining real estate values and feasibility of proposed redevelopment projects of mixed use lands, subdivision lands, commercial lands, and industrial lands.

OPTIONS:

1. Approve Portland Valuation as the appraiser for the Stimson property.
2. Do not choose Portland Valuation as the appraiser for the Stimson property and choose another company.

BUDGET IMPACT:

Amount	\$5,950.00
Fiscal Year(s):	2024/2025
Funding Source(s):	Urban Renewal Agency

**REQUEST FOR PROPOSALS (RFP)
REAL ESTATE APPRAISAL & COMMERCIAL ECONOMIC
ANALYSIS PROFESSIONAL SERVICES
OREGON CITY
EcDev2024.3**



James N Graham, CEcD, Economic Development Manager, Oregon City

Urban Renewal Agency of Oregon City
625 Center Street
Oregon City, OR 97045

Phone: 503-496-1552
Email: jngram@oregoncity.org

REQUEST FOR PROPOSALS (RFP)

REAL ESTATE APPRAISAL & COMMERCIAL ECONOMIC ANALYSIS PROFESSIONAL SERVICES

OREGON CITY

EcDev2024.3

INTRODUCTION

The Urban Renewal Agency of Oregon City (“URA”) is soliciting proposals from qualified appraisers and/or appraisal firms for the provision of real estate appraisal services. The types of services that are the subject of this Request for Proposal (“RFP”) include appraisal and commercial economic analysis of real property. The objective of this RFP is to identify an appraiser or appraisal firm (hereinafter identified as “Proposer(s)”) with the required experience, expertise, and capacity to provide the described services. The URA’s intention is to enter into a Professional Services Agreement (“PSA”) with a selected Proposer. If an award is made, the resulting PSA shall be for approximately five (5) months for a specific parcel of commercial real estate (**The Stimson Property**, see site map **Exhibit 1**). The URA may, at its sole discretion, terminate its PSAs sooner than the expiration of the term specified.

Qualified appraisers or appraisal firms are invited to submit a written proposal describing their qualifications and relevant experience for consideration. Consultants are expected to provide the services and deliverables identified in the Scope of Work (“SOW”) as described in Section IV below. Qualified appraiser consultant(s) may be invited to make a presentation or participate in an oral interview. Evaluation will be based on the submissions of the qualified proposal and, if applicable, the presentation and/or oral interview.

BACKGROUND -URBAN RENEWAL

Urban Renewal is an economic development tool used by local governments across the country. More specifically, it is a method to revitalize areas of “blight” through public investments that stimulate private development. Examples of blight include buildings that are unsafe or unfit for occupancy, inadequate streets, or environmentally contaminated areas. Due to these conditions, private real estate developers, property owners or business owners are unable to generate a sufficient profit on potential development in the area. As a result, private investment stalls and the blighted conditions remain.

Public investment is sometimes necessary to support and enable private investment. Public investments might include improving roads and infrastructure, technical and financial assistance to developers, or enhancing community amenities. Once private development becomes financially feasible, investment returns to the area.

Once private development becomes feasible, investment returns to the area. As physical and economic conditions improve over time, further private investment is stimulated, and the local economy is strengthened. The economic vitality, livability, and environmental sustainability of the wider city are often improved by Urban Renewal investments.

The Urban Renewal District/Area

Oregon City has one urban renewal area, the Downtown/Northend URA. The URA includes Downtown Oregon City, Singer Hill Road and High Street in the Historic McLoughlin area, the area around The Cove and Abernathy Road to Highway 213. Please refer to the Downtown/Northend URA site map (**Exhibit 2**).

The Urban Renewal Agency

The Agency is a separate legal entity from the City of Oregon City that is established under State law. Oregon Revised Statutes Chapter 457.035(1) creates “a public body corporate and politic to be known as the urban renewal agency” for each municipality. The Oregon City Urban Renewal Commission is responsible for providing oversight for the District as specified in the Downtown/North End Urban Renewal Plan, amended in January 2023.

The Urban Renewal Commission

On October 5, 1983, Ordinance No. 83-1014 created the Oregon City Urban Renewal Board, composed of seven members appointed by the Mayor. Over the years a variety of changes were made in the composition of the URA Commission as well as some of its functions and authority. Nevertheless, the URA Commission is comprised of seven members, five are existing City Commission members and two are from the public at large.

The Urban Renewal Commission approved the 11th amendment to the Urban Renewal Plan on December 21, 2022. This amendment updated the project plan to three primary projects, which are the Rossman Landfill, Clackamette Cove, and the Stimson Property, and several secondary projects, including the County Courthouse on Main Street, Improvements to the End of the Oregon Trail Interpretive Center, and downtown railroad Quiet Zone, and development of the vacant 12th and Main Street property.



James N Graham, CEcD, Economic Development Manager, Oregon City
625 Center Street
Oregon City, OR 97045

Real Estate Appraisal & Commercial Economic Analysis Professional Services

Section I. GENERAL GUIDELINES AND STIPULATIONS

The anticipated contract start date is **August 1, 2024**, with a contract duration of approximately 5 months. The Proposers shall assume responsibility for all contractual matters and services outlined in their proposal.

Proposals must be received by **5:00 pm on June 27, 2024**, at the City of Oregon City, Economic Development Department, Attn:

Urban Renewal Agency, City of Oregon City
c/o James Graham, Economic Development Department
625 Center Street
Oregon City, Oregon 97045-0304

It is projected that proposals will be reviewed and approved by **July 17, 2024**.

Section II. ELECTRONIC SUBMITTAL

The URA allows and will accept electronic submittals, in lieu of an official paper submittal.

a. Electronic submittals are to be e-mailed to the Economic Development Manager's email address on or before the deadline (jgraham@orccity.org).

b. Title the e-mail with the label, Appraiser RFP.

c. Any risks associated with ensuring the timely response to this RFP are borne by the respondent. The URA will send a confirmation email.

d. The URA e-mail system will generally allow documents up to, but no larger than, 10 megabytes.

e. If the Proposers also submits a hard copy, the URA will determine which form takes precedence in the event of discrepancies.

Inquiries shall be directed to James Graham, Economic Development Manager, by phone (503) 496-1552 or email (jgraham@orccity.org). Verbal statements made by representatives of the municipal government are not binding unless confirmed in writing.

Proposers are responsible for ensuring that their contact information is correct and that email updates are being received and not being sent to spam folders. Hence, the URA is not responsible for the failure of the Proposer to receive notifications of any changes or corrections made.

An authorized representative of the responding consultant must sign the proposal and their name and title must appear below the person's signature. Signing the proposal certifies that:

- a. the person has the legal authority to do so on behalf of the responding firm;
- b. no employee of The City of Oregon City, or URA, or any partnership or corporation in which the URA has an interest, will or has received any remuneration of any description either directly or indirectly, in connection with the approval or performance of resulting from this RFP;
- c. the statements contained in the proposal are true and complete to the best of the Proposer's knowledge;
- d. the URA reserves the right to waive any minor irregularity, informality, or non-conformity with the provisions or procedures of this RFP, and to seek clarification from the respondent if required;
- e. the URA reserves the right to accept or reject any and all proposals in whole or in part, to waive any and all informalities and to disregard all non-conforming, non-responsive or conditional proposals.
- f. that respondents understand that by submitting this RFP, the URA does not commit to pay any costs incurred by the Proposer's submission or presentation to this RFP, or in making necessary preparation thereof;
- g. questions regarding this project proposal must be submitted to jgraham@orc.org in writing and that necessary, interpretations or clarifications in response to questions will be made by issuance of an "Addendum" to all responding consultants within a reasonable time prior to proposal closing, but in no case less than 72 hours before the proposal closing; and
- h. if an addendum is necessary, the URA, at its discretion, can extend the closing date;
- i. only questions answered by formal written addenda will be binding; oral and other interpretations or clarifications will be without legal effect; and
- j. the Proposer understands that late proposals will not be accepted.

All proposals become part of the public file for the project, without obligation to the City of Oregon City or the URA. The URA may cancel the procurement or reject any or all proposals in accordance with ORS 279B.100. In such an event, the URA or the City are not liable for any costs incurred by the Proposer in the preparation or presentation of the proposal.

Section III. QUALIFICATIONS OF PROPOSER(S)

Each Proposer shall provide a statement of qualifications which shall not exceed ten (10) pages (including resumes). This page limit applies only to the statement of qualifications, and does not apply to the Proposal.

The statement of qualifications shall include the following:

- a. Copies of certifications and licenses of the Proposer(s) to provide appraisal services in the State of Oregon.
- b. A cover letter from a person within the firm who is authorized to make representations on behalf of the firm and to bind the firm.
- b. Brief history and description of the Proposer submitting the proposal.
- c. Identification of the Proposer's professional staff members who will be assigned to this engagement if the Proposer's proposal is selected. Include a resume for each such professional staff member that details qualifications, years and types of experience, education, accomplishments, etc.
- d. The cost of fee for the requested services.

Section IV. SCOPE OF SERVICES

The Economic Development Department of Oregon City seeks proposals from qualified appraisal consulting firms or appraiser consultants that will conduct a new appraisal report that considers multiple appraisal approaches including sales comparison, cost, and income.

The appraiser consultant(s) shall review and analyze real property data including:

- a. Property boundaries
- b. Right of way, easements, and relevant agreements
- c. Circulation, access, traffic reports
- d. Adjacent land uses
- e. Allowable land uses including zoning and other policy restrictions
- f. Environmental Assessment Data
- g. Geo-Technical Services Data
- h. Market Data

Section V. DELIVERABLES

- a. A draft report should be written for the URA's review, a revision to the draft, and a final report should be part of the process.
- b. The final report should include a written narrative and graphic illustrations, as applicable.
- c. The appraisal will include an executive summary which provides a high-level summary of methods used, and rationale for determination of probable property uses.
- d. The appraiser consultants are expected to develop and present an appraisal of probable uses (especially a hotel) for the subject property, applying the standards of recognized professional appraisal organizations such as the Member Appraisal Institute ("MAI") and Uniform Standards of Professional Appraisal Practice ("USPAP").
- e. The executive summary will be written in a logical, sequential manner to provide a clear rationale for the appraiser's determination of probable uses and market values; this summary should be easily understood to non-real estate professionals reading the report.
- f. The narrative report should include clearly labeled tables that summarize written explanations of data analysis.
- g. A hard copy and an electronic version of the final appraisal report must be submitted.

Section VI. TERM OF CONTRACT

Following the selection of an appraiser consultant or consulting firm, the Economic Development Manager and/or designee will negotiate a Professional Service Agreement ("PSA"). A sample Professional Services Agreement included in this document (**Exhibit 3**). The contract period for the service contemplated by this RFP will be for approximately five (5) months and shall commence on or about the Effective Date of the executed contract agreement. The URA reserves the right to terminate the contract at any time, with or without cause, upon thirty (30) days written notice.

Section V. BUSINESS LICENSE/FEDERAL ID REQUIRED

Once selected, a City of Oregon City Business License is required. Chapter 5.04 of the City Code states no person shall do business within the City without a current, valid City license. No contracts shall be signed prior to the obtaining of the City of Oregon City Business License. **(Exhibit 4)**

ATTACHMENTS

- Exhibit 1: Stimson Property Site Map
- Exhibit 2: Urban Renewal District Site Map
- Exhibit 3: Standard Professional Services Agreement (“PSA”)
- Exhibit 4: Business License Application

CLARK HAS CURRENTLY SERVED
 17 YEARS 11 MONTHS
 ACCORDING TO THE
 2004-2005 YEAR

CLARK HAS CURRENTLY SERVED
RECEIVED 11/21/2013
ADDRESS FROM 10/21/2013
BUTLER COUNTY 10/21/2013

SITUATED IN THE GEORGE ABERNETHY D.L.C. NO. 3A AND THE HIRAN STRAIGHT D.L.C. NO. 42 AND THE NORTHEAST AND SOUTHWEST ONE-QUARTER SECTION 7 IN TOWNSHIP 3 SOUTH AND RANGE 2 EAST OF THE WILLABETTE MERIDIAN.
CITY OF OREGON CITY CLACKAMAS COUNTY, OREGON

OREGON CIT* IN ANNUAL FILE NO. 110400

DECEMBER 15, 2007



STIMSON

200 3.000 10 1/2
 200 3.000 10 1/2
 200 3.000 10 1/2
 200 3.000 10 1/2

[illegible]

THE ASSUMPTION OF THIS MODEL IS THAT DETACHMENT IS PROPORTIONAL TO THE NUMBER OF UNPAID TAXES ON PROPERTY. THE TAXES OF PARCELS 2, 3, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 162, 163, 164, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 177, 178, 179, 180, 181, 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192, 193, 194, 195, 196, 197, 198, 199, 200, 201, 202, 203, 204, 205, 206, 207, 208, 209, 210, 211, 212, 213, 214, 215, 216, 217, 218, 219, 220, 221, 222, 223, 224, 225, 226, 227, 228, 229, 230, 231, 232, 233, 234, 235, 236, 237, 238, 239, 240, 241, 242, 243, 244, 245, 246, 247, 248, 249, 250, 251, 252, 253, 254, 255, 256, 257, 258, 259, 260, 261, 262, 263, 264, 265, 266, 267, 268, 269, 270, 271, 272, 273, 274, 275, 276, 277, 278, 279, 280, 281, 282, 283, 284, 285, 286, 287, 288, 289, 290, 291, 292, 293, 294, 295, 296, 297, 298, 299, 300, 301, 302, 303, 304, 305, 306, 307, 308, 309, 310, 311, 312, 313, 314, 315, 316, 317, 318, 319, 320, 321, 322, 323, 324, 325, 326, 327, 328, 329, 330, 331, 332, 333, 334, 335, 336, 337, 338, 339, 340, 341, 342, 343, 344, 345, 346, 347, 348, 349, 350, 351, 352, 353, 354, 355, 356, 357, 358, 359, 360, 361, 362, 363, 364, 365, 366, 367, 368, 369, 370, 371, 372, 373, 374, 375, 376, 377, 378, 379, 380, 381, 382, 383, 384, 385, 386, 387, 388, 389, 390, 391, 392, 393, 394, 395, 396, 397, 398, 399, 400, 401, 402, 403, 404, 405, 406, 407, 408, 409, 410, 411, 412, 413, 414, 415, 416, 417, 418, 419, 420, 421, 422, 423, 424, 425, 426, 427, 428, 429, 430, 431, 432, 433, 434, 435, 436, 437, 438, 439, 440, 441, 442, 443, 444, 445, 446, 447, 448, 449, 450, 451, 452, 453, 454, 455, 456, 457, 458, 459, 460, 461, 462, 463, 464, 465, 466, 467, 468, 469, 470, 471, 472, 473, 474, 475, 476, 477, 478, 479, 480, 481, 482, 483, 484, 485, 486, 487, 488, 489, 490, 491, 492, 493, 494, 495, 496, 497, 498, 499, 500, 501, 502, 503, 504, 505, 506, 507, 508, 509, 510, 511, 512, 513, 514, 515, 516, 517, 518, 519, 520, 521, 522, 523, 524, 525, 526, 527, 528, 529, 530, 531, 532, 533, 534, 535, 536, 537, 538, 539, 540, 541, 542, 543, 544, 545, 546, 547, 548, 549, 550, 551, 552, 553, 554, 555, 556, 557, 558, 559, 560, 561, 562, 563, 564, 565, 566, 567, 568, 569, 570, 571, 572, 573, 574, 575, 576, 577, 578, 579, 580, 581, 582, 583, 584, 585, 586, 587, 588, 589, 590, 591, 592, 593, 594, 595, 596, 597, 598, 599, 600, 601, 602, 603, 604, 605, 606, 607, 608, 609, 610, 611, 612, 613, 614, 615, 616, 617, 618, 619, 620, 621, 622, 623, 624, 625, 626, 627, 628, 629, 630, 631, 632, 633, 634, 635, 636, 637, 638, 639, 640, 641, 642, 643, 644, 645, 646, 647, 648, 649, 650, 651, 652, 653, 654, 655, 656, 657, 658, 659, 660, 661, 662, 663, 664, 665, 666, 667, 668, 669, 670, 671, 672, 673, 674, 675, 676, 677, 678, 679, 680, 681, 682, 683, 684, 685, 686, 687, 688, 689, 690, 691, 692, 693, 694, 695, 696, 697, 698, 699, 700, 701, 702, 703, 704, 705, 706, 707, 708, 709, 710, 711, 712, 713, 714, 715, 716, 717, 718, 719, 720, 721, 722, 723, 724, 725, 726, 727, 728, 729, 730, 731, 732, 733, 734, 735, 736, 737, 738, 739, 740, 741, 742, 743, 744, 745, 746, 747, 748, 749, 750, 751, 752, 753, 754, 755, 756, 757, 758, 759, 760, 761, 762, 763, 764, 765, 766, 767, 768, 769, 770, 771, 772, 773, 774, 775, 776, 777, 778, 779, 780, 781, 782, 783, 784, 785, 786, 787, 788, 789, 790, 791, 792, 793, 794, 795, 796, 797, 798, 799, 800, 801, 802, 803, 804, 805, 806, 807, 808, 809, 810, 811, 812, 813, 814, 815, 816, 817, 818, 819, 820, 821, 822, 823, 824, 825, 826, 827, 828, 829, 830, 831, 832, 833, 834, 835,

WESTINGHOUSE

PL 3 40119

25. Bc41

1. *W. B. Davis*

1

21

Oregon City Urban Renewal District Boundaries

Downtown Oregon City/North
End Urban Renewal District.

855 acres including

- Downtown
- Clackamette Cove
- Landfill redevelopment site
- Washington/7th Street corridor
- Heritage Center area

Oregon City Urban Renewal Study | 10/29/20 Community Meeting

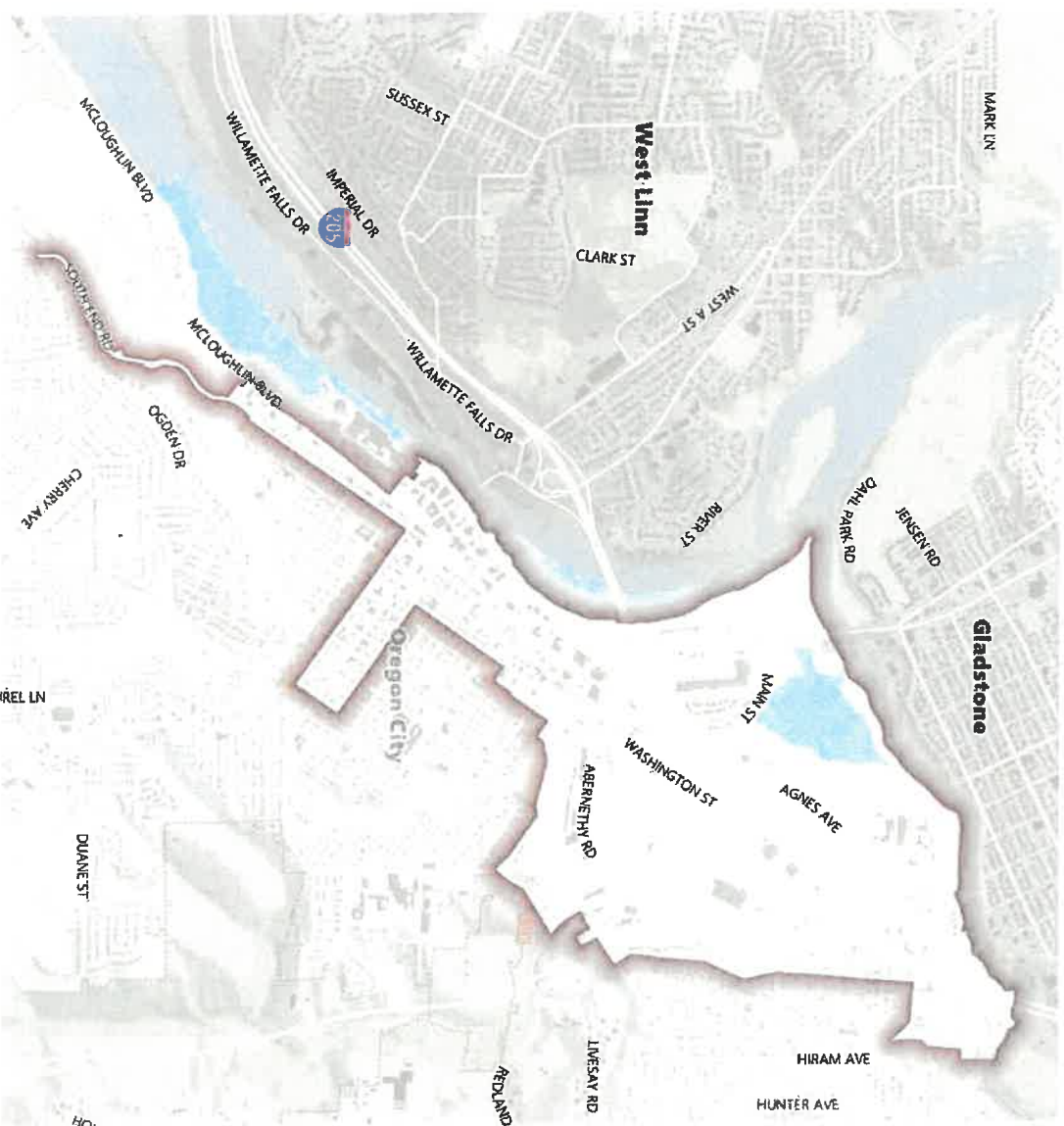


EXHIBIT 3

Point of Contact: James Graham, Economic Development Manager
Term of Contract: _____

EXHIBIT 2

URBAN RENEWAL COMMISSION PERSONAL SERVICES AGREEMENT

This PERSONAL SERVICES AGREEMENT ("Agreement") is entered into between the Urban Renewal Commission of Oregon City ("URC") and _____ ("Consultant").

RECITALS

A. URC requires services that Consultant is capable of providing under the terms and conditions hereinafter described.

B. Consultant is able and prepared to provide such services as URC requires under the terms and conditions hereinafter described.

The parties agree as follows:

AGREEMENT

1. Term. The term of this Agreement shall be from _____ until _____, unless sooner terminated pursuant to provisions set forth below. However, such expiration shall not extinguish or prejudice URC's right to enforce this Agreement with respect to (i) breach of any warranty; or (ii) any default or defect in Consultant's performance that has not been cured.

2. Compensation. Total compensation for services provided shall be \$_____.

3. Scope of Services. Consultant will conduct the work associated with this agreement within the area as depicted in **Attachment B**. Consultant's services under this Agreement shall consist of the following services: _____

4. Standard Conditions. This Agreement shall include all of the standard conditions as detailed in **Exhibit A**, attached hereto and by this reference incorporated herein.

5. Integration. This Agreement, along with the scope of services to be performed herein and, where applicable, the Standard Conditions to URC's Personal Services Agreement attached as **Exhibit A**, contain the entire agreement between and among the parties, integrate all the terms and conditions mentioned herein or incidental hereto, and supersede all prior written or oral discussions or agreements between the parties or their predecessors-in-interest with respect to all or any part of the subject matter hereof.

6. Notices. Any notices, reports or other documents required by this Agreement shall be sent by the parties by United States mail, postage prepaid, or personally delivered to the addresses below. All notices shall be in writing and shall be effective when delivered. If mailed, notices shall be deemed effective forty-eight (48) hours after mailing, unless sooner received. Bills and invoices may be sent by e-mail or United States mail.

To the Urban Renewal Commission:

Urban Renewal Commission
PO Box 3040
625 Center Street
Oregon City, OR 97045
Attention: Economic Development Manager

To Consulting Firm: _____

Consultant shall be responsible for providing the URC with a current address. Either party may change the address set forth above for purposes of notices under this Agreement by providing notice to the other party in the manner set forth above.

7. Governing Law. This Agreement shall be governed and construed in accordance with the laws of the state of Oregon without resort to any jurisdiction's conflicts of law, rules or doctrines.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly appointed officers on this _____ day of _____, 20____.

Urban Renewal Commission

Consulting Firm

By: _____
Anthony J. Konkol, III
Title: Executive Director

By: _____
Title:

DATED: _____, 20____.

DATED: _____, 20____.

By: _____
James N. Graham, CEcD
Title: Economic Development Manager

**STANDARD CONDITIONS TO URBAN RENEWAL COMMISSION ("URC")
PERSONAL SERVICES AGREEMENT**

EXHIBIT A

1. Consultant Identification. Consultant shall furnish to Urban Renewal Commission ("URC") its taxpayer identification number, as designated by the Internal Revenue Service, or Consultant's social security number, as URC deems applicable.

2. Payment.

(a) Invoices submitted in connection with this Agreement shall be properly documented and shall identify the pertinent agreement and/or purchase order numbers.

(b) URC agrees to pay Consultant within thirty (30) days after receipt of Consultant's itemized statement. Amounts disputed by URC may be withheld pending settlement.

(c) URC certifies that sufficient funds are available and authorized for expenditure to finance the cost of the services to be provided pursuant to this Agreement.

(d) URC shall not pay any amount in excess of the compensation amounts set forth in this Agreement, nor shall URC pay Consultant any fees or costs that URC reasonably disputes.

3. Independent Consultant Status.

(a) Consultant is an independent Consultant and is free from direction and control over the means and manner of providing labor or services, subject only to the specifications of the desired results.

(b) Consultant represents that it is customarily engaged in an independently established business and is licensed under ORS chapter 671 or 701, if the services provided require such a license. Consultant maintains a business location that is separate from the offices of the URC and bears the risk of loss related to the business as demonstrated by the fixed price nature of the contract, requirement to fix defective work, warranties provided and indemnification and insurance provisions of this Agreement. Consultant provides services for two or more persons within a 12-month period or routinely engages in advertising, solicitation or other marketing efforts. Consultant makes a significant investment in the business by purchasing tools or equipment, premises or licenses, certificates or specialized training and

Consultant has the authority to hire or fire persons to provide or assist in providing the services required under this Agreement.

(c) Consultant is responsible for obtaining all assumed business registrations or professional occupation licenses required by state or local law (including applicable URC or Metro business licenses as per Oregon URC Municipal Code Chapter 5.04). Consultant shall furnish the tools or equipment necessary for the contracted labor or services. Consultant agrees and certifies that:

(d) Consultant is not eligible for any federal social security or unemployment insurance payments. Consultant is not eligible for any PERS or workers' compensation benefits from compensation or payments made to Consultant under this Agreement.

(e) Consultant agrees and certifies that it is licensed to do business in the State of Oregon and that, if Consultant is a corporation, it is in good standing within the State of Oregon.

4. Early Termination.

(a) This Agreement may be terminated without cause prior to the expiration of the agreed-upon term by mutual written consent of the parties or by the URC upon ten (10) days written notice to the Consultant, delivered by certified mail, email, or in person.

(b) Upon receipt of notice of early termination, Consultant shall immediately cease work and submit a final statement of services for all services performed and expenses incurred since the date of the last statement of services.

(c) Any early termination of this Agreement shall be without prejudice to any obligation or liabilities of either party already accrued prior to such termination.

(d) The rights and remedies of the URC provided in this Agreement and relating to defaults by Consultant shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Agreement.

5. No Third-Party Beneficiaries. URC and

**STANDARD CONDITIONS TO URBAN RENEWAL COMMISSION ("URC")
PERSONAL SERVICES AGREEMENT**

EXHIBIT A

Consultant are the only parties to this Agreement and are the only parties entitled to enforce its terms. Nothing in this Agreement gives, is intended to give, or shall be construed to give or provide, any benefit or right, whether directly or indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Agreement.

6. Payment of Laborers; Payment of Taxes.

(a) Consultant shall:

(i) Make payment promptly, as due, to all persons supplying to Consultant labor and materials for the prosecution of the services to be provided pursuant to this Agreement.

(ii) Pay all contributions or amounts due to the State Accident Insurance Fund incurred in the performance of this Agreement.

(iii) Not permit any lien or claim to be filed or prosecuted against the URC on account of any labor or materials furnished.

(iv) Be responsible for all federal, state, and local taxes applicable to any compensation or payments paid to the Consultant under this Agreement and, unless Consultant is subject to back-up withholding, the URC will not withhold from such compensation or payments any amount(s) to cover Consultant's federal or state tax obligation.

(v) Pay all employees at least time and one-half for all overtime worked in excess of forty (40) hours in any one week, except for individuals excluded under ORS 653.100 to 653.261 or under 29 U.S.C. §§ 201 to 209 from receiving overtime.

(b) If the Consultant fails, neglects or refuses to make prompt payment of any claim for labor or services furnished by any person in connection with this Agreement as such claim becomes due, the URC may pay such claim to the person furnishing the labor or services and shall charge the amount of the payment against funds due or to become due to the Consultant by reason of this Agreement.

(c) The payment of a claim in this manner shall not relieve Consultant or Consultant's surety from obligation with respect to any unpaid claims.

(d) Consultant and subconsultants, if any, are subject employers under the Oregon workers' compensation law and shall comply with ORS 656.017, which requires provision of workers' compensation coverage for all workers.

7. Subconsultants and Assignment.

Consultant shall neither subcontract any of the work, nor assign any rights acquired hereunder, without obtaining prior written approval from the URC. The URC, by this Agreement, incurs no liability to third persons for payment of any compensation provided herein to the Consultant.

8. Access to Records. URC shall have access to all books, documents, papers and records of Consultant that are pertinent to this Agreement for the purpose of making audits, examinations, excerpts and transcripts.

9. Ownership of Work Product; License. All work products of Consultant that result from this Agreement (the "Work Products") are the exclusive property of URC. In addition, if any of the Work Products contain intellectual property of Consultant that is or could be protected by federal copyright, patent, or trademark laws, or state trade secret laws, Consultant hereby grants URC a perpetual, royalty-free, fully paid, nonexclusive and irrevocable license to copy, reproduce, deliver, publish, perform, dispose of, use and re-use, in whole or in part (and to authorize others to do so), all such Work Products and any other information, designs, plans, or works provided or delivered to URC or produced by Consultant under this Agreement. The parties expressly agree that all works produced (including, but not limited to, any taped or recorded items) pursuant to this Agreement are works specially commissioned by URC, and that any and all such works shall be works made for hire in which all rights and copyrights belong exclusively to URC. Consultant shall not publish, republish, display or otherwise use any work or Work Products resulting from this Agreement without the prior written agreement of URC.

10. Compliance With Applicable Law.

**STANDARD CONDITIONS TO URBAN RENEWAL COMMISSION ("URC")
PERSONAL SERVICES AGREEMENT** **EXHIBIT A**

Consultant shall comply with all federal, state, and local laws and ordinances applicable to the services to be performed pursuant to this Agreement, including, without limitation, the provisions of ORS 279B.220, 279C.515, 279B.235, 279B.230 and 279B.270. Without limiting the generality of the foregoing, Consultant expressly agrees to comply with (i) Title VI of the Civil Rights Act of 1964; (ii) Section V of the Rehabilitation Act of 1973; (iii) the Americans With Disabilities Act of 1990 (Pub. L No. 101-336), ORS 659.425, and all regulations and administrative rules established pursuant to those laws; and (iv) all other applicable requirements of federal and state civil rights and rehabilitation and other applicable statutes, rules and regulations.

11. Professional Standards. Consultant shall be responsible to the level of competency presently maintained by others practicing in the same type of services in URC's community, for the professional and technical soundness, accuracy and adequacy of all services and materials furnished under this authorization.

12. Modification, Supplements or Amendments. No modification, change, supplement or amendment of the provisions of this Agreement shall be valid unless it is in writing and signed by the parties hereto.

13. Indemnity and Insurance.

(a) Indemnity. Consultant acknowledges responsibility for liability arising out of Consultant's negligent performance of this Agreement and shall hold URC, its officers, agents, Consultants, and employees harmless from, and indemnify them for, any and all liability, settlements, loss, costs, and expenses, including attorney fees, in connection with any action, suit, or claim caused or alleged to be caused by the negligent acts, omissions, activities or services by Consultant, or the agents, Consultants or employees of Consultant provided pursuant to this Agreement.

(b) Workers' Compensation Coverage. Consultant certifies that Consultant has qualified for workers' compensation as required by the State of Oregon. Consultant shall provide the Owner, within ten (10) days after execution of this Agreement, a certificate of insurance evidencing

coverage of all subject workers under Oregon's workers' compensation statutes. The insurance certificate and policy shall indicate that the policy shall not be terminated by the insurance carrier without thirty (30) days' advance written notice to URC. All agents or Consultants of Consultant shall maintain such insurance.

(c) Comprehensive, General, and Automobile Insurance. Consultant shall maintain comprehensive general and automobile liability insurance for protection of Consultant and URC and for their directors, officers, agents, and employees, insuring against liability for damages because of personal injury, bodily injury, death, and broad-form property damage, including loss of use, and occurring as a result of, or in any way related to, Consultant's operation, each in an amount not less than \$2,000,000 combined, single-limit, per-occurrence/annual aggregate. Such insurance shall name URC as an additional insured, with the stipulation that this insurance, as to the interest of URC, shall not be invalidated by any act or neglect or breach of this Agreement by Consultant.

14. Legal Expenses. In the event legal action is brought by URC or Consultant against the other to enforce any of the obligations hereunder or arising out of any dispute concerning the terms and conditions hereby created, the losing party shall pay the prevailing party such reasonable amounts for attorney fees, costs, and expenses as may be set by a court. "Legal action" shall include matters subject to arbitration and appeals.

15. Severability. The parties agree that, if any term or provision of this Agreement is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected.

16. Number and Gender. In this Agreement, the masculine, feminine or neuter gender, and the singular or plural number, shall be deemed to include the others or other whenever the context so requires.

17. Captions and Headings. The captions and headings of this Agreement are for convenience only and shall not be construed or referred to in resolving questions of interpretation or

**STANDARD CONDITIONS TO URBAN RENEWAL COMMISSION ("URC")
PERSONAL SERVICES AGREEMENT** **EXHIBIT A**

construction.

18. Hierarchy. The conditions contained in this document are applicable to every Personal Services Agreement entered into by the URC of Oregon URC in the absence of contrary provisions. To the extent there is a conflict, the terms of the Personal Services Agreement will control over the terms of the standard conditions. To the extent there is a conflict between the terms of the standard conditions and any other document, including the scope of services, the terms of the standard conditions shall control those other terms.

19. Calculation of Time. All periods of time referred to herein shall include Saturdays, Sundays and legal holidays in the State of Oregon, except that, if the last day of any period falls on any Saturday, Sunday or legal holiday, the period shall be extended to include the next day that is not a Saturday, Sunday or legal holiday.

20. Notices. Any notices, bills, invoices, reports or other documents required by this Agreement shall be sent by the parties by United States mail, postage prepaid, or personally delivered to the addresses listed in the Agreement attached hereto. All notices shall be in writing and shall be effective when delivered. If mailed, notices shall be deemed effective forty-eight (48) hours after mailing, unless sooner received.

21. Nonwaiver. The failure of URC to insist upon or enforce strict performance by Consultant of any of the terms of this Agreement or to exercise any rights hereunder shall not be construed as a waiver or relinquishment to any extent of its rights to assert or rely upon such terms or rights of any future occasion.

22. Information and Reports. Consultant shall, at such time and in such form as URC may require, furnish such periodic reports concerning the status of the project, such statements, certificates, approvals, and copies of proposed and executed plans and claims, and other information relative to the project as may be requested by URC. Consultant shall furnish URC, upon request, with copies of all documents and other materials prepared or developed in relation with or as a part of the project. Working papers prepared in

conjunction with the project are the property of URC, but shall remain with Consultant. Copies as requested shall be provided free of cost to URC.

23. URC's Responsibilities. URC shall furnish Consultant with all available necessary information, data, and materials pertinent to the execution of this Agreement. URC shall cooperate with Consultant in carrying out the work herein and shall provide adequate staff for liaison with Consultant.

24. Arbitration.

All disputes arising out of or under this Agreement shall be timely submitted to nonbinding mediation prior to commencement of any other legal proceedings. The subsequent measures apply if disputes cannot be settled in this manner.

(a) Any dispute arising out of or under this Agreement shall be determined by binding arbitration.

(b) The party desiring such arbitration shall give written notice to that effect to the other party and shall in such notice appoint a disinterested person of recognized competence in the field as arbitrator on its behalf. Within fifteen (15) days thereafter, the other party may, by written notice to the original party, appoint a second disinterested person of recognized competence as arbitrator on its behalf. The arbitrators thus appointed shall appoint a third disinterested person of recognized competence, and the three arbitrators shall, as promptly as possible, determine such matter, provided, however, that:

(i) If the second arbitrator is not appointed as described above, then the first arbitrator shall proceed to determine such matter; and

(ii) If the two arbitrators appointed by the parties are unable to agree, within fifteen (15) days after the second arbitrator is appointed, on the appointment of a third arbitrator, they shall give written notice of such failure to agree to the parties and, if the parties fail to agree on the selection of the third arbitrator within fifteen (15) days after the arbitrators appointed by the parties give notice, then, within ten (10) days thereafter, either of the parties, on written notice to the other party,

**STANDARD CONDITIONS TO URBAN RENEWAL COMMISSION ("URC")
PERSONAL SERVICES AGREEMENT** **EXHIBIT A**

may request such appointment by the presiding judge of the Clackamas County Circuit Court.

(c) Each party shall each be entitled to present evidence and argument to the arbitrators.

The determination of the majority of the arbitrators or the sole arbitrator, as the case may be, shall be conclusive on the parties, and judgment on the same may be entered in any court having jurisdiction over the parties. The arbitrators or the sole arbitrator, as the case may be, shall give written notice to the parties, stating the arbitration determination, and shall furnish to each party a signed copy of such determination. Arbitration proceedings shall be conducted pursuant to ORS 33.210 et seq. and the rules of the American Arbitration Association, except as provided otherwise.

(d) Each party shall pay the fees and expenses of the arbitrator appointed by such party and one-half of the fees and expenses of the third arbitrator, if any.

25. Governing Law. This Agreement shall be governed and construed in accordance with the laws of the state of Oregon without resort to any

jurisdiction's conflicts of law, rules or doctrines.

EXHIBIT 4



OREGON CITY

625 Center Street | PO Box 3040 | Oregon City OR 97045
Ph: (503) 657-0891 | TOLL FREE (888) 873-1676 | Fax (503) 657-3339

APPLICATION FOR BUSINESS LICENSE

NEW ☐ TEMPORARY ☐ OWNERSHIP CHANGE ☐ ADDRESS CHANGE ☐ NAME CHANGE ☐ No. _____

Business Information				Business Owner and Contact Information			
Business Name				Owner Name			
Business Site Address				Home Address			
City, State, Zip				City, State, Zip			
Business Phone				Phone			
Business Email				Email			
Business Mailing Address				Emergency Contact Name			
City, State, Zip				Emergency Contact Phone			
Federal ID No. (EIN)				Metro Contractor's License			
4 Digit SIC Code (if known)				State License # (if applicable)			
Detailed Description of Business (REQUIRED): What specific activity are you conducting?							
Indicate type of ownership ☐ Sole proprietor ☐ Partnership ☐ LLC ☐ Corporation ☐ Non-Profit ☐							
Is your business located within the City limits of Oregon City? Yes ☐ No ☐		Total number of persons doing business in Oregon City?		Hours of Operation?		Is the proposed business a permitted use within the zone? Yes ☐ No ☐	
Zoning of property where business is located: (see reverse)							
Business based in home?	Yes ☐ No ☐	If "YES" Home-Based Business Worksheet form required. (see reverse)					
Marijuana business?	Yes ☐ No ☐	If "YES" Marijuana Business Supplemental Questionnaire form required.					
Business has a sign in the right-of-way?	Yes ☐ No ☐	If "YES" additional fees may apply. (see reverse)					
Hazardous materials?	Yes ☐ No ☐	List:					
Comply with recycling requirements?	Yes ☐ No ☐	See OCMC 8.22.050					
Temporary (Two weeks or less)?	Yes ☐ No ☐	See OCMC 5.04.060 A					
I HEREBY CERTIFY THAT ALL INFORMATION IS TRUE, CORRECT, AND COMPLETE. ADDITIONALLY, I CERTIFY THAT THIS BUSINESS COMPLIES WITH ALL STATE, FEDERAL, AND LOCAL LAWS. Yes ☐ No ☐				Applicant's Signature:			
Credit Card Information (if paying with credit card)	Account Number		Exp. Date		3 Digit CSC (back of card)		
	Visa ☐ M/C ☐		Using payment schedule, list amount paid		FEE \$		
PAYMENTS MUST ACCOMPANY APPLICATION. MAKE CHECKS PAYABLE TO: City of Oregon City A business license does not authorize the holder to conduct business in violation of any zoning ordinance or other state, federal, or local law.							
OFFICE USE ONLY							
Amount Paid	Receipt #	☐ Cash ☐ Check	☐ Visa ☐ MasterCard	SIC Code	Date Paid / By		

WHO NEEDS A BUSINESS LICENSE?

Oregon City Municipal Code Chapter 5.04 requires all businesses conducting business inside the city limits of Oregon City to obtain an Oregon City business license.

HOW TO APPLY FOR A BUSINESS LICENSE

Complete this **Application for Business License** form and submit it with the applicable fees, either:

- in person at 625 Center Street
- by mail to Business Licensing, PO Box 3040, Oregon City, OR 97045
- by fax to (503) 657-3339
- by email to licensing@orcity.org

This form can be found online at <https://www.orcity.org/economicdevelopment/business-licenses>. Applications must be filled out completely. Incomplete applications will expire if not completed within 30 days. In the event a license application expires, the applicant may reapply for the business license. Businesses operating in the City must comply with all building, zoning, signage, fire and police requirements. Completion of the application does not imply business license approval. The business may not begin until the business license and all necessary permits, signs and inspections are approved by the City. Before submitting an application for a business license, please contact Community Development at (503) 722-3789 to verify that your business is a permitted use within the zone you are located in. To determine the zoning of the property where the business is located, visit <https://www.orcity.org/405/what-zone-am-i-in>.

Additional forms can be found at <https://www.orcity.org/economicdevelopment/business-licenses>

- Marijuana businesses are required to complete the **Marijuana Business Supplemental Questionnaire** form.
- Home-based businesses located in the City are required to complete the **Home-Based Business Worksheet** form.
- Mobile food cart businesses are required to complete the **Food Cart/Unit in a Pod or Location Approved for 5+ Hours** form.
- Temporary businesses and solicitors operating within the legal boundaries for up to two weeks or less are required to complete the form.

BUSINESS LICENSE FEES



annual business
license fee
(see chart below)

The cost of the annual business license is dependent on the number of employees and whether the business is operating from a fixed place of business within the city. When figuring the number of employees, include all persons involved in the business including owners, officers, employees and others operating within the City of Oregon City. Please verify the business location as it relates to Oregon City's jurisdictional boundary. New businesses that begin after January 31st of the current year will pay a prorated business license fee. The prorated amount is calculated at 1/12 for every month of the calendar year.

	<u>NUMBER OF EMPLOYEES</u>	<u>FIXED PLACE OF BUSINESS WITHIN CITY</u>	<u>NO FIXED PLACE OF BUSINESS WITHIN CITY</u>
Commercial Business:	1 – 25	\$ 178	\$ 228
	26 – 50	\$ 286	\$ 390
	51 or more	\$ 394	\$ 552
*Amounts above include the \$78 Community Safety Advancement Fee. (OCMC 13.36.040)			
Home-based Business:	-n/a-	\$ 100	-n/a-
Temporary Two weeks or less: and each occurrence	-n/a-	\$ 50	\$ 50

Any business that is tax-exempt under section 501(c)(3) of the Internal Revenue Code is exempt from payment of these business license fees upon submission of a copy of their IRS letter indicating their exempt status.

If you intend to have a sign in the Right of Way, please contact Community Development at (503) 722-3789 to discuss hours of placement, size of sign, etc. to determine if additional fees apply.

WHAT IF THE BUSINESS LICENSE IS DENIED?

If the issuance of a business license is denied, the city shall send to the applicant written notice of the denial or revocation, and of the right to an appeal. The denial or revocation of the license is final unless the applicant/license holder appeals the decision in writing to the city manager within ten business days of receipt of the notification. The city manager shall, within ten business days after the appeal is filed, consider all the evidence in support of or against the action appealed and render a decision either sustaining or reversing the denial or revocation. The decision of the City Manager shall be the final decision of the city. (OCMC 5.04.090)

QUESTIONS?

Contact the business license office at 503-657-0891 or visit us at 625 Center Street.

COMPARATIVE REVIEW OF APPRAISER RFPs

Appraisal Designation Hierarchy In Oregon

There are three categories of licensed or certified appraisers in Oregon; state licensed appraiser, state certified residential appraiser, and state certified general appraiser. Individuals working under the direct supervision of a supervising appraiser in order to meet the experience criteria required for licensure or certification, are known as registered Appraiser Assistants. Unlicensed/uncertified and unregistered individuals may assist in the preparation of an appraisal but are not allowed to sign the appraisal report.

The application process has three components: Education, Experience and Examination. Appraisers in Oregon must demonstrate competency by meeting prerequisite qualifying or continuing education, experience and examination requirements established by the licensure board.

Appraisal Institute Professional Credentials

Description of Certified General Appraiser: The highest level of certification is the certified general appraiser. A certified general appraiser, or commercial appraiser, can appraise all types of real estate—including both residential and commercial properties. That includes everything from single-family homes to apartment complexes, strip malls, and airports. This credential generally requires an extra 50 hours of qualifying education or an eligible degree, 1,500 hours of work experience, and an exam.

Description of MAI Appraiser: Member Appraiser Institute Designated members (“MAI”) are held by appraisers who are experienced in the valuation and evaluation of commercial, industrial, residential and other types of income producing properties. MAI appraisers are recognized throughout the commercial real estate industry as highly qualified experts in valuation. They must complete an approved 4-year degree. Pass all Appraisal Institute required exams including a comprehensive examination. Complete 4,500 hours of specialized work. Complete a demonstration appraisal report. Currently, the Appraisal Institute offers only two membership designations, MAI and SRA (Senior Residential Appraiser). There were various other designations but they were eliminated as a result of a 1991 unification of two organizations that merged into the Appraisal Institute. These organizations were the American Institute of Real Estate Appraisers, (founded in 1932) and the Society of Real Estate Appraisers (founded in 1935). In 2014, the Appraisal Institute established the AI-GRS Membership Designation to address the growing importance of risk assessment and due diligence in today’s economy.

Description of AI-GRS Membership Designation: The AI-GRS membership designation (“Appraisal Institute-General Review Specialist”) is held by professionals who provide reviews of appraisals of a wide range of property types, including commercial, industrial, agricultural, residential, and vacant land. These individuals possess experience and knowledge to address issues unique to commercial real property reviews. In 2014, the Appraisal Institute established the AI-GRS Membership Designation to address the growing importance of risk assessment and due diligence in today’s economy. The completion of continuing education requirements assures that AI-GRS Designated Members remain informed on trends pertaining to reviews, enabling them to provide reviews that reflect the latest in professional practice.

EVALUATION CRITERIA

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF DIRECT INVOLVEMENT OF PROPERTY APPRAISAL	COST
Portland Valuation Group (Sherwood, OR) Company has completed similar assignments for the Beaverton Urban Renewal Agency (URA), Sherwood URA, Wilsonville URA, Tigard URA, Happy Valley URA, Hillsboro URA.	David Balfour, Owner, MAI, Certified General Appraiser	12 years, client relationships, manages, reviews all projects writes/review appraisal work	Will validate the appraisal work of others	\$5,950
	Sam Karpeles, Senior Appraiser. Certified General Appraiser, MAI based out of Portland	8 years of appraisal experience, manages and reviews all projects, assists in writing and reviewing all appraisal work	Will most likely conduct the actual appraisal review but assistants will collect the data on the property.	
	Zack Jacobs, Registered Appraiser Assistant, candidate for credentials	Conducts research and statistical analysis	Will provide research and statistical support to the Senior Appraiser	
	Phillip Mills, Registered Appraiser Assistant, candidate for credentials	Conducts research and statistical analysis	Will provide research and statistical support to the Senior Appraiser	
	Maria Friesen, Project and Research Coordinator	Manages multiple appraisal projects, 2 years	Coordinating and maintaining project schedules	

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF INVOLVEMENT IN PROPERTY APPRAISAL	COST
BBG Real Estate Services (Dallas, Texas) No mention of work in the Portland Metro Area	Kurt Plaster, Managing Director of the Portland Office, Certified General Appraiser. Based out of the Portland office.	16 years of appraisal experience, engages in business development and client outreach. Engaged in business development and client outreach. Manages the office	Indirect reviews, validates the work of others	\$3,900
	Christopher Hartman, Director, Certified General Appraiser Based out of the Portland office.	21 years of appraisal experience. Supervises and works in collaboration with appraisers and analysts. Works in collaboration with appraisers	Indirect reviews, validates the work of others	
	Christoper Durek, Director of Institutional Practice West Region in San Francisco office. General Certified Appraiser, no MAI designation.	Experience includes a variety of commercial appraisal assignments in CA, OR, WA.	???	

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF INVOLVEMENT IN PROPERTY APPRAISAL	COST
Moscato, Okoneski & Associates, Inc. (Portland, OR) Location of buildings that have been appraised in the past two years: Oregon City, Portland, Lake Oswego, Hillsboro, Tigard, Astoria, The Dalles, Beaverton, and Tualatin.	Paul Moscato, Principal, Certified General Appraiser, MAI Designation.	16 years of appraisal experience. Special emphasis on the industrial sector. A principal in the company.	Direct Project reviews/analysis	\$3,800
	T. Chad Plaster, JD, MAI, Certified General Appraiser	18 years of appraisal experience and is an attorney, a principal in the company	Indirectly involved, appraisal. will review and validate the work of others	
	Brett Okoneski, MAI, Certified General Appraiser	30 years of appraisal experience, a principal in the company	Indirectly involved will reviews and validate the work of others	
	James Robinson, Certified General Appraiser. No MAI designation,	20 years of appraisal experience, staff appraiser	Direct appraisal review/analysis	
	Chazya LeCavalier, not MAI, Certified General Appraiser	6 years of appraisal experience, appraiser assistant	Assistant the appraisers	

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF INVOLVEMENT IN PROPERTY APPRAISAL	COST
CBRE Valuation & Advisory Services (Dallas, TX)	Genesse Borges, VP in the Valuation & Advisory Services Division in the Intermountain Northwest and Pacific NW Region. Based in the Portland office.	No apparent MAI Designation, has conducted right of way appraisal work. Is a project manager.	Will not be involved in appraisal work	Based on complexity of appraisal assignment
	Steve Parent, MAI, AI-GRS, SRA, Principal Appraiser, Senior VP of the Valuation & Advisory Services Division in the Mountain NW & Pacific Southwest Region	Will serve as Principal Appraiser and Reviewer for this contract, 10 years of experience in right-of-way appraisals (acquisition of easements, eminent domain situations)	Will evaluate the appraisal work of others, will use local appraisers.	
	Nick Anderson, MAI, VP of Valuation & Advisory Service, Portland Office	7 years of experience in the Portland office, Senior Appraiser.	Will most likely conduct the appraisal work	

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF INVOLVEMENT IN PROPERTY APPRAISAL	COST
Valbridge Property Advisors (Portland, OR) (Right-of-Way Appraisals-acquisition of easements, eminent domain situations)	Jason Roos, MAI, AI-GRS, Senior Managing Director	Managing teams and workflows for 15 years. Licensed in 14 states. Is the only Oregon Certified General Appraiser in his operation.	Will evaluate the appraisal work of others	\$13,500
	Daniel Kann, MAI, General Certified Appraiser, Senior Managing Director	Kann is a General Certified Appraiser in other states not in Oregon	Will not be involved with the Stimson Property	
	Tyler Siegworth, MAI, Director Multi-family	Tyler is a General Certified Appraiser in other states not in Oregon	Will not be involved with the Stimson Property	
	Brian Ambuel, licensed appraiser, candidate for designation with the institute.	Licensed to conduct appraisals in Oregon but has not obtained professional designation credentials.	Will most likely conduct the appraisal with oversight by Mr. Roos.	

RESPONDANTS	EXPERIENCE IN LOCAL MARKET	DEGREE OF EXPERIENCE OF APPRAISER	DEGREE OF INVOLVEMENT IN PROPERTY APPRAISAL	COST
BDO USA, LLP National and International Firm Local contact based out of Dallas, TX, Has a field office in Seattle, WA. No mention of any work conducted in Oregon	Wayne Horvath, MAI Managing Director, Valuation and Capital Market Analysis Practice, Authorized Representative on the proposed OR contract	Not licensed to conduct appraisals in Oregon	Will not be involved in appraisal work	\$32,000
	Jeff Briggs, MAI, Certified General Appraiser, Director Engagement Leader/Oregon Licensee Director in the Valuation and Capital Market Analysis Practice	Licensed to conduct appraisals in Oregon	Will evaluate the appraisal work of others	
	Charles Wilson, MAI Senior Manager, Scope Leader, Valuation and Capital Market Analysis Practice focusing on commercial real estate	Not licensed to conduct appraisal work in Oregon		
	Jaclyn DeSantis, Manager, Staffing Leader, Manager in the Valuation and Capital Market Analysis Practice based in San Diego, CA	Not licensed to conduct appraisal work in Oregon		



June 27, 2024

James Graham, CEcD
Economic Development Manager
URA, City of Oregon City
635 Center Street
Oregon City, Oregon 97045

Re: Real Estate Appraisal Services

Dear James Graham:

This proposal is to provide appraisals as set forth in the request for proposals referenced above. I have reviewed the solicitation and the requested information is contained herein.

Our firm has been in business for 46 years. During the past 15 years, our firm has worked in more than half of the states in the Union. I would be the point of contact for this project. I am licensed in 14 states (including Oregon), and have extensive experience working with local governments, state, and federal agencies.

I certify the items listed in the RFP as the authorized representative for our firm.

I trust that you will find our proposal complete, but if any additional information is desired, please let me know. Thank you for this opportunity.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Jason Roos', written over a light blue circular background.

Jason Roos, MAI, AI-GRS
Senior Managing Director

History and Description

During the past 15 years our firm has worked in more than half of the states in the Union. We have offices in Portland, Kansas City, Minneapolis-St. Paul, Indianapolis, St. Louis, and North Dakota. Valbridge Property Advisors is a nationwide appraisal firm with 70 offices. Although we are affiliated with other firms across the country, we are independently owned and operated. The national brain trust enables the collection of relevant data at the highest levels.

We have extensive experience appraising all property types including right of way, multifamily, retail, industrial, office and a variety of special purpose properties. We have appraised large office complexes and large shopping malls. Our work includes market studies, tax appeal, and condemnation cases for market rate (family, senior, and student), Section 42 (LIHTC), and Section 8 (HAP contracts).

We also work with many federal agencies, state agencies, and local governments. A partial list of agencies is included below.

- General Services Administration (GSA) – We work regularly with Regions 6 and 7 and had a five year IDIQ with GSA Disposal for Nebraska.
- Federal Aviation Administration (FAA) – We have completed airport expansion work in several locations in Kansas and Missouri.
- Department of Justice (DOJ) – We have completed multiple parcel assignments along rail corridors in Kansas and Missouri.
- US Postal Service (USPS) – We have completed FAR studies and appraisals in seven states.
- Department of Housing and Urban Development (HUD)
- US Army Corps of Engineers (USACE) and US Marshalls

Experience of professional staff

Jason Roos, MAI, AI-GRS is licensed in 14 states (including Oregon), and has extensive experience working with municipal and state governments along with the federal government including projects for the USACE, FAA, GSA and Western Area Power Association. Mr. Roos holds the MAI and AI-GRS designations from the Appraisal Institute. He has been managing teams and work flows for more than 15 years.

Daniel Kann, MAI, MSRE holds the MAI designation from the Appraisal Institute and is a General Certified real property appraiser in Kansas, Missouri, Iowa, Nebraska, and Arizona. He has a master's in real estate from the University of Denver and has appraised real estate for 15 years. Daniel is also an adjunct professor at the University of Missouri Kansas City teaching real estate valuation. He has been managing teams and work flows for more than a decade.

Tyler Siegworth, MAI holds the MAI designation from the Appraisal Institute and is a General Certified real property appraiser in Kansas, Missouri and Minnesota. He has a bachelor's degree from the University of Northern Iowa in Real Estate Finance.

Brian Ambuel is a licensed appraiser in Oregon, Washington and Minnesota. He is a Candidate for Designation with the Appraisal Institute and has a bachelor's degree from Lewis and Clark College.

Qualifications for Mr. Roos, Mr. Kann, Mr. Siegworth and Mr. Ambuel follow the proposal.

Quote

The quote for this project would be \$13,500.



Valbridge
PROPERTY ADVISORS

**INDEPENDENT VALUATIONS FOR A VARIABLE
WORLD**



Jason Roos, MAI, AI-GRS
Valbridge Property Advisors | Kansas City
jroos@valbridge.com

Kansas City Office

10990 Quivira Road
Suite 100
Overland Park, KS 66210
913.451.1451 (office)
913.647.4095 (direct)

STATE CERTIFICATIONS

AZ	1032017	MT	REA-RAG-LIC-17994
AR	CG-3651	NE	CG2013001R
CO	CG200001535	ND	CG-21495
IA	CG03139	OK	13681CGA
ID	CGA-6399	OR	C001344
IN	CG41700020	SD	1436CG-R
KS	G-2639	VA	4001018692
MN	40694919	WA	24013477
MO	2009011367	WY	AP-2449

EDUCATION

Bachelor of Business Administration
University of North Dakota

www.valbridge.com

Jason Roos, MAI, AI-GRS

Senior Managing Director

Valbridge Property Advisors | Kansas City

MEMBERSHIPS & AFFILIATIONS

Appraisal Institute

- MAI Designation
- AI-GRS Designation
- Kansas City Chapter President; 2014

APPRAISAL INSTITUTE & RELATED COURSES

- Business Practices and Ethics
- Uniform Standards of Appraisal Practice
- Advanced Income Capitalization
- Advanced Sales Comparison and Cost Approaches
- Report Writing and Valuation Analysis
- Advanced Applications
- A Debate on the Allocation of Hotel Total Assets
- Fundamentals of Separating Real Property, Personal Property, and Intangible Business Assets
- Appraising the Appraisal: Appraisal Review – General
- Analyzing Tenant Credit Risk and Commercial Lease Analysis
- Condemnation Appraising: Principles and Applications
- Appraising Automobile Dealerships
- Appraisal of Medical Office Buildings
- Appraisal of Fast-Food Facilities
- Fair Housing, Bias and Discrimination
- Introduction to Green Buildings: Principles and Concepts
- Full course list upon request

EXPERIENCE

Valbridge Property Advisors | Kansas City

- Senior Managing Director, 2007-Present

Appraisal/valuation and consulting assignments include:

Across the Midwestern United States and Oregon, our appraisal, valuation, and consulting assignments encompass a wide spectrum. We conduct comprehensive assessments of commercial real estate properties, from large office complexes to industrial warehouses. Our expertise extends to evaluating agricultural land, automobile dealerships, and NNN leased properties. We offer insights into suburban residential developments. Our consultation spans diverse domains, including tourism-driven hotel ventures, healthcare facilities, and environmentally conscious real estate projects. Market research and feasibility studies complement our services, and we complete third-party reviews for clients in need of that service.



Valbridge
PROPERTY ADVISORS

Jason Roos, MAI, AI-GRS

Senior Managing Director

Valbridge Property Advisors | Kansas City

CERTIFICATIONS

 **STATE BOARD OF APPRAISERS,
ABSTRACTERS, AND HOME INSPECTORS**

This is to certify that
Jason Roos
Credential # **CG-3651**
has complied with the requirements of Arkansas code 17-14-201 et seq.; and is the holder of a valid credential. This card is for identification purposes only.
Expiration Date: 1/4/2025

Chairman
Chairman

Department of Insurance and Financial Institutions
State of Arizona

CGA - 1032017

This document is evidence that: **Jason T Roos** has complied with the provisions of Arizona Revised Statutes, relating to the establishment and operation of a:

Certified General Real Estate Appraiser

and that the Deputy Director of Financial Institutions of the State of Arizona has granted this license to transact the business of a:

Certified General Real Estate Appraiser

Jason T Roos

This license is subject to the laws of Arizona and will remain in full force and effect until expired, surrendered, revoked or suspended as provided by law.

Expiration Date: **November 30, 2025**

Jason T Roos
10990 Quivira Suite 100
Overland Park, KS 66210

Marcia Waters
Director: Marcia Waters

State of Colorado
Department of Regulatory Agencies
Division of Real Estate



Board of Real Estate Appraisers

Jason T Roos
Certified General Appraiser

License #: CG200001535
Status: Active
Expires: 12/31/2024

For the most up to date information regarding this credential, visit <http://dora.colorado.gov/dre>



STATE OF IDAHO

**THE IDAHO
REAL ESTATE APPRAISER
BOARD**

Certifies that
Jason Tyler Roos
having fulfilled all the requirements of the Laws of Idaho and possessing the prescribed qualifications, is hereby authorized to practice as a
Certified General Appraiser
within the State of Idaho

IN TESTIMONY WHEREOF, I have here unto put my hand and affixed the Official Seal of the Division of Occupational and Professional Licenses at Boise, Idaho, this **21st** day of **May**, A.D. **2024**

Russell S. Barron
RUSSELL S. BARRON
ADMINISTRATOR, DIVISION OF
OCCUPATIONAL AND PROFESSIONAL LICENSES

 **Indiana Professional Licensing Agency
Real Estate Appraiser Licensure Board**
402 W. Washington Street, W072
Indianapolis, IN 46204

Certified General Appraiser

License Number	Expire Date
CG41700020	06/30/2026

Jason T. Roos

Eric J. Holcomb
Governor
State of Indiana

Lindsay M. Hyer
Executive Director
Indiana Professional Licensing Agency

 **STATE OF IOWA**
IOWA DEPARTMENT OF COMMERCE
PROFESSIONAL LICENSING AND REGULATION

This is to certify that the below named has been granted a certification as: Certified General Appraiser.

Certification Number: CG03139 Expires: June 30, 2025

Status: Active

Jason Roos
Valbridge Property Advisors | Kansas City
10990 Quivira Road, Ste 100
Overland Park, Kansas 66210

State of Kansas

Real Estate Appraisal Board

This is to certify that
Jason Tyler Roos
has complied with the provisions of the Kansas State Certified and Licensed Real Property Appraisers Act to transact business as a
Certified General Real Property Appraiser
in the State of Kansas

License #: G-2639
Effective date: 07/01/2024
Expiration date: 06/30/2025

Chairman
Chairman



Valbridge
PROPERTY ADVISORS

Jason Roos, MAI, AI-GRS

Senior Managing Director

Valbridge Property Advisors | Kansas City

CERTIFICATIONS

STATE OF MINNESOTA



Department of Commerce

JASON T. ROOS
10990 QUIVIRA ROAD
STE 100
OVERLAND PARK, KS 66210

The Undersigned COMMISSIONER OF COMMERCE for the State of Minnesota hereby certifies that
Jason T. Roos

10990 QUIVIRA ROAD
STE 100
OVERLAND PARK, KS 66210

has complied with the laws of the State of Minnesota and is hereby licensed to transact the business of
Non-Resident Appraiser : Certified General

License Number: 40694919

unless this authority is suspended, revoked, or otherwise legally terminated. This license shall be in effect
until August 31, 2025.

IN TESTIMONY WHEREOF, I have hereunto set my hand this August 21, 2023.



COMMISSIONER OF COMMERCE
Minnesota Department of Commerce
Licensing Division
65 7th Place East, Suite 500
St. Paul, MN 55101-3105
Telephone: (651) 536-1599
Email: licensing.commerce@state.mn.us
Website: commerce.state.mn.us

Notes:

- Individual Licensees Only - Continuing Education: 15 hours is required in the first renewal period, which includes a 7 hour USPAP course. 30 hours is required for each subsequent renewal period, which includes a 7 hour USPAP course.
- Appraisers: You must hold a licensed Residential, Certified Residential, or Certified General qualification in order to perform appraisals for federally-related transactions. Trainees do not qualify. For further details, please visit our website at commerce.state.mn.us.

State of Nebraska
Real Property Appraiser Board



Hereby certifies that: JASON T. ROOS

VALBRIDGE PROPERTY ADVISORS
10990 QUIVIRA RD STE 100
OVERLAND PARK, KS 66210-2016

Is credentialed in the State of Nebraska as a:
Certified General Real Property Appraiser

Holding credential number: CG2013001R

Effective Date: Jan 01, 2023 Expiration Date: Dec 31, 2024

Nebraska Real Property Appraiser Board Director: 

All address changes, business or residence, must be reported to the Real Property Appraiser Board immediately.
This Credentialing Card is proof that each person is credentialed under the Real Property Appraiser Act unless credential has been canceled, surrendered, suspended, or revoked.

Nebraska Real Property Appraiser Board
301 Centennial Mall South, First Floor PO Box 94963
Lincoln, Nebraska 68509-4963
Phone: 402-471-9015 Fax: 402-471-9017 <https://appraiser.ne.gov/>

Administrative Identification Number: 10686-2023	Registration Fee Paid: \$550.00
Random Fingerprint Audit Program Fee Paid: \$10.00	Federal Registry Fee Paid: \$80.00

North Dakota Real Estate Appraiser Qualifications and Ethics Board



Jason T. Roos

Is fully qualified
in the State of North Dakota as a

CERTIFIED GENERAL APPRAISER
ND Permit Number: CG-21495

Date of issuance: 01/01/2024
Expiration Date: 12/31/2024



Appraiser Signature

Unless sooner suspended or revoked, as provided by law.

State of Oklahoma



Glen Mulready, Insurance Commissioner

Oklahoma Real Estate Appraiser Board

This is to certify that:

Jason T. Roos

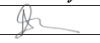
has complied with the provisions of the Oklahoma Real Estate Appraisers Act to transact business as a State Certified General Real Estate Appraiser in the State of Oklahoma.

In Witness Whereof, I have hereunto set my hand and caused the seal of my office to be affixed at the City of Oklahoma City, State of Oklahoma, this 3rd day of June, 2022.




Glen Mulready, Insurance Commissioner
Chairperson, Oklahoma Real Estate Appraiser Board
Members, Oklahoma Real Estate Appraiser Board








Expires:
06/30/2025

Oklahoma Appraiser Number:
13681CG4

State of Missouri

Missouri Department of Commerce and Insurance
Division of Professional Registration
Real Estate Appraisers Commission

State Certified General Real Estate Appraiser



VALID THROUGH JUNE 30, 2026
ORIGINAL CERTIFICATE/LICENSE NO. 2009011367

JASON T ROOS
10512 W 130TH TERR
OVERLAND PARK KS 66213
USA


EXECUTIVE DIRECTOR


DIVISION DIRECTOR



State of Montana
Employment Standards Division
Board of Real Estate Appraisers

This certificate verifies licensure as:
CERTIFIED GENERAL APPRAISER

REA-RAG-LIC-17994

Status: Active
Expires: 03/31/2025

VALBRIDGE PROPERTY ADVISORS
JASON ROOS KS
10990 QUIVIRA ROAD
STE. 100
OVERLAND PARK, KS 66210

 Montana Department of
LABOR & INDUSTRY
RENEW OR VERIFY YOUR LICENSE AT:
<https://dli.mt.gov/jedi>



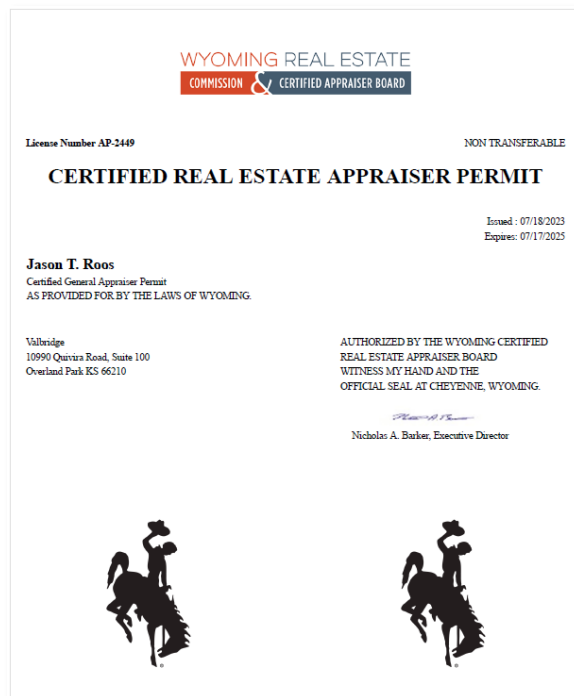
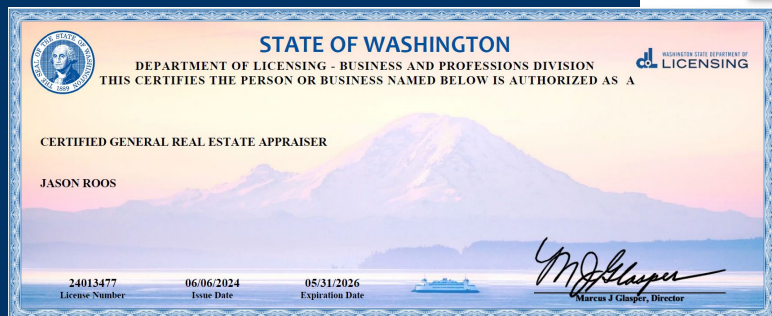
Valbridge
PROPERTY ADVISORS

Jason Roos, MAI, AI-GRS

Senior Managing Director

Valbridge Property Advisors | Kansas City

CERTIFICATIONS





Valbridge
PROPERTY ADVISORS

**INDEPENDENT VALUATIONS FOR
A VARIABLE WORLD**



Daniel Kann, MAI, MSRE
Valbridge Property Advisors | Kansas City
dkann@valbridge.com

Kansas City Office

10990 Quivira Road
Suite 100
Overland Park, KS 66210
913.451.1451 (office)
913.647.4094 (direct)

STATE CERTIFICATIONS

Arizona	License #1033729
Iowa	License #CG03413
Kansas	License #G-2762
Missouri	License #2013034806
Nebraska	License #CG2015022R

EDUCATION

Bachelor of Arts – RE Finance | Marketing
University of Northern Iowa

Master of Real Estate | Construction
University of Denver

www.valbridge.com

Daniel Kann, MAI-MSRE

Senior Managing Director

Valbridge Property Advisors | Kansas City

MEMBERSHIPS & AFFILIATIONS

Appraisal Institute

- MAI Designation

CCIM Institute

- Candidate

IRWA/International Right of Way Association

- Member (prior Chapter Secretary)

University of Missouri, Kansas City

- Adjunct Professor

APPRAISAL INSTITUTE & RELATED COURSES

- Real Estate Finance and Investments
- Real Estate Tax
- Residential Construction Systems
- Real Estate Securities and Syndications
- Real Estate Investments and Appraisal
- Apartment Appraisal and Concepts
- Finance, Statistics and Valuation Modeling
- Argus, Excel, and Computer Modeling
- Understanding Commercial Capitalization Rates
- General Market Analysis and Highest & Best Use
- Discounted Cash Flow Model: Concepts & Issues
- Advanced Income Capitalization
- Forecasting Revenue
- Advanced Sales Comparison and Cost Approaches
- Analyzing Operating Expenses
- Full course list upon request

EXPERIENCE

Valbridge Property Advisors | Kansas City

- Real Estate Analyst | Appraiser, 2007 - 2012
- Senior Managing Director, 2013 - Present

Shaner Appraisals, Inc.

- Real Estate Analyst | Appraiser, 2007 - 2012

Appraisal/valuation and consulting assignments include:

Reviews, valuation, and due diligence for investors/developers, life insurance companies, lenders, REITS, and public entities. The analysis consists of property valuation (FHA, Fannie Mae, Freddie Mac, and conventional financing), market studies, feasibility studies, real estate tax analysis, and before and after analysis pertaining to right of way, easements, and litigation support.

PUBLICATIONS

Cap Rate Variations – Valuation 2014 and CCIM March/April 2015
Assessing Market Value – CCIM Summer 2020



Valbridge
PROPERTY ADVISORS

Daniel Kann, MAI-MSRE

Senior Managing Director

Valbridge Property Advisors | Kansas City

CERTIFICATIONS



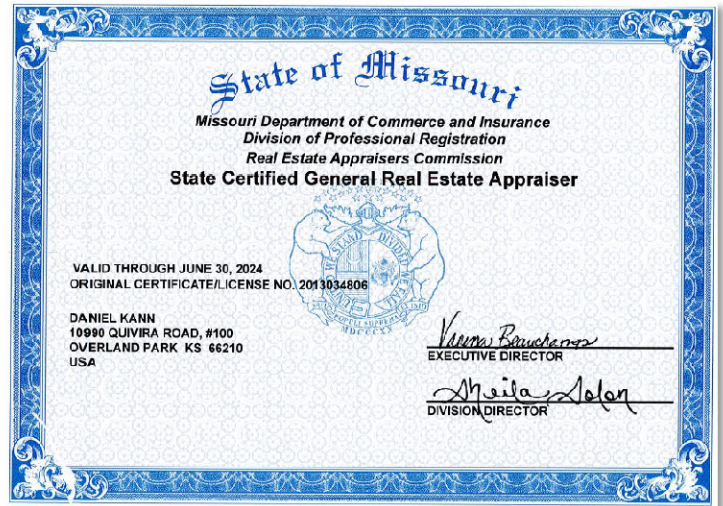
STATE OF IOWA
IOWA DEPARTMENT OF COMMERCE
PROFESSIONAL LICENSING AND REGULATION

This is to certify that the below named has been granted a certification
as: Certified General Appraiser.

Certification Number: CG03413 Expires: June 30, 2024

Status: Active

Daniel J. Kann
Valbridge Property Advisors
10990 Quivira Road, #100
Overland Park, Kansas 66210





Valbridge
PROPERTY ADVISORS

**INDEPENDENT VALUATIONS FOR
A VARIABLE WORLD**



Tyler Siegworth, MAI
Valbridge Property Advisors | Kansas City
tsiegworth@valbridge.com

Kansas City Office

10990 Quivira Road
Suite 100
Overland Park, KS 66210
913.647.4083 (direct)
913.647.4121 (fax)

STATE CERTIFICATIONS

Kansas G-3102
Minnesota 40877466
Missouri 2017002019

EDUCATION

Bachelor of Arts – Real Estate | Finance
University of Northern Iowa

www.valbridge.com

Tyler Siegworth, MAI

Director – Multifamily

Valbridge Property Advisors | Kansas City

MEMBERSHIPS & AFFILIATIONS

Appraisal Institute

- MAI Designation

APPRAISAL INSTITUTE & RELATED COURSES

- Appraisal Institute and Related Courses:
- Basic Appraisal Principles
- Basic Appraisal Procedures
- 15 Hour USPAP Equivalent Course
- Business Practices and Ethics
- General Appraiser Market Analysis and Highest & Best Use
- General Appraiser Income Approach Part 1
- General Appraiser Income Approach Part 2
- General Appraiser Site Valuation & Cost Approach
- General Appraiser Sales Comparison Approach
- Real Estate Finance Statistics and Valuation Modeling
- Advanced Market Analysis and Highest & Best Use
- Advanced Income Capitalization
- Advanced Concepts and Case Studies
- Quantitative Analysis
- Analyzing Operating Expenses
- Residential & Commercial Valuation of Solar
- Rates and Ratios
- Fundamentals of Apartment Appraising
- Forecasting Revenue
- The Discounted Cash Flow Model
- Appraiser's Guide to Expert Witnessing
- Market Analysis in Volatile Markets
- Eminent Domain and Condemnation
- Appraisal of Medical Office Buildings
- Full course list upon request

EXPERIENCE

Valbridge Property Advisors | Kansas City

- Director – Multifamily, 2013-Present

Appraisal/valuation and consulting assignments include:

Marketability studies, appraisal reports, rent comparability studies (RCS's), and reviews for various multifamily properties in Kansas, Missouri, Iowa, Nebraska, Minnesota, Arizona, Texas, North Dakota, South Dakota, Colorado, Oklahoma, Illinois, Tennessee, North Carolina, South Carolina, Arkansas, Florida, Georgia, Indianapolis, and Maryland. Assignments have included market rate, Section 8 (HAP), Section 42 (LIHTC), USDA rural, HUD insured, age-restricted, and student housing projects.



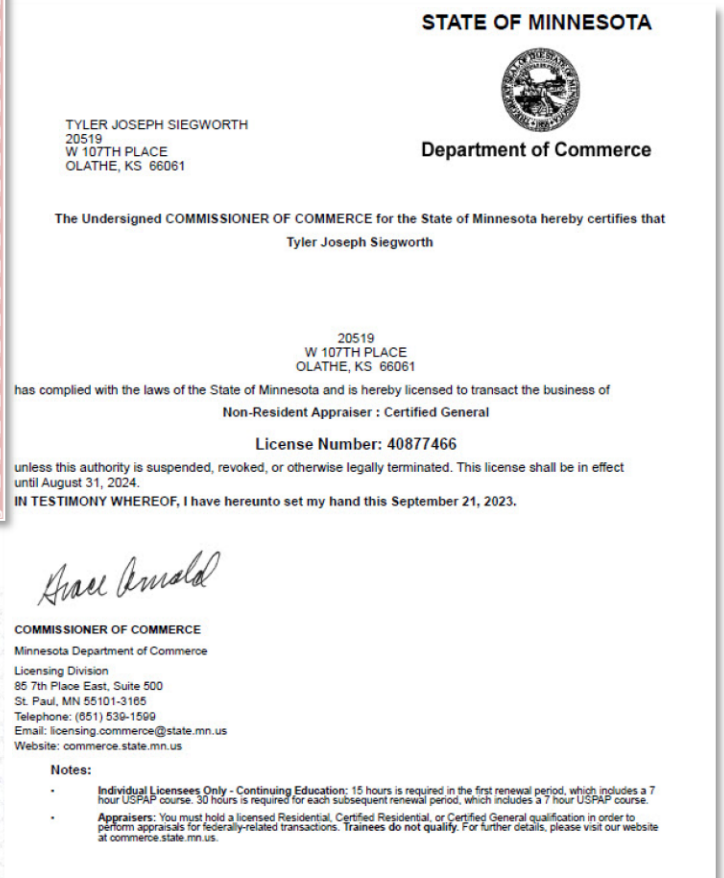
Valbridge
PROPERTY ADVISORS

Tyler Siegworth, MAI

Director – Multifamily

Valbridge Property Advisors | Kansas City

CERTIFICATIONS





Valbridge
PROPERTY ADVISORS

**INDEPENDENT VALUATIONS FOR A
VARIABLE WORLD**



Brian Ambuel

**Valbridge Property Advisors | Portland |
Minneapolis – St. Paul**

bambuel@valbridge.com

Portland Office

1155 SW Morrison Street
Suite 200
Portland, Oregon 97205
503-893-8794 (cell)

STATE CERTIFICATIONS

Minnesota License #40629616
Oregon License #C001586
Washington License #23020003

EDUCATION

Bachelor of Arts -Psychology
Lewis and Clark College

Master of Public Health Administration and
Policy – University of Minnesota

www.valbridge.com

Brian Ambuel

Senior Appraiser

**Valbridge Property Advisors | Portland |
Minneapolis – St. Paul**

MEMBERSHIPS & AFFILIATIONS

Appraisal Institute, Member

- Candidate for Designation

APPRAISAL INSTITUTE & RELATED COURSES

- Pre-Licensing, Licensing, and Continuing education courses taken through the Appraisal Institute, American Society of Appraisers, and other real estate organizations.
- Advanced & General Income Capitalization
- Advanced & General Market Analysis Highest and Best Use
- Advanced Concepts and Case Studies
- General Sales Comparison Approach
- General Appraiser Site Valuation & Cost Approach
- Quantitative Analysis
- Statistics, Modeling, and Finance
- National USPAP
- Full course list upon request

EXPERIENCE

Valbridge Property Advisors | Portland | Minneapolis – St. Paul

- Senior Appraiser (Portland), 2023-Present
- Senior Appraiser (Minneapolis – St. Paul); 2019-Present

Prairie Rose Properties

- Founder, 2018-2023

MNsure

- Director of Government Relations, 2017

Minnesota Department of Human Services

- Project and Policy Manager, 2015-2017
- Community Relations Consultant; 2014

United Way of Dane County

- Project Coordinator, 2012-2013

Appraisal/valuation and consulting assignments include:

Industrial, office, retail, commercial, hospitality, multiple-family, schools, educational campuses, maritime facilities, churches, residential subdivisions, land, agricultural, & health clubs.



Valbridge
PROPERTY ADVISORS

Brian Ambuel

Senior Appraiser

Valbridge Property Advisors | Minneapolis – St. Paul

CERTIFICATIONS

STATE OF MINNESOTA



Department of Commerce

BRIAN PHILIP AMBUEL
5424 10TH AVENUE SOUTH
MINNEAPOLIS, MN 55417

The Undersigned COMMISSIONER OF COMMERCE for the State of Minnesota hereby certifies that
Brian Philip Ambuel

6424 10TH AVENUE SOUTH
MINNEAPOLIS, MN 55417

has complied with the laws of the State of Minnesota and is hereby licensed to transact the business of
Resident Appraiser - Certified General

License Number: 40629616

unless this authority is suspended, revoked, or otherwise legally terminated. This license shall be in effect
until August 31, 2024.

IN TESTIMONY WHEREOF, I have hereunto set my hand this September 27, 2022.



COMMISSIONER OF COMMERCE
Minnesota Department of Commerce
Licensing Division
35 7th Place East, Suite 500
St. Paul, MN 55101-2165
Telephone: (651) 539-1699
Email: licensing.commerce@state.mn.us
Website: commerce.state.mn.us

Notes:

- Individual Licensees Only - Continuing Education: 16 hours is required in the first renewal period, which includes a 7 hour USPAP course. 30 hours is required for each subsequent renewal period, which includes a 7 hour USPAP course.
- Appraisers: You must hold a licensed Residential, Certified Residential, or Certified General qualification in order to perform appraisals for federally-related transactions. Trainees do not qualify. For further details, please visit our website at commerce.state.mn.us

Appraiser Certification and Licensure Board
State Certified General Appraiser
28 hours of continuing education required



BRIAN P AMBUEL
VALBRIDGE PROPERTY ADVISORS
255 E KELLOGG BLVD, STE 102A
SAINT PAUL, MN 55101

License No.: C001586
Issue Date: May 30, 2023
Expiration Date: November 30, 2024



Chad Koch, Administrator

STATE OF WASHINGTON
DEPARTMENT OF LICENSING BUSINESS AND PROFESSIONS DIVISION
THIS CERTIFIES THE PERSON OR BUSINESS NAMED BELOW IS AUTHORIZED AS A



CERTIFIED GENERAL REAL ESTATE APPRAISER

BRIAN AMBUEL



Marcus J. Glasgow, Director

23020003 07/11/2023 11/17/2024
License Number Issue Date Expiration Date

PROPOSAL FOR REAL ESTATE APPRAISAL & COMMERCIAL ECONOMIC ANALYSIS PROFESSIONAL

For The Urban Renewal Agency of Oregon City

Moscato
Okoneski &
Associates, Inc.
Real Estate Appraisers and Consultants

13765 Cornell Road Ste 200
Portland, OR 97229

Phone: 503-646-8111
Email: paul@mohportland.com

Contents

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Cover Letter

Dear Members of the Urban Renewal Agency of Oregon City,

I am pleased to submit a comprehensive proposal in response to your Request for Proposals (RFP) seeking real estate appraisal services for the Stimson Property located at 1795 Washington Street. As a reputable appraisal firm with a strong commitment to excellence and a proven track record in delivering precise and insightful valuations, Moscato, Okoneski & Associates is well positioned to meet the requirements outlined in the RFP.

We specialize in providing expert real estate appraisal services tailored to the unique needs of commercial properties. Our firm brings over 150 years of collective experience in evaluating a diverse range of commercial real estate assets, including retail, office, and industrial properties in the Clackamas County and the larger Portland Metro. We are dedicated to applying industry-leading methodologies to ensure our appraisals are accurate, thorough, and compliant with all regulatory standards.

We are eager to partner with the Urban Renewal Agency of Oregon City to support the redevelopment objectives for the Stimson Property. Our commitment to delivering actionable insights and reliable valuations will contribute to the success of your project.

Thank you for considering Moscato, Okoneski & Associates for this opportunity. We welcome the chance to discuss how our expertise aligns with your project goals in more detail. Please feel free to contact me at 503-646-8111 or via email at paul@mohportland.com.

Sincerely,



Paul Moscato, MAI
Principal Appraiser
Moscato, Okoneski & Associates

Brief History



Louis J. Moscato, MAI

Moscato, Okoneski & Associates was founded in 1979 by Louis J. Moscato, MAI and the late Lawrence E. Ofner, MAI. For the past 44 years, we have been serving the Portland Metro and Pacific Northwest with outstanding real estate appraisal and consultation services. We have a reputation in the industry for rigorously completing complex and difficult appraisal assignments.

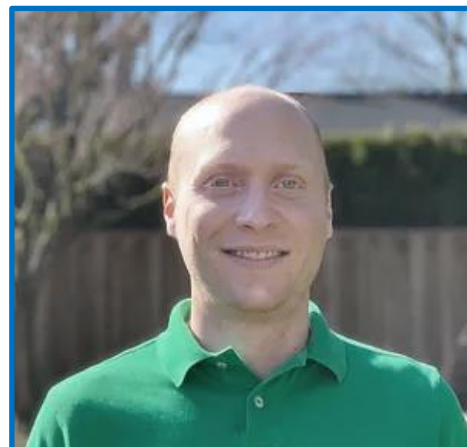
In the last five years, we have provided appraisal services involving over 1,700 properties across the Pacific Northwest for purposes such as eminent domain, financing, property tax assessment, purchase/sale transactions, and litigation support. Our reports include a detailed study of the economic conditions affecting the marketplace, in-depth analysis of the subject property and appropriate market data. In addition to excellence in appraisal, our firm is a COBID-certified ESB small business that is dedicated to sustainability and social equity innovations. With a strong commitment to diversity, inclusion, and community involvement, we aim to create a positive impact that goes beyond appraisal.

Some notable relevant projects that we completed in the past two years include:

- **Lower Mill Redevelopment Site** in O'Dell for the Port of Hood River.
- **Industrial Distribution Warehouse** with Willamette River frontage in Portland.
- **Industrial Warehouse** with Willamette River frontage in Portland.
- **Religious Facility** in Oregon City.
- **University Building** located on a campus in Salem.
- **Permanent Easement for Access** for a school district in Beaverton.
- **Permanent Easement for Power Line** in Hillsboro.
- **Permanent Easement for Parking Lot** in Tualatin.
- **High-Rise Office Building** in the central business district of Portland.
- **Mid-Rise Creative Office Building** located in Close-In Southeast Portland,
- **Drive-Thru Restaurants** located in Pendleton, Milton-Freewater, and LaGrande.
- **Large Retail Furniture Showroom** in The Dalles.
- **Multi-Family Residential Building** in the Tigard Triangle area of Tigard,
- **Three-Story Apartment Complex** in Astoria.
- **109-Lot Proposed Subdivision** in Lake Oswego.
- **Litigation Support** for multiple properties.
- **Tax Appeal Support** for high-rise and mid-rise office buildings in downtown Portland.
- **Appraisal Review** for bank clients on 85 appraisals written by CBRE, BBG, and others.

Professional Staff Members

Paul Moscato, MAI is a highly skilled principal appraiser at our firm. As the son of Lou Moscato, Paul has inherited a passion for the appraisal profession and has developed his own expertise in the field. Paul is widely recognized as an expert in various property types, with a special emphasis on the industrial sector. With a Bachelor of Science in Marketing from Santa Clara University and 16 years of appraisal experience, Paul is committed to excellence and staying abreast of industry trends and best practices. Clients can rely on Paul's expertise and attention to detail to provide them with comprehensive and reliable appraisals for all their commercial real estate needs.



Designated Member of the Appraisal Institute (MAI) / Oregon Certified General No. C001107



T. Chad Plaster, JD, MAI is a distinguished principal appraiser at our firm. With a unique background that encompasses 10 years of experience as a practicing attorney and a Juris Doctor from Lewis & Clark College, Chad brings a wealth of legal experience to his role. He has been qualified as an expert witness in Oregon Courts. As the former president of the Appraisal Institute Greater Oregon Chapter in 2022, Chad has showcased his leadership and commitment to advancing the field of appraisal. Chad has nearly 20 years of commercial appraisal experience and is recognized as an expert in all types of commercial real estate development. His diverse

background and extensive knowledge allow him to provide exceptional insights and support to clients, ensuring the highest level of expertise in every appraisal assignment.

Designated Member of the Appraisal Institute (MAI) / Oregon Certified General No. C001034

Brett Okoneski, MAI is an esteemed principal appraiser at our firm, boasting over 30 years of experience in the valuation and analysis of commercial real estate. Armed with a Bachelor of Science in Finance from the University of Arizona, Brett's comprehensive understanding of finance principles further enhances his ability to deliver accurate and insightful appraisals across all property types. Recognized as an expert in commercial real estate, Brett's unwavering commitment to excellence and his profound knowledge make him a trusted authority in commercial real estate appraisal.



Designated Member of the Appraisal Institute (MAI) / Oregon Certified General No. C000422

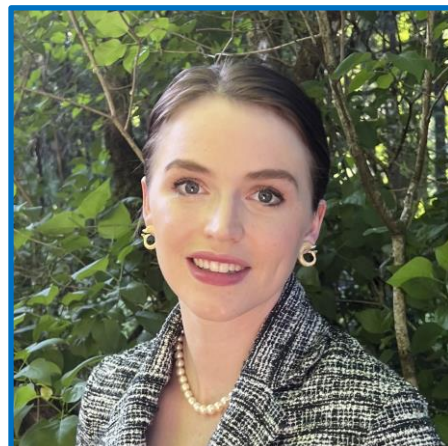


James Robinson is a Certified General Appraiser in both Oregon and Washington. With nearly 20 years of appraisal experience, his expertise extends to the valuation of all property types, making him a versatile asset to our team. A former non-commissioned officer in the US Air Force, Jim studied Business Administration at Fort Steilacoom Community College and Yakima Valley Community College. Commercial real estate appraisal is his second career after many years in the IT industry.

Oregon Certified General No. C001137

Chazya LeCavalier is a Certified General Appraiser in Oregon and Washington. She possesses a Master of Public Administration from the University of Oregon. Before transitioning to commercial appraisal, she garnered valuable experience as a Right of Way Agent at ODOT, specializing in eminent domain appraisal. Her nearly 6 years of appraisal expertise extends to complex property rights such as easements and access.

Oregon Certified General No. C001588



Cost/Fees

1. **Price** - Our total proposed fee is **\$3,800**.
2. **Availability** - Our firm is available to start on this appraisal immediately upon engagement.
3. **Proposed Scope of Work** - The proposed scope of work for this assignment would involve preparing a written Appraisal Report to address the estimated market value of the fee simple interest for 'The Stimson Property' parcel that will be the subject of the appraisal. The parcel will be physically inspected, and an in-depth analysis of the property and its surrounding market area will be undertaken and included in the report, as well as research and reporting of market conditions affecting the subject parcels with analysis and conclusion regarding its highest and best use. Research and analysis will also be conducted to locate comparable sales of parcels with a similar highest and best use in the surrounding market area and, to the extent necessary, expanded to include other similar markets throughout the state. Additionally, the Scope of Work will include the requirements outlined in Section IV: Scope of Services in the Request for Proposals.
4. **Proposed Performance Period** - Delivery of the Appraisal Report will be within the contract period.

Addendum: Resumes

QUALIFICATIONS of PAUL J. MOSCATO, MAI

Professional Memberships

Awarded the MAI Designation, Member of the Appraisal Institute in 2016

Education

Degree: Bachelor of Science in Commerce, 2004
Major: Marketing
Institution: Santa Clara University

Completed the following Appraisal courses:

AI Course 100 GR	Basic Appraisal Principles
AI Course 101 GR	Basic Appraisal Procedures
Van Education Center	15-Hour National USPAP Course
AI Course 300GR	Real Estate Finance, Statistics and Valuation Modeling
AI Course 400G	General Market Analysis/Highest & Best Use
AI Course 401G	General Appraiser Sales Comparison Approach
AI Course 402G	General Appraiser Site Valuation and Cost Approach
AI Course 403G/404G	General Appraiser Income Approach I/II
AI Course 405G	General Appraisal Report Writing and Case Studies
AI Course 330OL	Online Apartment Appraisal Concepts & Applications

Licensing

Oregon State Certified General Appraiser (No. C001107)

Real Estate Experience

2018 -	Principal – Moscato, Okoneski & Associates, Inc.
2012 - 2017	Staff Appraiser – Moscato, Okoneski & Associates, Inc.
2010-2012	Appraiser Assistant – Moscato, Okoneski & Associates, Inc.
2007-2010	Appraiser Assistant – Moscato, Ofner & Henningsen, Inc.

Types of Properties

Commercial Buildings	Condominiums
Industrial Buildings	Commercial Land
Office Buildings	Industrial & Business Park Land
Medical & Dental Office Buildings	Multi-Family Residential Land
Shopping Centers & Retail Stores	Single-Family Residential Land
Apartment Complexes	



Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

PAUL J MOSCATO
MOSCATO, OKONESKI & ASSOCIATES
13765 NW CORNELL RD #200
PORTLAND, OR 97229

License No.: C001107

Issue Date: August 01, 2022

Expiration Date: July 31, 2024

Chad Koch, Administrator

QUALIFICATIONS of T. CHAD PLASTER, JD, MAI

Professional Memberships

Awarded the MAI Designation by the Appraisal Institute in 2012
President, Greater Oregon Chapter of the Appraisal Institute, 2022

Education

Degree: Bachelor of Arts, 1993
Major: Economics
Institution: University of Washington

Degree: Juris Doctor, 1997
Institution: Northwestern School of Law, Lewis & Clark College

Completed the following Appraisal courses/exams:

AI Course 100 GR	Basic Appraisal Principles
AI Course 101 GR	Basic Appraisal Procedures
Van Education Center	15-Hour National USPAP Course
AI Course 300GR	Real Estate Finance, Statistics and Valuation Modeling
AI Course 400G	General Market Analysis/Highest & Best Use
AI Course 401G	General Appraiser Sales Comparison Approach
AI Course 402G	General Appraiser Site Valuation and Cost Approach
AI Course 403G/404G	General Appraiser Income Approach I/II
AI Course 510	Advanced Income Capitalization
AI Exam 530	Advanced Sales Comparison & Cost Approaches
AI Course 540	Report Writing and Valuation Analysis
AI Course 550	Advanced Applications
AI Comprehensive Exam	
AI Course	Litigation Appraising: Specialized Topics & Applications
AI Course	Introduction to Green Buildings: Principles & Concepts

Licensing

Oregon State Certified General Appraiser (No. C001034)
Washington State Certified General Appraiser (No. 1102237)

Experience

2014 -	Principal – Moscato, Okoneski & Associates, Inc.
2012-2014	Senior Staff Appraiser – Moscato, Okoneski & Associates, Inc.
2010-2011	Staff Appraiser – Moscato, Ofner & Henningsen, Inc.
2006-2010	Appraiser Assistant – Moscato, Ofner & Henningsen, Inc.
1997-2006	Attorney – Ramis, Crew, Corrigan & Bachrach, LLP – Portland

Types of Properties

Commercial Buildings	Condominiums
Industrial Buildings	Commercial Land
Office Buildings	Industrial & Business Park Land
Medical & Dental Office Buildings	Multi-Family Residential Land
Shopping Centers & Retail Stores	Single-Family Residential Land
Apartment Complexes	Condemnation & Litigation



THOMAS C PLASTER
MOSCATO, OKONESKI & ASSOCIATES, INC.
13765 NW CORNWELL RD STE 200
PORTLAND, OR 97229

Appraiser Certification and Licensure Board
State Certified General Appraiser
28 hours of continuing education required

License No.: C001034

Issue Date: October 01, 2022

Expiration Date: September 30, 2024

Chad Koch, Administrator

QUALIFICATIONS of BRETT J. OKONESKI, MAI

Professional Memberships

Awarded the MAI Designation, Member of the Appraisal Institute (No. 99480) in 2010

Education

Degree: Bachelor of Science
Major: Finance
Institution: University of Arizona

Partial list of appraisal courses and/or examinations completed:

AI Exam 1A-1	Real Estate Appraisal Principles
State Course G3	Real Estate Appraisal Methods
AI Course USPAP	Nt'l Uniform Standards of Professional Appraisal Practice
AI Course 1BA	Capitalization Theory and Techniques, Part A
AI Course 1BB	Capitalization Theory and Techniques, Part B
AI Exam 520	Highest & Best Use and Market Analysis
AI Exam 530	Advanced Applications
AI Exam 540	Report Writing and Valuation Analysis
AI Exam 550	Advanced Sales Comparison and Cost Approaches

Completed three 45-hour courses in real estate law, real estate finance and real estate practices at University of Arizona.

Licensing

Oregon State Certified General Appraiser (No. C000422)
Washington State Certified General Appraiser (No. 1101820)

Real Estate Experience

2011 -	Principal – Moscato, Okoneski & Associates, Inc.
2007-2011	Principal – Moscato, Ofner & Henningsen, Inc.
1992-2007	Senior Staff Appraiser – Moscato, Ofner & Henningsen, Inc.
1990-1992	Research Assistant – Moscato, Ofner & Associates, Inc.

Types of Properties

Office Buildings	Industrial Buildings
Shopping Centers	Residential Land
Residential Subdivisions	Industrial Land
Apartment Complexes	Commercial Land
Mobile Home Parks	Auto Dealerships
Commercial Buildings	Bank Branches
Medical Office Buildings	Restaurants
Public & Private Golf Courses	Hotels/Motels



BRETT J OKONESKI
MOSCATO, OKONESKI & ASSOCIATES INC.
13765 NW CORNELL RD
PORTLAND, OR 97229

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

License No.: C000422

Issue Date: December 01, 2022

Expiration Date: November 30, 2024

Chad Koch, Administrator

QUALIFICATIONS of JAMES F. ROBINSON

Licensing

Oregon State Certified General Appraiser (No. C001137)
Washington State Certified General Appraiser (No. 1101868)

Experience

October 2018 to Present:	Staff Appraiser – Moscato, Okoneski & Associates – Portland, OR
January 2004 to November 2018:	Fee Appraiser – Speirs de Rose Company – Seattle, WA
September 1988 to December 1999:	Technology Manager – Microsoft Corporation

Real Estate Education

Completed the following Appraisal courses/exams:

National USPAP (2005 through 2020)	Overview of Real Estate Appraisal Principles
Appraisal 101	Appraisal 102
New Technologies for Real Estate Appraisers	Analyzing Operating Expenses
Cost Approach to Commercial Appraising	Sales Comparison Approach
Income Approach	Advanced Income Approach
Market Analysis/Highest & Best Use	Apartment Appraisal Concepts & Applications
Appraising Convenience Stores	Data Verification
Environmental Contamination of Income Properties	REO & Foreclosures
Private Appraisal Assignments	Real Estate Acquisition under the Uniform Act
Eminent Domain & Condemnation	Small Hotel/Motel Valuation
Retail Shopping Centers	Avoiding Mortgage Fraud
Appraising Owner-Occupied Commercial Properties	Appraising Self Storage Facilities
Appraisal of Industrial Incubators	Appraisal of Land Subject to Ground Leases
Appraisal of Fast-Food Facilities	FHA Single Family Appraisal
Business Practices & Ethics	Supervisor – Trainee Course (OR & WA)
Land and Site Valuation	Market Disturbances Appraisal
Commercial Appraisal Review	

Variety of Appraisal Assignments

James has experience in the valuation of office buildings, commercial condominiums, medical/dental buildings, industrial properties, shopping centers, retail stores, retail strip centers, fast food restaurants, RV & mobile home parks, vehicle sales & service, mixed-use commercial/residential & apartment buildings, commercial and industrial land and many special purpose property types. Assignments have been completed in urban as well as rural locations.

Military Experience

Non-Commissioned Officer, United State Air Force 1974-1980



JAMES F ROBINSON
MOSCATO, OKONESKI & ASSOCIATES INC.
13765 NW CORNELL RD #200
PORTLAND, OR 97229

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

License No.: C001137

Issue Date: October 01, 2022

Expiration Date: September 30, 2024

Chad Koch, Administrator

QUALIFICATIONS of CHAZYA LECAVALIER

Licensing

Oregon State Certified General Appraiser (No. C001588)

Education

Master of Public Administration – University of Oregon – 2017

M.S. Conflict and Dispute Resolution – University of Oregon – 2017

B.S. Communication Studies – Oregon Institute of Technology – 2014

Experience

April 2022 to Present: Appraiser Assistant – Moscato, Okoneski & Associates – Portland, OR

July 2020 to March 2022: Appraiser Assistant – Oregon Valuation Group – Portland, OR

October 2017 to June 2020: Right of Way Agent – Oregon Dept. of Transportation – Bend, O

Real Estate Education

Completed the following Appraisal courses/exams:

- Advanced Income Capitalization
- General Appraiser Income Approach 1
- General Appraiser Income Approach 2
- General Appraiser Site Valuation and Cost Approach
- Real Estate Finance, Statistics, and Valuation Modeling
- General Appraiser Sales Comparison Approach
- General Appraiser Market Analysis and HBU
- IRWA 421: The Valuation of Partial Acquisitions
- IRWA 403: Easement Valuation
- IRWA 803: Eminent Domain Law Basics
- IRWA100: Principles of Land Acquisition
- IRWA103: Ethics and the ROW Profession
- IRWA 400: Principles of Real Estate Appraisal
- National USPAP 15-Hour Course
- National USPAP 7-Hour Course

Variety of Appraisal Assignments

Chazya's expertise focuses on eminent domain appraisal for government agencies. She has appraised partial takings, easements, accesses, and other complicated property interests for infrastructure projects. Chazya has experience in the valuation of office buildings, medical/dental buildings, industrial properties, shopping centers, retail stores, retail strip centers, mixed-use commercial/residential & apartment buildings, and commercial and industrial land.



CHAZYA J LECAVALIER
MOSCATO, OKONESKI & ASSOCIATES
13765 NW CORNELL RD, STE #200
PORTLAND, OR 97229

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

License No.: C001588

Issue Date: July 01, 2023

Expiration Date: June 30, 2025

Chad Koch, Administrator

Proposal

Urban Renewal Agency of Oregon City

RFP – Real Estate Appraisal & Commercial Economic Analysis Professional Services

Please direct all questions, comments, and awards to:

Marc George Nassif, MAI, LEED AP, MRICS
Senior Managing Director
42 Watson Street, Suite C, Detroit, MI 48201
P [734-462-0700](tel:734-462-0700) **C** [248-496-6787](tel:248-496-6787)
E mnassif@bbgres.com

June 27, 2024

James Graham, CEcD
Economic Development Manager
Urban Renewal Agency of Oregon City
625 Center Street
Oregon City, OR 97045
jgraham@orccity.org
503-196-1552

RE: RFP – Real Estate Appraisal & Commercial Economic Analysis Professional Services

Mr. Graham,

BBG is confident that our combination of valuation and assessment services will provide industry-leading expertise for this assignment. You will have a single point of contact to coordinate all our staff and ensure an efficient use of your time.

Who is BBG?

We're the largest independent commercial real estate due diligence company in the nation offering valuation, engineering, environmental, survey, zoning, and construction monitoring services.

What do we do?

BBG completes over 40,000 engagements annually.

Why hire us?

We don't do anything with commission-based compensation. We provide independent and clear answers to our clients' questions without basing our earnings on their decisions.

In response to the RFP, we have prepared this overview of BBG, our experience and capabilities. BBG, Inc. is a national real estate services firm headquartered in Dallas, Texas with 50 offices nationwide. We offer services in actively to more than 4,500 clients including investors, lenders, attorneys, accountants, corporations, and several municipal agencies. Over the past 14 years, BBG's employee roster has grown from a dozen or so team members to over 500 professional employees, many of whom are MAI designated and LEED certified. BBG's predecessor, Butler Burgher Group, was formed in 2009 as a commercial real estate valuation and appraisal firm. In 2015, the company was re-organized to form BBG, Inc. and our subsidiary firm, BBG Assessments, LLC. BBG, Inc. operates as the Appraisal and Valuation consulting group, while BBG Assessments, LLC operates as the Engineering and Environmental consulting group. BBG, Inc. is 100% owned by BBG Intermediate Holding, Inc. BBG has extensive firm experience providing appraisal services for municipal agencies across the country. Current and prior municipal clients include:

Port Authority of New York and New Jersey
New York State DOT
City of Phoenix Fire Department

City of Sacramento, CA
City of Plano, TX
New Orleans Regional Transit Authority

Mississippi DOT
City of Charlotte, NC
Township of Rockaway, NJ
City of Philadelphia, PA
Johnson County, KY
Wasatch County, UT
Utah DOT
City of Orlando, FL
City of Houston, TX
Borough of Lincoln Park, NJ
Wayne County Stadium Authority
Palm Springs, CA

Norfolk Airport Authority
Township of Parsippany-Troy Hills, NJ
Texas DOT
United States Postal Service
Amtrak
Tennessee Valley Authority
Rochester Genesee Regional Transportation Authority
United States Army Corps of Engineers
Borough of Ramsey, NJ
Wasco County, OR
City of Detroit, MI

A major differentiator for BBG is that we are not an insurance firm, we complete over 40,000 appraisals annually. We also complete property condition reports, ALTA surveys, environmental reports, and cost monitoring reports. We have the same databases and manuals as our competitors, but we support this data with real-time market transactional data. This gives us a unique viewpoint which leads to more credible opinions.

BBG has completed approximately 500 valuation projects in Oregon over the past year.

I will serve as the contractual point-of-contact for this engagement and have authorization to make representations on behalf of the firm and to bind the firm. Kurt Plaster, MAI will complete the appraisals. Qualifications for Kurt and his team are included herein.

BBG can complete this assignment for a fee \$3,900

Our firm appreciates the opportunity to bid on this assignment and we look forward to being able to bring the expertise of licensed appraisers, professional engineers, property inspectors and information technology staff together to provide quality service to URA of Oregon City. If you have any questions, please don't hesitate to contact me.

Sincerely,



Marc G. Nassif, MAI, LEED AP, MRICS
Senior Managing Director
mnassif@bbgres.com
248-496-6787

Company Overview

BBG OVERVIEW

BBG is one of the nation's largest real estate services provider with 50 offices across the country serving more than 4,500 clients. We deliver best-in-class valuation, advisory and assessment services with a singular focus of meeting our clients' needs.

Our professional team offers broad industry expertise and extensive market knowledge to help clients meet their objectives throughout the real estate life cycle.

BBG clients include commercial real estate professionals, investors, lenders, attorneys, accountants and corporations.

THE BBG DIFFERENCE

National Footprint. BBG is one of the most reputable national firms offering in-house valuation and assessment services for all commercial property types.

Customer-focused Growth. BBG has grown to become one of the largest national due diligence providers through our commitment to best-in-class work products, outstanding customer service and ability to streamline the due diligence process.

Qualified Team. Our nationwide team includes valuation professionals with deep industry expertise and over 50 percent being MAI designated. Our assessment team is comprised of professional engineers, registered architects and licensed geologists, among other licensed professionals.

Unbiased Independence. By focusing exclusively on due diligence services, BBG guarantees an independent perspective free from potential conflicts of interest.

Innovative Technology. BBG has made significant investments in information technology and analytics to continually improve our data and report quality.

SERVICES

Valuation

- + Appraisal Services – Single Asset & Portfolios
- + Appraisal Review
- + Appraisal Management
- + Arbitration & Consulting
- + Estate Planning
- + Evaluation
- + Feasibility Studies
- + Highest and Best Use Studies
- + Insurance Valuation
- + Investment Analysis
- + Lease and Cost Analysis
- + Litigation Support
- + Tax Appeals
- + Valuation for Financial Reporting

Advisory

- + ASC 805 Business Combinations
- + ASC 840 Leases
- + Purchase Price Allocations
- + Portfolio Valuations for Reporting Net Asset Values (NAV)
- + Public and Non-traded REIT Valuations
- + Valuations for Litigation and Litigation Support
- + Sale-Leaseback Valuation Analysis
- + Valuations for Bankruptcy/Fresh Start Accounting
- + Cost Segregation Analysis

Assessment

- + Environmental Due Diligence
 - + Phase I/II ESA
 - + TSA, RSA, and other Streamlined Services
- + Property Condition Reports
 - + Debt/Equity
- + Construction Risk Management
- + Energy Efficiency Services
- + HUD
- + Indoor Air Quality
 - + IAQ/Radon
 - + ACM/LBP
- + Seismic Services
- + Suvey Services
- + Zoning Services

Profile

Kurt Plaster is a Managing Director with BBG in the Portland, Oregon office. He is engaged in business development and client outreach for the Portland office. He participates in office management and supervises and provides counsel to appraisers and staff. He reviews and signs reports, acts as a principal appraiser in assignments and works independently or in collaboration with appraisers and analysts.

Kurt has more than 16 years of experience in providing commercial and residential appraisals and consultation services for all types of real property and real property interests. Services performed include the appraisal, appraisal review, and / or consultation for acquisition / disposition, financing, estate, arbitrations, mediations, buy/sell agreements, development, condemnation, fractional interest, and court testimony purposes. Typical clients served are financial institutions, investors, developers, legal & accounting firms, and government entities.

Professional Affiliations

Appraisal Institute

Member (MAI) Appraisal Institute

Director: Appraisal Institute Greater Oregon Chapter

Appraisal Institute Candidate Advisor

Manufactured Housing Communities of Oregon: Associate Member

Columbia Corridor Association Member

General Certified Appraiser:

State of Oregon (License No. C001003)

State of Washington (License No. 1102120)

State of Idaho (License No. CGA-5638)

Education

Brigham Young University, Bachelor of Science, Communications

Minor Business Administration

Profile

Chris is a Director with BBG in the Portland, Oregon office. He began his appraisal career in 2003, appraising a variety of properties throughout Oregon and Washington. He supervises and works in collaboration with appraisers and analysts. Typical clients served are financial institutions, investors, developers, legal firms, and government entities.

Chris has established competency in major property types while developing expertise in office buildings, both suburban and CBD, as well as medical/dental offices. Other property types include retail buildings and shopping centers, manufacturing and warehouse industrial buildings, mixed-use developments, hotel and motel hospitality properties, multifamily properties, and commercial and residential land. Services performed include the appraisal and/or consultation for acquisition/disposition, financing, and market rent determinations.

Professional Affiliations

Appraisal Institute
MAI, Designation

General Certified Real Estate Appraiser:
State of Oregon (License No. C000935)
State of Washington (License No. 1102371)

Education

Bachelor of Science, University of North Carolina, Charlotte, NC

Profile

Christopher Durek is the Director of Institutional Practice for the West Region at BBG's San Francisco office. Mr. Durek's experience includes a wide variety of commercial appraisal assignments in California, Oregon, and Washington. His experience includes research, valuation and consulting analysis. Clients on these assignments include banks and financial institutions, life insurance companies, pension funds and pension fund advisors, conduits, developers and investors, law and accounting firms, businesses/corporations and government. Mr. Durek's primary work is complex assignments for institutional clients, with a focus on large office, research and development, industrial, medical, and life science properties. Specialized services include portfolio valuations and institutional grade property valuations. He holds the Certified General Appraisal license from the states of California, Oregon, and Washington, and is in pursuit of the MAI designation.

Professional Affiliations

General Certified Appraiser

State of California (License No. 3004321)

State of Oregon (License No. C001351)

State of Washington (License No. 1102517)

Education

Business Administration in Finance, University of Washington, Seattle WA

Juris Doctor, Seattle University School of Law, Seattle, WA

Numerous professional practice and real estate related courses.



Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

KURT K PLASTER
BBG INC.
1220 SW MORRISON ST, STE 800
PORTLAND, OR 97205

License No.: C001003

Issue Date: June 01, 2023

Expiration Date: May 31, 2025

Chad Koch, Administrator

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

CHRISTOPHER J HARTMAN

BBG INC

8343 DOUGLAS AVE, STE 700

DALLAS, TX 75225

License No.: C000935
Issue Date: January 01, 2024
Expiration Date: December 31, 2025



Chad Koch, Administrator

28 hours of continuing education required

**CHRISTOPHER M DUREK
BBG INC**

**8343 DOUGLAS AVE, 7TH FLOOR
DALLAS, TX 75225**

License No.: C001351
Issue Date: May 01, 2024
Expiration Date: April 30, 2026


Chad Koch, Administrator

A photograph of three construction workers walking away from the camera on a dirt path at a construction site. They are wearing hard hats and high-visibility vests. The worker on the left wears an orange vest, while the other two wear yellow-green vests. In the background, there is a large building under construction with visible steel beams and a crane.

A PROPOSAL TO PROVIDE REAL ESTATE APPRAISAL &
COMMERCIAL ECONOMIC ANALYSIS PROFESSIONAL
SERVICES FOR

Urban Renewal Agency of Oregon City

JUNE 25, 2024



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Statement of Qualification





Tel: 206-382-7777
Fax: 206-624-7579
www.bdo.com

BDO USA, PC
601 Union Street
Suite 2300
Seattle, WA 98101

June 25, 2024

Mr. James Graham
Economic Development Manager
Economic Development Department
Urban Renewal Agency
City of Oregon City
625 Center Street
Oregon City, OR 97045-0304

Dear Mr. Graham,

Throughout this proposal and during our conversations with you, we will demonstrate how BDO is uniquely qualified to be your valuation service provider. When working with us you will be engaging valuation advisors who have extensive experience and strong technical capabilities. In addition, the core values of Integrity, Flexibility, Excellence, and Accountability have guided our organization since inception and are evident in our people and our work.

The Valuation & Capital Market Analysis practice is committed to provide you with outstanding service. Part of our commitment to client satisfaction includes working with clients to understand your needs and goals. We believe that being part of a 100-year heritage as a CPA and professional services firm, our full-service capabilities and our extraordinary responsiveness distinctly qualifies us to serve you in this capacity. BDO's dedicated team of highly experienced professionals is determined to help you achieve your organizational and technical objectives.

Once again, thank you for the opportunity to present our proposal for your consideration. If you have any questions, please do not hesitate to contact us. We look forward to building a mutually rewarding, long-term relationship with you.

Sincerely,

Wayne Horvath, MAI
Managing Director
Authorized Representative

whorvath@bdo.com
Direct: 215-636-5557

Jeff W. Briggs, ASA, MAI, MRICS
Director
Engagement Leader / Licensee

jbriggs@bdo.com
Direct: 214-459-1400



About BDO

As a global business advisor, we work collaboratively across the world to deliver insight-driven perspectives through a comprehensive array of assurance, tax, and advisory services—where and when you need us.

BDO USA *



75+
Offices



840+
Principals



11,950+
Total Personnel

\$2.89 billion revenues

43% Assurance | 39% Tax | 18% Advisory and Other

5.6% increase over last year

* Year-over-year percentages capture changes from 12/31/22 to 12/31/23 and reflect BDO USA's fiscal year-end moving from 4/30 to 12/31.

BDO INTERNATIONAL **



160+
Countries



1,700+
Offices



8,000+
Partners and Principals



115,600+
Total Personnel

\$14 billion revenues

42% Accounting and Audit | 23% Tax | 35% Advisory

Year-over-year 10.2% growth rate at constant exchange rates

** BDO International statistics for the year ended September 30, 2023. Locations include exclusive alliances of BDO Member Firms.

◀ ⌂ ≡ ▶

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BDO Pacific Northwest



Helping our Pacific Northwest clients thrive.

Known for its temperate rain forests, rugged coastlines, and towering trees, the economy is grounded in lumber production, aviation, shipbuilding, and technology. Seattle and Spokane serve as the cultural and economic hub for one of the wealthiest states in the nation, and they are home to myriad of performing arts, theater, and music organizations. Our Seattle and Spokane offices provide strategic assurance, tax, and advisory services to clients across Washington and the Pacific Northwest, offering direct access to our national and global resources. We can help you discover opportunities, build resilience, and achieve your goals.

BDO PACIFIC NORTHWEST BY THE NUMBERS



Over **200** professionals,
including over **105** CPAs



21 principals



4,270+ clients served out of
the Washington offices

GLOBAL LEADERS IN YOUR BACKYARD

Our valuation practice operates both nationally and internationally, boasting a team of 8 licensed certified general real estate appraisers, five of whom hold the MAI designation. They serve clients across the USA, including the Pacific Northwest and Oregon.

INDUSTRY BREAKDOWN



Valuation & Capital Market Analysis Services

We recognize that valuation isn't just quantifying. It's understanding - the future of a business, the impact of an event, the advantage of an asset, the possible outcomes for any kind of transaction. We provide guidance through all stages of valuation and capital market analysis needs, helping companies across industries identify and evaluate opportunities, and execute on them.



BUSINESS CASE ASSESSMENTS & FEASIBILITY STUDIES

- ▶ Market and financial analysis
- ▶ Technical and operational feasibility
- ▶ Legal and regulatory analysis
- ▶ Environmental analysis
- ▶ Social and community impact
- ▶ Competitive analysis

ECONOMIC & FINANCIAL INTELLIGENCE

- ▶ Macroeconomic indicators
- ▶ Economic forecasts
- ▶ Industry analysis
- ▶ Economic policy analysis
- ▶ Data analytics and modeling
- ▶ Regulatory and compliance intelligence

INFRASTRUCTURE ADVISORY & PUBLIC-PRIVATE PARTNERSHIPS

- ▶ Project feasibility
- ▶ Risk assessment and mitigation
- ▶ Regulatory and legal guidance
- ▶ Transportation infrastructure
- ▶ Social infrastructure
- ▶ Energy and utilities
- ▶ Information technology

VALUATION SERVICES

- ▶ Financial Instrument Valuation
- ▶ Portfolio Valuation
- ▶ Purchase Price Allocation
- ▶ Fairness Opinions
- ▶ Litigation Support
- ▶ Financial Reporting
- ▶ Real Estate Valuation

FINANCIAL MODELING & QUANTITATIVE ANALYSIS

- ▶ Data analysis
- ▶ Financial modeling
- ▶ Discounted cash flow (DCF) analysis
- ▶ Market multiples
- ▶ Sensitivity analysis
- ▶ Scenario analysis

Real Estate Valuation

BDO's Real Estate practice can provide all-inclusive, dependable valuation services for a broad range of real property assets, spanning agricultural land to hotel properties. Our professionals hold the highest level of real estate appraisal relevant credentials, including, but not limited to, the Appraisal Institute's MAI designation, the Royal Institution of Chartered Surveyors MRICS designation and the American Society of Appraisers ASA designation.

PROPERTY TYPES INCLUDE

Office

- ▶ Corporate Headquarters
- ▶ Investment Properties

Industrial

- ▶ Warehousing and Distribution Centers
- ▶ Manufacturing Facilities
- ▶ Office/Showrooms
- ▶ Research & Development

Retail

- ▶ Big Box Retailers
- ▶ Shopping Centers
- ▶ Fast Food Restaurants
- ▶ C-Stores/Gas Stations/Car Washes

Multifamily

- ▶ Apartments
- ▶ Condominium Developments

Hotels

Healthcare

- ▶ Hospitals
- ▶ Senior Housing/Assisted Living

Subdivision Analysis

Special Use Properties

- ▶ Semiconductor Manufacturing Facilities
- ▶ Power Plants
- ▶ Refineries
- ▶ Bulk Fuel Facilities
- ▶ Theme Parks
- ▶ Marinas
- ▶ Resorts
- ▶ Mining Properties
- ▶ Schools/Universities

RELEVANT CLIENTS

- ▶ Miwok Indians Development Corporation, Shingle Springs, CA
- ▶ Eastern Shoshone Tribe, Fort Washakie, WY
- ▶ Southland Water Agency, IL
- ▶ City of West Lake Hills, TX
- ▶ West Mifflin Brough, PA
- ▶ City of West Palm Beach, FL
- ▶ City of Fort Lauderdale, FL
- ▶ City of North Miami, FL



BDO Leaders Serving Oregon City

Choosing the right professionals to serve you is a critical element of success. In selecting your core service team, we carefully reviewed our understanding of your needs and identified a group with the right credentials. For more information about our team's technical qualifications and client experience, please refer to the team leaders' qualifications section of our proposal, which includes detailed biographies.

Oregon City needs professionals who are responsive to your needs, technically adept, understand your growth plans, and will meet mutually-established deadlines. BDO provides you with such professionals through one central point of contact: Jeff Briggs, ASA, MAI, MRICS.



Jeff Briggs
Director
Engagement Lead
Licensee



Wayne Horvath
Managing Director
Authorized
Representative



Charles Wilson
Senior Manager
Project Lead



Jaclyn DeSantis
Manager
Staffing Lead



Jeff Briggs, ASA, MAI, MRICS
Director
Engagement Leader / Licensee
jbriggs@bdo.com
Direct: 214-459-1400

Jeff is a Director in the Valuation and Capital Market Analysis practice in the firm's Dallas office. He has extensive experience with the valuation of investment and user-based specialized real estate. He has completed assignments for various purposes including property tax, financial reporting, financing, purchase or sale, insurance, fair rental, tax reporting, donation, and a variety of litigation support matters.

Jeff's valuation experience includes all types of commercial properties including industrial (both manufacturing and distribution), office buildings, retail centers, neighborhood and community shopping centers, apartments, hotels, and daily-fee and private golf facilities. He has appraised various land holdings including urban and suburban commercial land tracts, commercial subdivisions, single-family residential subdivisions, farms, ranches, and conservation easements. He is a certified general appraiser in 21 U.S. states including New Mexico. Clients include private and corporate owners, public and private REIT's, pension funds and commercial lenders.

Special-purpose property valuations he has performed include the land underneath a professional sports stadium in both the US and in the UK, several marine docking and crude transfer terminals, steel rolling and pipe mills, a particle and fiber board processing plant, and a paper mill. His healthcare work includes general acute care, rehabilitation, and specialty hospitals, ambulatory surgical centers, clinics, and medical office buildings. He also has substantial experience in agribusiness-related properties including animal feed mills, food processing facilities, dairies, fruit packing plants, frozen food storage facilities, wineries, farms, ranches and beef, pork, chicken and sheep production facilities. Jeff has completed assignments in more than 30 states.

PROFESSIONAL AFFILIATIONS

Accredited Senior Appraiser, American Society of Appraisers; Past President of the Dallas/Fort Worth Chapter (2017 through 2020)

MAI designation, Appraisal Institute; former president of the North Texas Chapter (2014). Other chapter positions include Chairman of the Education Committee; and in 2015 Chairman of the Nominating Committee

Professional Member, Royal Institute of Chartered Surveyors

EDUCATION

B.B.A., North Texas State University (now known as the University of North Texas)



Wayne Horvath, MAI
Managing Director
Authorized Representative
whorvath@bdo.com
Direct: 215-636-5557

Wayne is a Managing Director in the Valuation and Capital Market Analysis practice. He has experience in the valuation of real properties and portfolios at the national level and has appraised properties in many states throughout the U.S. He has provided valuation services for financial reporting, performance reporting, acquisition/disposition consultation, mortgage submission, tax appeal, condemnation, fair rental analysis, estate planning and donation, and a variety of litigation support matters. He also performs advisory services including support for litigation, appraisal review, market research, and offer/option analysis.

Property types Wayne has appraised consist of multifamily residential properties including market rate and subsidized housing; retail property; office buildings including medical offices; industrial facilities including manufacturing, warehousing/distribution, and flex space; various forms of retail; data centers; hospitality; special purpose properties; land holdings including developments, individual lots, subdivisions, and agricultural land; institutional facilities; and high-value residential properties, among others. Property interests he has valued include fee simple, leased fee and leasehold estates. He has provided opinions for the valuation of open market exchanges, forced liquidation, fair accounting and going concern.

Prior to joining BDO, Wayne served as a Director at Duff & Phelps and American Appraisal providing similar services nationally. He was also a real estate appraiser and analyst at an independent appraisal firm providing valuation services throughout the state of New Jersey. Wayne also worked at the Center for Urban Policy Research (CUPR) at Rutgers University where he was responsible for organizing, prioritizing and planning the possible timing and potential funding sources for Capital Improvement Plans. In addition, he was involved in research and writing for the Impact Assessment of the New Jersey State Plan.

PROFESSIONAL AFFILIATIONS

Designated Member, Appraisal Institute; Member, Urban Land Institute (ULI); and Individual Member, NAREIT

EDUCATION

B.A., Urban Planning and Public Policy, Rutgers University



Charles L. Wilson, MAI, CCIM, MRICS
Senior Manager
Scope Leader
clwilson@bdo.com
Direct: 310-203-1279

Charles Wilson is a Senior Manager in the Valuation and Business Analytics practice focusing on commercial real estate valuation and advisory of institutional and SME real property throughout the USA. He has 20 years of professional experience providing financial reporting valuation, portfolio valuation, appraisal review, valuation management, dispute resolution, litigation support, and due diligence services.

Charles has extensive experience in all major commercial real estate asset classes including multifamily, retail, office and industrial property types. His areas of specialization include hospitality, shopping center, student housing and manufactured housing property types.

Prior to joining BDO, Charles held senior valuation and advisory roles with Houlihan Lokey and Altus Group where he served pension, investment and private equity fund clientele on various large and complex valuation and valuation management engagements. He also held a senior Deputy Assessor position within the Los Angeles County major real property division.

Charles is currently a Commissioner of the Sustainable Burbank Commission, and formerly has served as a committee member of the Community Development Goals Committee, City of Burbank.

PROFESSIONAL AFFILIATIONS

MAI Designee Member, Appraisal Institute

Certified Commercial Investment Member (CCIM Designee), CCIM Institute

MRICS Designee Member, Royal Institution of Chartered Surveyors

EDUCATION

M.B.A., California State University Long Beach

B.S., Electrical Engineering, California State University Long Beach



Jaclyn DeSantis
Manager
Staffing Leader
jdesantis@bdo.com
Direct: 760-448-8143

Jaclyn DeSantis is a manager in the Valuation & Capital Market Analysis practice based in San Diego. She has professional experience performing portfolio valuation, consulting and advisory services throughout the United States and abroad.

Jaclyn has experience working with all major property types, specializing in hospitality properties, and including industrial, office, retail, multifamily, and residential. She has worked on a variety of engagement types, with a recent focus on real estate valuation analysis and consulting services for gift & estate tax planning, financial reporting, acquisitions, dispositions, and feasibility studies. Her clients have included pension funds, asset managers, private investors, private equity & venture capital firms, and real estate developers.

Prior to joining BDO, Jaclyn worked for a Big Four firm as a Senior Associate in the Economic and Valuation Services Practice on the real estate team where she provided valuation analysis and consulting services for corporate mergers, acquisitions, dispositions, financing, portfolio management, and financial reporting.

PROFESSIONAL AFFILIATIONS

American Hotel & Lodging Association - Member & ForWard Ambassador

Practicing Affiliate with the Appraisal Institute

EDUCATION

B.A., Economics, California State University; Long Beach

Professional Fees

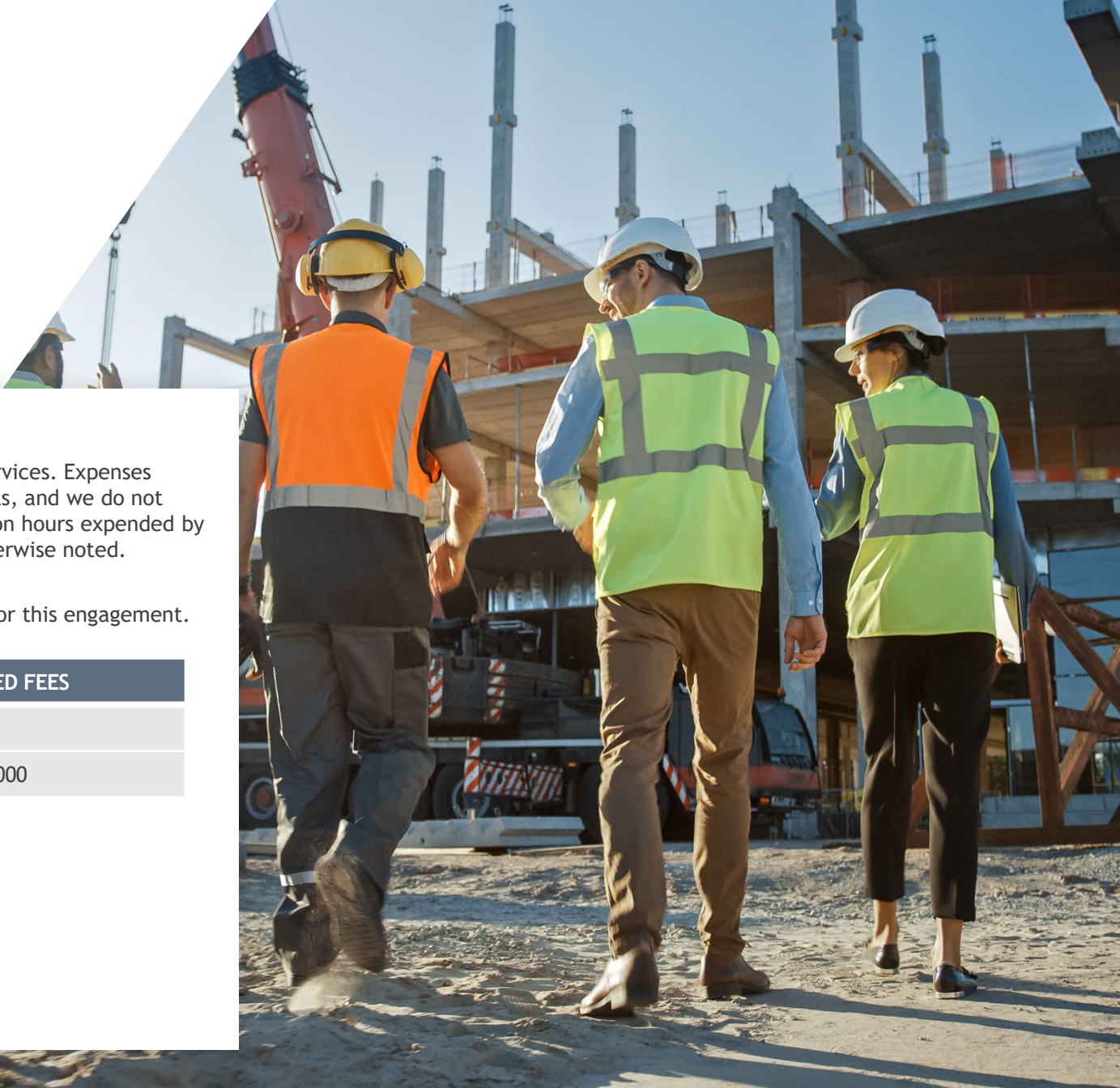
WE ARE COMMITTED TO QUALITY, VALUE-ADDED SERVICE

We have provided hourly rates and other fees pertaining to the performance of our services. Expenses incurred on your behalf will also be billed. Our fees are not contingent upon the results, and we do not warrant or predict results or final developments in this matter. Our fees are based upon hours expended by each assigned staff member extended by the applicable hourly billing rate, unless otherwise noted. Payment terms and other details will be noted in our retention agreement.

Based on our experience with similar engagements, we can reasonably estimate fees for this engagement.

SCOPE OF WORK	ESTIMATED FEES
Service	
▶ Real Estate Appraisal and Economic Analysis Services	\$32,000

The fees quoted above are for a full comprehensive valuation report.



Scope of Services

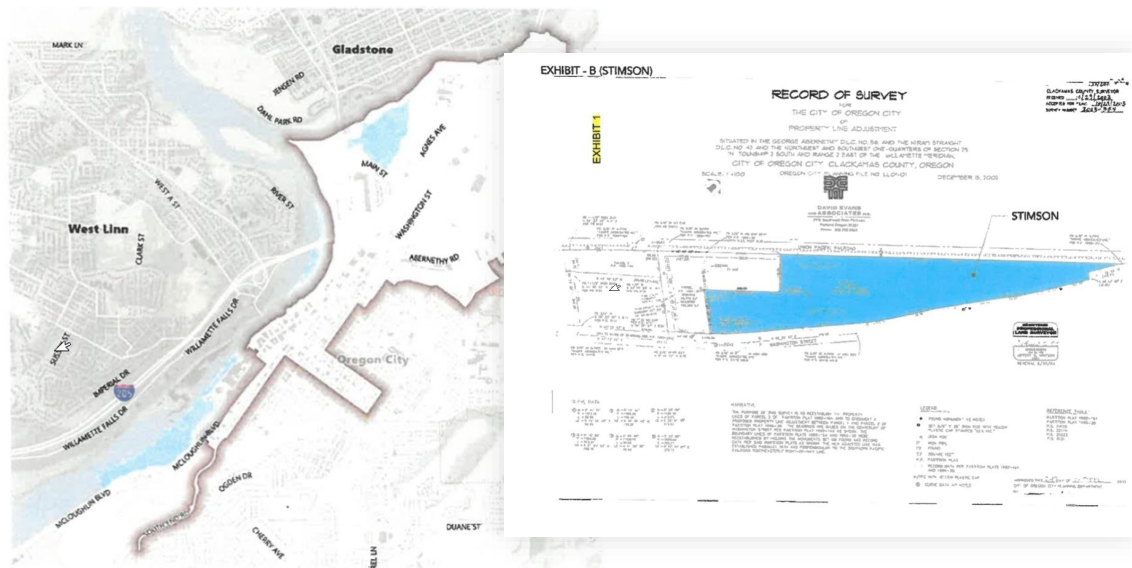


Scope of Services

This valuation will be performed to assist the Urban Renewal Agency, City of Oregon City, in establishing an independent and professional opinion of the market value as of current time (the “Valuation Dates”) of the following real property asset: a development site known as The Stimson Property (the “Subject Property”), located at 1795 Washington Street, Oregon City, OR 97045.

The intended user of the valuation report will be the Urban Renewal Agency, City of Oregon City, and the valuation report will be prepared for economic development planning purposes.

The appropriate property rights will be appraised for the subject property, and the suitable definition of market value will be determined for this engagement.



The scope of work will include, but is not limited to:

- ▶ Collecting, reviewing and analyzing real property data to include:
 - Property boundaries
 - Right of way, easements and relevant agreements
 - Circulation, access and traffic reports
 - Adjacent land uses
 - Allowable land uses including zoning and other policy restrictions
 - Environmental assessment, and geo-technical services data
 - Market data and market area conditions
- ▶ Site inspection of the subject property and urban renewal area
- ▶ Level B/C Market Analysis of probable uses for the subject property (i.e. hotel, etc.)
- ▶ Detailed highest and best use analysis of the probable uses (i.e. hotel, etc.)
- ▶ Valuation analysis of all probable uses that are feasible by applying all applicable approaches to value including the sales comparison, cost and income approaches
- ▶ Appraisal Report (USPAP Standard 2-2a).

Excluded from our valuation analysis services are the following:

- ▶ Equipment, contents and personal property
- ▶ Any non-landlord owned building fixtures

Scope of Services

PROFESSIONAL STANDARDS

Where appropriate, our valuation professionals adhere to the Statement on Standards for Valuation Services No. 1 issued by the American Institute of Certified Public Accountants (AICPA) and / or the Uniform Standards of Professional Appraisal Practice (USPAP) issued by The Appraisal Foundation. This valuation opinion will be fully documented by a work file created for retention/review under USPAP.

TIMING

We plan to conduct our engagement in two phases:

Phase One's deliverable will be financial schedules detailing preliminary valuation conclusions.

Phase Two's deliverable will be a full draft report, with accompanying financial schedules, that provides an overview of our valuation process and a description of valuation methodologies and assumptions utilized. The appraisal will include an executive summary which provides a high-level easy to understand logically sequential summary of the methods used, and clear rationale for the determination of probable uses and market value. The report will contain the necessary written narrative, exhibits to support the conclusions, and written explanations of data analysis.

We estimate our **Phase One** deliverables to be available in approximately **8 to 10 weeks** after the receipt of all pertinent data. **Phase Two** deliverables will be available approximately **2 to 4 weeks** after given authorization to proceed after Phase One.

This timing can be adjusted to meet engagement needs.



About BDO USA

Our purpose is helping people thrive, every day. Together, we are focused on delivering exceptional and sustainable outcomes and value for our people, our clients and our communities. BDO is proud to be an ESOP company, reflecting a culture that puts people first. BDO professionals provide assurance, tax and advisory services for a diverse range of clients across the U.S. and in over 160 countries through our global organization.

BDO is the brand name for the BDO network and for each of the BDO Member Firms. BDO USA, P.C., a Virginia professional corporation, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. For more information, please visit: www.bdo.com.

This document contains information that is proprietary and confidential to BDO USA, P.C., the disclosure of which could provide substantial benefit to competitors offering similar services. Thus, this document may not be disclosed, used, or duplicated for any purposes other than to permit you to evaluate BDO to determine whether to engage BDO. If no contract is awarded to BDO, this document and any copies must be returned to BDO or destroyed.

Material discussed is meant to provide general information and should not be acted on without professional advice tailored to your needs.

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STATEMENT OF QUALIFICATIONS (SOQ)

For Real Estate Appraisal & Commercial Economic Analysis
RFP No. EcDev 2024.3

June 27, 2024

Prepared For:

James Graham
Economic Development Manager
Urban Renewal Agency, City of Oregon City
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Prepared By:

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COVER LETTER



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CBRE, Inc.
Valuation & Advisory Services

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James Graham
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Urban Renewal Agency, City of Oregon City
625 Center Street
Oregon City, OR 97045
jgraham@orccity.org

Mr. Graham,

We are pleased to present to the City of Oregon City (City) the following response to the Request for Proposals (RFP) for Real Estate Appraisal & Commercial Economic Analysis – RFP NO. ECDEV 2024.3, released June 11, 2024, with a submission deadline of 5:00 p.m. on Thursday, June 27, 2024. We are well-equipped to provide professional real estate appraisal services in support of the City for the contracted term of (5) months.

CBRE professionals have provided appraisal services for various public and private entities in numerous areas of the Pacific Northwest, United States. These include completing market analysis and appraisals for oil & gas pipelines, road & highway projects, high voltage electric transmission lines, rail projects, water lines, and other projects which involve the acquisition or disposition of real property. In connection with these projects, CBRE professionals have also served as expert witnesses in county, state, and federal courts.

CBRE's efforts will be centered on a profound respect for Property Rights. This includes both the private property owner's right to full use and enjoyment of their property and the condemnor's right to acquire all necessary property rights for public use. This perspective will guide CBRE's efforts to value real estate and to minimize the cost of litigation.

CBRE Vice President, Genesee Borges is authorized by CBRE to contractually obligate our organization and negotiate the contract on behalf of CBRE, Inc. Ms. Borges can be reached at the contact information referenced in our letterhead and via telephone at (503) 449-4913.

Attached you will find our response to this opportunity. We certify that all of the information submitted within this response is accurate. Should you have any questions please contact us at the number listed below and we appreciate this opportunity to be of service.

Best regards,

CBRE
VALUATION & ADVISORY SERVICES

A handwritten signature in blue ink that reads "Genesee Borges". The signature is fluid and cursive, with the first and last names being clearly legible.

Genesee Borges,
Vice President
T: (503) 449-4913
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FIRM OVERVIEW

The applicant is CBRE, Inc. Valuation & Advisory Services (VAS) Group. CBRE, Inc. is the largest commercial real estate services and investment firm in the world tracing its roots to San Francisco in 1906. CBRE is based in Dallas, Texas and operates more than 500 offices worldwide and has clients in more than 100 countries. Likewise, the proponent's VAS group represents the largest appraisal firm in the world with more than 3,000 valuation professionals, completing in excess of 470,000 real estate valuation and advisory assignments each year. Proponent's principal office and office responsible for appraisal services for this project will be in 1300 SW Fifth Avenue, Suite 3500 Portland, OR 97201.

Additionally, CBRE is publicly traded, operates as a corporation, and has been a Fortune 500 company since 2008 (ranked #135 in 2024). CBRE, Inc. rose to #3 on the Baron's 2024 list of 100 most sustainable companies in the U.S., out of the 1,000 largest publicly traded companies by market value. CBRE was the #1 real estate company on the list, which recognizes U.S. corporations that outperform their peers on issues related to employee relations, ethical practices, community support and shareholder performance. Also, CBRE has also been the number one real estate brand by The Lipsey Company for 23 consecutive years.

Our large staff allows for extreme flexibility in scheduling, as well as quick response and delivery times. Our highly qualified staff are well versed in the appraisal of all property types including land (commercial, residential, farms, ranches, etc.), retail, industrial, office, and multifamily. We are also experienced in the valuations of subdivisions, self-storage facilities, and special purpose assets such as schools or churches.

CBRE valuation team members have access to all of the latest technology and software. Our analysts/appraisers utilize Argus Enterprise (AE), Argus Asset Management, Flood Insights, NDC Data, RealFacts, Costar, ESRI, Real Capital Analytics, Hoovers, Hanley Wood Market Intelligence, LoopNet, RealQuest, RealData Apartment Insights, all major Multiple Listing Services and Marshall Valuation Service. Our appraisers also have access to robust in-house research and GIS departments which provides our team members with the most current real estate information available.

CBRE also uses the most current file sharing software. This allows us to receive and transmit large electronic files such as title work, CAD drawings, plats, images, as well as provide seamless and efficient electronic delivery of our appraisal reports to clients.

Our project approach is simple – “get it right the first time”. We accomplish this by following an efficient framework and step-by-step protocol from project kickoff to completion. The protocol includes a detailed process from the initial file set up, property inspection, research, analysis, valuation, and report delivery.

Quality & Risk Management (QRM) are critical to the completion of an accurate, supportable, and defensible appraisal. Our QRM control protocol includes an internal peer review completed by an appraiser who holds the MAI designation right-of-way scrub review.

CBRE has a proven track record providing right-of-way appraisal and appraisal review services for various right-of-way projects across the country. We are well qualified and have the expertise necessary to complete valuation and advisory services for the City.

Project Approach & Methodology

CBRE's has a successful record of completing valuations and advisory services on a variety of projects involving acquisitions of real property including residential and commercial property for roadways, oil & natural gas pipelines, electric transmission lines, drainage improvements, waterlines, sewer lines, utilities, voluntary buyouts, and other infrastructure projects.

Our qualifications demonstrate our experience and ability to comply with all federal, state, county, and local requirements. Our diversified client base speaks to our past performance relative to the quality of our services as well as the timely delivery of our valuation and advisory services.

Demonstrated Understanding Of The Scope Of The Project

CBRE VAS provides appraisal services based on the scope of work and deliverable required to meet the needs of the intended user and intended use of the appraisal. This includes whether the appraisals will be used for acquisitions, dispositions, development, construction, or matters involving condemnation/eminent domain.

Appraisal Procedures

A general overview of the typical appraisal procedures is provided below. Please note that this process will be modified as needed based on the specific scope of work, appraisal requirements, intended use, and intended users.

- Identify subject property
- Determine function of appraisal
- Procure data based on property type
- Gather and verify data
- Inspect site or comparable property
- Select and apply valuation method
- Reconcile value indicators for final opinion of value

A summary of the typical valuation process is provided below. Please note that this process will be modified as needed based on the specific scope of work, appraisal requirements, intended use, and intended users.

- Step 1 – Identification of the problem
- Step 2 – Scope of work determination
- Step 3 – Data collection and property description
- Step 4 – Data analysis
- Step 5 – Land value opinion
- Step 6 – Application of the approaches to value
- Step 7 – Reconciliation of the value indications and final opinion of value
- Step 8 – Report of defined value

Appraisal Process

Our process, once authorized, typically will follow this general framework. Please note that once engaged, we will consult with the client to customize an appraisal process to meet the needs of the contract.

A brief overview of the appraisal process is provided below.

- Initial file research
- Mail letter to owner
- Subject property research
- Comparable and market research
- Property inspection
- Report writing
- Quality assurance and control
- Delivery

Appraisal Review Procedures

A brief overview of the Appraisal Review process is provided below.

- Initial review of Appraisal
- Analysis of data and methods utilized
- Contact Appraiser with questions, clarifications, or revisions, if appropriate
- Property inspection if part of the Review Scope.
- Review Appraisal report drafting and completion
- Conclusions regarding concurrence or otherwise
- Quality assurance and control

Appraisal Review Process

An appraisal review is the act or process of developing and communicating an opinion about the quality of another appraiser's work (USPAP). The essence of appraisal review is to investigate, analyze, and verify the logic, methodology and procedures used in appraisals and to ensure the preparation of competent and thorough reports that result in sound, well-supported value opinions. The purpose of a review is to reinforce the client's confidence in the credibility of the appraisal conclusions it presents. An overview of the appraisal review process is presented below.

The review process has seven steps.

- Step 1 – identification of the problem
- Step 2 – Scope of work determination including identification of assumptions, if necessary
- Step 3 – Research and Analysis

- Step 4 – Develop Opinions and Conclusions
- Step 5 – Develop Opinions and Conclusions - Reasons for any disagreements
- Step 6 – Inspection - is not always included in an assignment
- Step 7 – Development, preparation, and transmittal of the reviewer's report to the Client

Typically, the review is used to reinforce the client's confidence in the credibility of the appraisal conclusions. Our experience will ensure the project team develops a deliverable that is research based, analytical, impartial, and meets all requirements.

CBRE VAS requires all appraisal reports to be reviewed by MAI-designated Management. Managers include all employees with titles of Managing Director (MD), Senior Managing Director (SMD), Executive Managing Directors (EMD) and sometimes Director.

For every assignment, the Reviewer is required to complete a thorough review of the items in the report as outlined in the VAS Practice Area Guidelines (PAG) and as endorsed by the Appraisal Institute. This review and approval are mandatory.

Together, our project team possess over 60 years of valuation and Right of Way experience. In addition, we have access to one of the largest teams of full-service Real Estate professionals available to provide any guidance necessary.

PROFESSIONAL STAFF

CBRE, Inc. is pleased to present our assembled team with a proven track record to perform appraisal services, including specialists from CBRE's full range of in-house resources. We "field the best team." The ability to integrate any required service from our own in-house resources is a substantial advantage that sets CBRE apart from other real estate firms. The team for this assignment will be led by Genesee Borges. Ms. Borges primary project team will be comprised of Steve Parent, Principal Appraiser and Reviewer, and Nick Anderson, a Portland-based Senior Appraiser. We also have numerous other qualified team members that can be assigned to projects depending on the scope and timeframe of the projects.

CBRE Appraisal Team	
Appraisal Team	Role/Responsibility
Genesee Borges Vice President	Project Manager
Steve Parent, MAI, SR/WA, R/W-AC, PMP, SRA, AI-GRS, AI-RRS Senior Vice President	Principal Appraiser
Nick Anderson, MAI Vice President	Senior Appraiser

Project Manager

Genesee Borges currently serves as a Vice President in the Valuation & Advisory Services division in the Intermountain Northwest and Pacific Northwest region. Ms. Borges has provided valuation and right of way advisory services in Oregon and Southwest Washington since 2004.

Having commenced her right of way career with Right of Way Associations, Inc. (ROWA) in 2004, Ms. Borges contributed to and coordinated various projects involving acquisition, relocation, property management, and appraisal coordination. In addition to her role as a Project Coordinator and Relocation Specialist for acquisition projects, her work with ROWA involved providing Administrative Offer Summaries, Administrative Determinations of Just Compensation, Project Funding Estimates, alignment cost studies, and coordinating the services of subconsultant appraisers. Projects included the Columbia River Deepening Project, Portland's Eastside CSO, Oregon Transportation Investment Act III (OTIA III) bridge rehabilitation projects, and Affordable Housing projects throughout the Portland metropolitan area.

Ms. Borges' then pivoted toward pursuing the Certified General Appraiser license in 2015 which led her to Donnerberg Enterprises, LLC. Here, she specialized in right of way appraisal work involving full and partial acquisitions acquired under the threat of eminent domain and litigation support. Projects included Outer Powell Safety Phase I and Phase II Project (ODOT), TriMet's Division Transit Project, and the Newberg-Dundee Bypass Project (ODOT).

Prior to joining CBRE's Right of Way Valuation & Advisory team, she was a member of the Infrastructure Practice Group with Cushman & Wakefield. Projects included the B2H (Bonneville to Hemingway) High-Voltage Transmission Line

Project with Idaho Power Company, corridor valuations for BNSF (e.g., trackage rights, advisory services for acquisitions by DOT projects), valuation advisory services to the Port of Portland, wind farm valuation & advisory services for SAGE Development Authority, and valuation services for Caltrans, Arkansas Department of Transportation, and Georgia Department of Transportation.

Ms. Borges graduated from Portland State University with a Bachelor of Science, with undergraduate studies focused on Mathematics and Statistics. Subsequent to completing all qualifying coursework and experience for the appraisal licensing through the Appraisal Institute, she then pursued the Master of Real Estate (MSRE) from the Portland State University's School of Business. As of the date of this writing, she is now scheduled to sit for the Comprehensive Exam for the Certified General Appraiser license.

Principal Appraiser

Steve Parent, MAI, SR/WA, R/W-AC, PMP, SRA, AI-GRS, AI-RRS is a Senior Vice President of the Valuation & Advisory Services in the Mountain Northwest and Pacific Southwest region. Steve will serve as Principal Appraiser and Reviewer for this contract. Steve has managed right of way and appraisal contracts for New Mexico Department of Transportation (NMDOT), Washington State Department of Transportation (WSDOT), Idaho Department of Transportation (IDOT), Oregon Department of Transportation (ODOT), California High Speed Rail, Riverside County Transportation Commission, Southern California Gas, and Southern California Edison, to name a few.

His appraisal experience involves right-of-way valuation projects, partial acquisitions including fee, permanent, and temporary easements, and property types including retail, office, industrial, multi-family residential, single family residential, mixed-use, and agricultural.

In the last ten years, Steve has managed and appraised more than 2,000 properties affected by public projects including: transportation, heavy / light / high-speed rail, gas transmission, electric transmission, water transmission, and flood protection. He also has extensive appraisal review experience having completed more than one hundred appraisal reviews, been declared as an expert witness in multiple jurisdictions, been deposed, and testified at trial.

Benefiting from being part of a \$20 billion (annual revenue) company, CBRE Valuation's industry leading technology platform and access to proprietary data provides the foundation for us to provide more capacity than Placer County would ever need.

We provide ROW valuation solutions using local appraisers then if additional capacity is needed, we draw upon regional and even national resources if necessary. This provides virtually limitless capacity. One recent project in the West involved multiple counties in multiple states and team CBRE delivered appraisals covering 300 properties in just five weeks. CBRE has the capacity to serve Placer County, solving for all your valuation needs.

Senior Appraiser

Nick Anderson, MAI is a Vice President with CBRE Valuation & Advisory Services in Portland, Oregon. Mr. Anderson is a designated member of the Appraisal Institute (MAI) and is licensed as a Certified General Real Estate Appraiser in the States of Oregon and Washington. He specializes in performing appraisal and consultation services for investment, mortgage lending, trust, estate tax, feasibility studies and right-of-way assignments. Located in the Portland office since 2018, Nick has experience providing valuation services in a wide range of property types in Oregon and SW Washington, including the valuation of subdivisions, development land, industrial, office, retail, self-storage, manufactured home communities/RV parks, mixed-use properties, agricultural land and rock quarry/sand and gravel pit properties. Nick also has experience providing right-of-way valuation services, including partial acquisitions including fee, permanent, and temporary easements.

Valuation Analyst/Research Assistant

Valuation Analyst/Research Assistant will provide support data for the Senior Appraisers and to the Appraiser of Record. Valuation Analysts will be involved in the actual preparation of the appraisal report and in any valuation analysis.

Support/Administrative Staff

The support/administrative staff will be responsible for coordinating initial subject data into physical and electronic files, provide contract support and process invoices.

Collaboration will characterize the Project Team's performance and will ensure efficiency and success in achieving the City's objectives. Each staff member will carry out specific roles and responsibilities, which were determined through an analysis of every step required to fulfill the required services. Professional Staff resumes can be found following the Conclusion of this response.

Project Experience

CBRE is extremely familiar with the state of Oregon and has completed over 4,500 assignments within the State over the last 36 months. These assignments involved a variety of commercial properties including, multifamily, single and multitenant office, single and multitenant industrial, single and multitenant retail, subdivisions, unimproved land, convenience stores, self-storage facilities, automotive dealerships, special purpose properties, etc.

CBRE's extensive experience combined with our depth and breadth of staffing differentiates our firm from others in the market. CBRE's Oregon ROW Valuation team consists of 3+ appraisers that specialize in various property types with numerous team members with experience in condemnation/ eminent domain-related projects. Our team members are qualified and routinely provide litigation support and expert witness testimony if needed.

CBRE's clients include numerous public entity clients including many state, county, and local municipalities. CBRE has a proven track record for completing appraisals for public entity clients across the state of Oregon and has high performance results.

- Port of Portland – Project Manager, Genesee Borges, led a team for a project with the Port of Portland Oregon. The project included appraisals for decision-making and asset valuation for the risk management division.
- Oregon Department of Transportation/HDR Engineering – Americans with Disabilities Act Ramp Project – Partial acquisition appraisal services for 50+ properties by Steve Parent and Nick Anderson. Typical rights appraised included fee, permanent and temporary easements.
- Oregon Department of Transportation/HDR Engineering – Outer Powell Transportation Safety Project (Outer Powell) – Steve Parent assembled and led the appraisal team of employees, including Genesee Borges and Nick Anderson along with subconsultants for Outer Powell, a roadway transportation project along Highway 26 in the City of Portland. Partial acquisitions included permanent and temporary easements. CBRE delivered more than 80+ appraisals.
- Idaho Transportation Department – ITD Project 21923 – US 26, JCT Hitt Rd (25th E), Bonneville Co. – 18 appraisals were completed in just 6 weeks. Rights appraised included permanent and temporary easements. Some valuations measured severance damages.
- Alaska Department of Transportation – KTN: South Tongass Hwy: Saxman to Surf St. Pavement Rehabilitation & South Tongass Hwy: Deermount to Saxman Widening (South Tongass Highway Project) – Appraisal scope included approximately 140 parcels with approximately 100 deliverables. Rights appraised included permanent and temporary easements.

Additional examples of our project experience can be provided upon request

COST OF FEE

Fee is a function of scope and complexity. CBRE typically bids appraisal and appraisal reviews on a lump sum basis and bids are property specific. The more complex the appraisal assignment, typically, the more complex the review assignment. Typical fees are provided in the table below.

Our fee schedule for a typical Taking & Damages appraisal falls between the range of \$4,000 and \$10,000, depending on complexity. Generally, a 10% to 20% discount may apply for multi-property requests where there is synergy among property types and locations. Typical fees for appraisal reviews fall between the range of \$1,000 and \$2,500, again depending on the complexity of the appraisal assignment.

CBRE is prepared and qualified to provide Waiver Valuations, Project Funding Estimates / Program Cost Estimates, and Project Sale Books upon request with fees dependent on the scope of the project.

2024 Billing Rates	
Senior Vice President	\$250/hr.
Vice President	\$200/hr.
Senior Associate	\$175/hr.
Associate	\$150/hr.
Senior Valuation Analyst	\$125/hr.
Valuation Analyst	\$100/hr.
Administrative Support	\$85/hr.

2024 Expert Witness / Litigation Billing Rates	
Senior Vice President	\$450/hr.
Vice President	\$350/hr.
Senior Associate	\$300/hr.
Associate	\$250/hr.
Senior Valuation Analyst	\$200/hr.
Valuation Analyst	\$150/hr.
Administrative Support	\$125/hr.

CONCLUSION

CBRE has a proven track record of providing valuation and advisory services for state, regional, and local governmental entities including counties, cities and other municipalities. CBRE has the knowledge and expertise to provide appraisal services and expert witness testimony.

Linking our knowledge from thousands of projects with highly coordinated research, appraisal, reporting and project management, we deliver quality, cost-effective right of way appraisals in a timely and consistent fashion.

Any questions or clarifications regarding our response can be directed to the following team member:

Genesee Borges,
Vice President
CBRE Valuation & Advisory Services
T: (503) 449-4913
E: genesee.borges@cbre.com

CBRE appreciates the opportunity to provide a response to this Request for Proposals (RFP).



VALUATION AND ADVISORY SERVICES

Genesee Borges

Vice President, Oregon

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E genesee.borges@cbre.com

Clients Served

- Port of Portland
- City of Portland
- ODOT, GDOT, ArDOT
- Idaho Power Company
- BNSF
- SAGE Development Authority
- Epic Land Solutions

Pro Affiliations / Accreditations

- Vice Chair, International Valuation Committee, IRWA
- Co-Chair, REEL (Real Estate Emerging Leaders, Portland State University)
- Journal Fellow, Real Estate Quarterly, Portland State University
- Education Chair, Beaver State Chapter 3, International Right of Way Association (IRWA)
- IRWA, Chapter 3 Professional of the Year (2023)
- Candidate for SR/WA Designation, International Right of Way Association

Education

- Bachelor degree, Portland State University
- Masters in Real Estate from Portland State University

Professional Experience

Genesee Borges has provided valuation and right of way advisory services in Oregon and Southwest Washington since 2004. She currently serves as Vice President in the CBRE Valuation and Advisory Services division.

Having commenced her right of way career with Right of Way Associations, Inc. (ROWA) in 2004, Ms. Borges contributed to and coordinated various projects involving acquisition, relocation, property management, and appraisal coordination. Her work with ROWA included providing Administrative Offer Summaries, Administrative Determinations of Just Compensation, Project Funding Estimates, and alignment cost studies. Projects included the Columbia River Deepening Project, Portland's Eastside CSO, Oregon Transportation Investment Act III (OTIA III) bridge rehabilitation projects, and Affordable Housing projects throughout the Portland metropolitan area.

Ms. Borges' then pivoted toward pursuing the Certified General Appraiser license which led her to Donnerberg Enterprises, LLC in 2015. Here, she specialized in infrastructure appraisal work, focusing on valuations for full and partial acquisitions acquired under the threat of eminent domain and litigation support. Major projects included Outer Powell Safety Phase I and Phase II Project (ODOT), TriMet's Division Transit Project, and the Newberg-Dundee Bypass Project (ODOT).

Ms. Borges graduated from Portland State University with a Bachelor of Science, with undergraduate studies focused on Mathematics and Statistics. Subsequent to completing all qualifying coursework and experience for the appraisal licensing through the Appraisal Institute, she then pursued the dual Master of Real Estate from the Portland State University's School of Business.

Awards

- Recipient of the 2017 Greater Oregon Chapter Education Scholarship, Appraisal Institute
- "Professional of the Year" award (2023), Chapter 3, International Right of Way Association
- Guest Speaker (Real Property Valuation), Graduate School of Business, Portland State University
- Recipient of the 2023 Chapter of the Year Award, International Right of Way Association

Senior Vice President, Western Region



M +1 916.919.7262
steve.parent@cbre.com

Role

As CBRE's leader of Right of Way for the Western Region, Steve is responsible for business development, pursuit management, recruiting, team building, technical leadership, quality assurance, and delivery. He is actively growing the business line within thirteen states through collaboration with local leadership in service to our clients by leveraging CBRE's industry-leading people, data and technology.

Experience

Steve has a broad-based background including engineering, program management, project management, business development, strategic planning, commercial brokerage, real estate investment, and property management. Steve has managed right of way and/or appraisal contracts for California High Speed Rail, Ben Franklin Transit, City of Bend, Oregon DOT, Washington DOT, Idaho DOT, New Mexico DOT, Utah DOT, Caltrans, the San Diego Association of Governments (SANDAG), City of Idaho Falls, San Diego Gas & Electric, North County Transit District, Southern California Gas, Southern California Edison, City of Santa Ana, City of Los Angeles, the Los Angeles Department of Water and Power, Riverside County Transportation Commission, and Sacramento Municipal Utilities District, to name a few. His appraisal experience involves right-of-way valuation projects, partial acquisitions including fee, permanent, and temporary easements, and property types including retail, office, industrial, multi-family residential, single family residential, mixed-use, agricultural, railroad corridor, telecommunications, renewable energy, UASFLA (Yellow Book). In the last ten years, Steve has managed and appraised more than 2,000 properties affected by public projects including: transportation, heavy / light / high-speed rail, gas transmission, electric transmission, water transmission, flood protection, telecom, and renewables. He also has extensive appraisal review experience having completed more than one hundred appraisal reviews, been declared as an expert witness, been deposed, and testified at trial. Steve is an active speaker on topics related to ROW appraisal, acquisition, and land valuation.

Years of Experience:

- Project Management: 30
- Appraisal: 20

Education / Licenses / Designations

- MBA, University of Cincinnati, Operations Management & Finance, 1999
- BS, University of Cincinnati, Mechanical Engineering, 1992
- Certified General Real Estate Appraiser: CA, AZ, NV, HI, CO, OR, WA, MT, WY, NM, UT, ID, AK, TX
- CA Real Estate Broker License #01433367
- MAI, SRA, AI-GRS, AI-RRS Designations, Appraisal Institute
- Senior Right of Way Agent (SR/WA), International Right of Way Association (IRWA)
- Right of Way Appraisal Certification (R/W-AC), IRWA
- Project Management Professional (PMP), Project Management Institute (PMI)

Project Experience

Steve has worked on hundreds of public infrastructure projects in multiple states involving thousands of properties pertaining right of way valuation. Specific project experience and client / project references are available upon request.

Nick Anderson, MAI, R/W-AC

Vice President, Portland OR

CBRE



T + 1 503.946.4941
Nick.anderson2@cbre.com

1300 SW Fifth Avenue
Suite 3500
Portland, OR 97201

Experience

Nick Anderson is a Vice President with CBRE Valuation & Advisory Services in Portland, Oregon. Mr. Anderson is a designated member of the Appraisal Institute (MAI) and is licensed as a Certified General Real Estate Appraiser in the States of Oregon and Washington. He specializes in performing appraisal and consultation services for investment, mortgage lending, trust, estate tax, feasibility studies and right-of-way assignments.

Located in the Portland office since 2018, Nick has experience providing valuation services in a wide range of property types in Oregon and SW Washington, including the valuation of subdivisions, development land, industrial, office, retail, self-storage, manufactured home communities/RV parks, mixed-use properties, agricultural land and rock quarry/sand and gravel pit properties. Nick also has experience providing right-of-way valuation services, including partial acquisitions including fee, permanent, and temporary easements.

Prior to pursuing a career as a real estate appraiser, Nick served on active duty in the United States Marine Corps.

Professional Affiliations / Accreditations

- Designation Member of the Appraisal Institute
- IRWA Member of Chapter 3
 - Right of Way Appraisal Certification (R/W-AC)
- Certified General Appraiser in the following states:
 - Oregon License No: C001242
 - Washington License No: 1102430

Education

- University of Oregon, Eugene, Oregon
 - Cum Laude, B.S. Economics, B.S. Statistics
- Appraisal Institute Courses:
 - Advanced Income Approach
 - Advanced Market Analysis and Highest & Best Use
 - Advanced Concepts and Case Studies
 - Quantitative Analysis
 - Qualifying Education for Certification
 - Contract or Effective Rent – Finding the Real Rent
 - Commercial Appraisal Review
 - Expert Witness for Commercial Appraisals
 - Subdivision Valuation
- International Right of Way Association (IRWA) Courses:
 - Easement Valuation, Course 403
 - The Valuation of Partial Acquisitions, Course 421
 - Problems in the Valuation of Partial Acquisitions, Course 431

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

**STEPHEN M PARENT
CBRE**

1300 SW 5TH AVE, #3500

PORTLAND, OR 97201

License No.: C001396
Issue Date: August 01, 2023
Expiration Date: July 31, 2025



Chad Koch, Administrator

Appraiser Certification and Licensure Board

State Certified General Appraiser

28 hours of continuing education required

**NICHOLAS J ANDERSON
CBRE**

1300 SW FIFTH AVE, STE 3500

PORTLAND, OR 97201

License No.: C001242
Issue Date: July 01, 2024
Expiration Date: June 30, 2026


Chad Koch, Administrator

CBRE VALUATION & ADVISORY SERVICES

Prepared By:

Genesee Borges

Vice President

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PORTLAND VALUATION GROUP

Real Estate Appraisal & Commercial Economic
Analysis Professional Services

Request for Proposals (RFP) EcDev2024.3

Urban Renewal Agency of Oregon City
625 Center Street
Oregon City, OR 97045

David E. Balfour, MAI
Portland Valuation Group, Inc.
24925 SW Garden Acres Road
Sherwood, OR 97140
Dave@oregonvalue.com
503-330-8697

PORTLAND VALUATION GROUP

Portland Valuation Group, Inc.

Request for Proposals (RFP) EcDev2024.3

Urban Renewal Agency of Oregon City
c/o James Graham, Economic Development Department
625 Center Street
Oregon City, OR 97045

June 27, 2024

Dear Mr. Graham:

In response to your Real Estate Appraisal & Commercial Economic Analysis Professional Services, I have completed a Request for Proposal (RFP) for my firm, Portland Valuation Group, Inc. It should be noted that our firm will utilize the DBA of The Valuation Group.

As discussed herein, I am a Designated Member of the Appraisal Institute, and my appraisal practice includes a wide range of public and private property assignments. I am a qualified expert witness and have testified in court on multiple occasions to my appraisal assignments. I am a past President of International Right-of-Way Association (IRWA) Chapter 3. It should be noted that our firm is experienced in a variety of development land tract valuation types which requires substantive due diligence and understanding of development hurdles in order to form accurate valuation opinions.

- Relative to the RFP, it is relevant to know that our firm has completed similar assignments for the Beaverton Urban Renewal Agency (URA), Sherwood URA, Wilsonville URA, Tigard URA, City of Eugene Downtown Riverfront, Happy Valley URA, and Hillsboro URA. For these clients, our firm has completed over 100 appraisals. Additionally, our firm frequently works with developer and engineers relative to real estate values and financial feasibility for proposed redevelopment projects of mixed-use lands, subdivision lands, commercial lands, and industrial lands.

My firm includes myself (owner/MAI appraiser), a second Certified General Appraiser (MAI Appraiser), three project & research coordinators, an administrative assistant, and two Registered Appraiser Assistants.

We have responded to each section of the proposal content identified in the Qualifications of Proposer. It should be noted that only David E. Balfour, MAI is authorized to sign any contract and that this proposal does not include any redactions.

Should you have any questions, please do not hesitate to contact us.



David E. Balfour, MAI
President, Portland Valuation Group, Inc.
Address: 24925 SW Garden Acres Road,
Sherwood, OR 97140
Email Address: dave@oregonvalue.com
Phone: 503-330-8697

PORTLAND VALUATION GROUP

Portland Valuation Group, Inc.

Request for Proposals (RFP) EcDev2024.3

Certifications:



PORTLAND VALUATION GROUP

Portland Valuation Group, Inc.

Request for Proposals (RFP) EcDev2024.3

History and Description of the Proposer:

Portland Valuation Group, Inc. provides real property appraisal and appraisal review services. Mr. Balfour, Owner/President of the firm, has been practicing for 12 years. Our appraisal staff includes two Certified General Appraisers with MAI designations, three project & research coordinators, and two Registered Appraiser Assistants.

As of the date of the RFP, our firm has the experience of over 2,000 appraisals. Our mission statement is to lead the appraisal industry in Oregon by providing fair and unbiased appraisals, prompt and courteous client service, and superior quality of work. This requires attention to detail, constant monitoring of market data, and maintaining delivery dates that our client's project schedule requires. The firm's activity level and location in multiple Oregon submarkets allows for consistently updating our research database and reducing project delivery schedules based upon data collection and familiarity with the submarkets throughout the region.

Identification of Professional Staff Members:

Portland Valuation Group, Inc key personnel consist of seven appraisal staff members. The following tabulation provides a quick summary of key personnel titles and their responsibilities:

Key Personnel Member	Title	Description of Duties	Experience
David Balfour, MAI	Principal Member/Sr. Appraiser	Manages client relationships, manages, and views all projects, writes and reviews ann appraisal work produced.	12 years
Sam Karpeles, MAI	Senior Appraiser	Manages and views all projects, assists in writing and reviewing all appraisal work produced.	8 years
Zack Jacobs	Registered Appraiser Assistant	Assists in writing and reviewing all work produced, as well as project organization.	3 years
Phil Mills	Registered Appraiser Assistant	Assists in writing and reviewing all work produced, as well as project organization.	1 year
Erin Burns	Project & Research Coordinator	Assists the appraisers with project organization, coordination, and research.	4 years
Maria Friesen	Project & Research Coordinator	Assists the appraisers with project organization, coordination, and research.	2 years
Nikki Smith	Project & Research Coordinator	Assists the appraisers with project organization, coordination, and research.	1 year
Jessica Balfour	Administrator	Manages company documentation and daily operations.	6 years

Together, the team members maintain agreed schedules and budgets. Any of the previous client references herein can attest to the timely and prompt completion of Portland Valuation Group's appraisal assignments.

Furthermore, clients can attest to the experience of Mr. Balfour and Mr. Karpeles working with multiple consultant types throughout appraisal assignments with experience hiring and managing civil engineers, geotechnical professionals, mineral resource professionals, construction contractors, land use planners, real estate brokers, property specialists (fuel stations, golf courses, car wash facilities, etc.), landscape contractors, and more.

Together, the employees of the firm work together to solve appraisal problem assignments, be dependable for our clients, converse and relate to property owners involved in appraisal assignments, and respect all who we interact with throughout the appraisal process.

PORTLAND VALUATION GROUP

Portland Valuation Group, Inc.

Request for Proposals (RFP) EcDev2024.3

- It is critical for consultants in our line of work to understand that property owners are experiencing a wide range of property impacts and therefore emotions in the circumstances of partial acquisition. Our team approaches every meeting/interaction with compassion, patience, and understanding. While partial acquisition assignments are an everyday occurrence for us and the public agency involved, the acquisition could be a once in a lifetime situation/experience for the private property owner impacted and the sensitive nature of these situations must be recognized by right-of-way consultants. Every property owner interaction during a project has a cause-and-effect impact for the next member of a project team during a project's timeline.

The following tabulation provides a summary of key certifications and accreditations that company staff holds:

Person	David E. Balfour, MAI	Sam A. Karpeles, MAI
Position	Owner/MAI Appraiser	MAI Appraiser
Credentials	State of Oregon Certified General Appraiser State of Washington Certified General Appraiser Member of the Appraisal Institute (MAI) ODOT Approved Appraiser (& Review Appraiser) WSDOT Approved Appraiser WSDOT Approved Review Appraiser ITD Approved Appraiser (& Review Appraiser) Approved Uniform Standards of Federal Land Acquisition Appraiser Past President/Member of IRWA Member of ASFMRA Candidate for Appraisal Institute AI-GRS Designation Recipient of 2024 Portland Business Journal 40 Under 40 Award	State of Oregon Certified General Appraiser State of Washington Certified General Appraiser Appraisal Institute Affiliated Member Appraisal Institute Candidate for Designation ODOT Approved Appraiser (& Review Appraiser) WSDOT Approved Appraiser
	Zack Jacobs	Phil Mills
Position	Registered Appraiser Assistant	Registered Appraiser Assistant
Credentials	Oregon ACLB Appraiser Trainee Appraisal Institute Affiliated Member Appraisal Institute Candidate for Designation	Appraisal Institute Affiliated Member Appraisal Institute Candidate for Designation

It should be noted that resumes for each firm member have been included in the addenda.

Cost of Fee:

To provide a market value estimate for 1799 Washington Street (22E29 01402), which is zoned MUD; Mixed Use Downtown, the appraisal firm budgets a not to exceed amount of **\$5,950.00**.

This budget includes review of property boundaries, easements, encumbrances, planning department interviews relative to allowable uses and development capacity, access, adjacent land uses, environmental assessment data, geo-technical data, market data, and more.

Appendix



DAVID E. BALFOUR, MAI
Portland Valuation Group Inc.
Real Estate Valuation Services
Dave@OregonValue.com
503-330-8697



David E. Balfour, MAI is a Certified General Appraiser and owner of Portland Valuation Group Inc. Since 2012 Mr. Balfour has focused his appraisal practice primarily upon public acquisition and eminent domain work. Mr. Balfour is a licensed appraiser in both Oregon and Washington while being experienced as an expert witness. Mr. Balfour has gained competence in a variety of appraisal assignments such as public acquisitions, eminent domain, federal land acquisitions (Yellow Book), estate planning, litigation support and testimony across multiple property types.

PROFESSIONAL DESIGNATIONS & CREDENTIALS

State of Oregon

Certified General Real Estate Appraiser (Cert. No. C001256)
Oregon Department of Transportation (ODOT) Qualified Appraiser
Oregon Real Estate Broker Pre-License Training

State of Washington

Certified General Real Estate Appraiser (Cert. No. 1102402)
Washington Department of Transportation (WSDOT) Qualified Appraiser and Review Appraiser

State of Idaho

Certified General Real Estate Appraiser (Cert. No. 5612)
Idaho Department of Transportation (ITD) Qualified Appraiser and Review Appraiser

MEMBERSHIPS AND AFFILIATIONS

Member of The Appraisal Institute
International Right of Way Association
American Public Works Association
American Society of Farm Managers & Rural Appraisers
Portland Business Journal 40 Under 40



EDUCATION

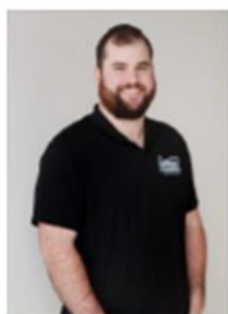
Linfield College – McMinnville, Oregon – *Bachelor of Science in Finance* – 2012

PROFESSIONAL SERVICES

Appraisal & Appraisal Review
Market Research/Development Land Site Analysis
Expert Witness Testimony/Litigation Support (condemnation & private party)

PROFESSIONAL CONTRIBUTIONS

Greater Oregon Chapter of the Appraisal Institute: Outstanding Candidate Award – 2016
IRWA Chapter 3 Professional of the Year Award - 2019
IRWA Chapter 3 President – 2021-2022
Seminar Group – 2019 & 2021 Faculty for the Oregon Eminent Domain Seminar



SAM A. KARPELES, MAI
Portland Valuation Group Inc.
Real Estate Valuation Services

Sam@oregonvalue.com
971-235-6263

PORTLAND VALUATION
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Sam A. Karpeles is a Certified General Appraiser and employee of Portland Valuation Group, Inc. Since April 2017 Mr. Karpeles has gained experience in a variety of assignments such as charitable remainders, estate planning, public acquisitions, federal land acquisitions (Yellow Book), shopping centers, office, retail, and industrial buildings, vacant land, special purpose properties, single-family residences, multifamily properties, and residential subdivisions. Mr. Karpeles is a licensed appraiser in both Oregon and Washington.

PROFESSIONAL CREDENTIALS

State of Oregon

Certified General Real Estate Appraiser (License No.: C001420)

State of Washington

Certified General Real Estate Appraiser (Cert. No. 20107006)

Washington Department of Transportation (WSDOT) Qualified Appraiser

MEMBERSHIPS AND AFFILIATIONS

Member of The Appraisal Institute
International Right of Way Association
American Society of Farm Managers & Rural Appraisers



EDUCATION

Oregon State University – Corvallis, Oregon (2008-2013)

- Bachelor of Science
- Naval Reserve Officer Training Corps Scholarship Recipient

PROFESSIONAL SERVICES

Appraisal & Appraisal Review
Market Research/Development Land Site Analysis
Condemnation Valuation/Offer Evaluation
Uniform Appraisal Standards for Federal Land Acquisitions (“Yellow Book”)

PROFESSIONAL CONTRIBUTIONS

IRWA Chapter 3 Vice President – 2023 to Present

**ZACK JACOBS**

Portland Valuation Group Inc.

Real Estate Valuation Services

Zack@OregonValue.com

971-998-0499



Zack Jacobs is an employee of Portland Valuation Group Inc. He earned an B.A. in Sociology at Linfield University in 2020. During his time at Linfield, Zack was a collegiate football player. For a year and a half after completing his degree, Zack worked at MacLaren Juvenile Correctional Facility in the Campus Operations unit where he assisted in controlling the movements and operations within the facility, as well as providing security and support when needed.

Zack supports the firm with his research and statistical background from his B.A. and is currently pursuing a certification as a Certified General Appraiser.

EDUCATION

Linfield University – McMinnville (2016-2020)

- Bachelor of Arts Degree in Sociology

PROFESSIONAL SERVICES

- Property Research
- Data Collection
- Informational Interviews
- Appraisal Report Writing

**PHILLIP MILLS**

Portland Valuation Group Inc.
Real Estate Valuation Services

Phil@OregonValue.com
951-772-5232

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Phillip Mills is an employee of Portland Valuation Group Inc. He earned an B.A. in Communication at Boise State University in 2021. During his time at Boise State, Phil was a collegiate football player. For two-years after completing his degree, Phil worked at Interior Logic Group's Portland branch where he acted in the role of Account Executive, focusing on outside sales, project management, estimating, and production oversight for single-family new construction across the state of Oregon and into Southern Washington.

Phil provides research and data analysis support for appraisal projects as part of the appraiser trainee process and is currently pursuing a certification as a Certified General Appraiser.

EDUCATION

Boise State University – Boise, ID (2018-2021)

- Bachelor of Arts Degree in Communication
- Minor Business Administration

PROFESSIONAL SERVICES

- Property Research
- Data Collection
- Informational Interviews
- Appraisal Report Writing

**ERIN M. BURNS**

Portland Valuation Group Inc.
Real Estate Valuation Services

Erin@OregonValue.com
503-477-4148



Erin Burns is an employee of Portland Valuation Group Inc. She earned an M.S. in Education from Portland State University in 2013. Prior to working at Portland Valuation Group, she worked for Kaiser Permanente as a Coding Consultant. In this role, she was responsible for providing expert consultation to medical clinicians regarding documentation and coding. Mrs. Burns was a Subject Matter Expert and Lead for the New Hire Training Team where she managed other qualified professionals to facilitate training to all incoming clinicians. She gained experience and a thorough understanding of government rules and regulations and areas of potential risk for fraud and abuse in regard to coding.

Erin Burns supports the firm in the role of Project and Research Coordinator. Mrs. Burns has transitioned her skill sets into assisting the firm by managing multiple appraisal projects, coordinating, and maintaining delivery schedules and project deadlines, providing timely communication with clients and property owners, and by providing expert assistance on any issue.

EDUCATION**University of Oregon – Eugene, Oregon (2008-2012)**

- Bachelor of Science in Educational Foundations
- Minor in Anthropology
- Dean's List

Portland State University – Portland, Oregon (2012-2013)

- Teaching License, Master of Education

PROFESSIONAL EXPERIENCE

- Coding Consultant – Kaiser Permanente (2016-2021)
- Account Coordinator – Shasta Administrative Services (2014-2016)
- Claims Technical Assistant – Gallagher Bassett (2013-2014)



MARIA ANN R. FRIESEN
Portland Valuation Group Inc.
Real Estate Valuation Services
Maria@OregonValue.com
503-477-4148



Maria Friesen is an employee of Portland Valuation Group Inc. For the last five years, she worked for Banner Bank as a BSA/AML Quality Assurance Analyst and BSA KYC Analyst. In these roles, she was a Subject Matter Expert on high-risk business customers and coordinated Quality Assurance reviews following the Bank's BSA/AML QA program on all tasks conducted within the BSA/AML team. She gained experience and a thorough understanding of government rules and regulations and areas of potential risk for money laundering in regard to retail banking.

Maria Friesen supports the firm in the role of Project and Research Coordinator. Mrs. Friesen has transitioned her skill sets into assisting the firm by managing multiple appraisal projects, coordinating, and maintaining delivery schedules and project deadlines, providing timely communication with clients and property owners, and by providing expert assistance on any issue.

EDUCATION

South Kitsap High School – Port Orchard, WA (2002-2005)

- High School Diploma

PROFESSIONAL EXPERIENCE

- BSA/AML Quality Assurance Analyst – Banner Bank (2017-2022)
- Enhanced Due Diligence Analyst – Umpqua Bank (2015-2017)
- Assistant Branch Manager – Chase Bank (2007-2014)

**NIKKI SMITH**

Portland Valuation Group Inc.
Real Estate Valuation Services

Nikki@OregonValue.com
503-477-4148

PORTLAND VALUATION
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Nikki Smith is an employee of Portland Valuation Group Inc. For the last five years, she worked for Fly Fishing Collaborative as the Administrative Assistant and Operations Coordinator. In these roles she led all administrative tasks and projects, assisting the staff and Board of Directors with communications, project timelines and the planning and execution of the organizations' events. She became proficient in the field of nonprofit work both locally and globally and increased her skillset in aquaponics construction.

Nikki Smith supports the firm in the role of Project and Research Coordinator. Mrs. Smith has transitioned her skill sets into assisting the firm by managing multiple appraisal projects, coordinating, and maintaining delivery schedules and project deadlines, providing timely communication with clients and property owners, and by providing expert assistance on any issue.

EDUCATION

Sherwood High School – Sherwood, OR (2004-2007)

- High School Diploma

Portland Community College – Portland, OR (2006-2009)

- Associates of Science

Pacific University – Forest Grove, OR (2009-2012)

- Bachelor of Social Work

PROFESSIONAL EXPERIENCE

- Administrative Assistant & Operations Coordinator – Fly Fishing Collaborative (2018-2023)
- Instructional Assistant – Sherwood School District (2017-2018)
- Department Head – A Jesus Church (2012-2016)



JESSICA BALFOUR
Portland Valuation Group Inc.
Real Estate Valuation Services
Office@OregonValue.com
503-781-1010



Jessica Balfour is an employee and the majority owner of Portland Valuation Group Inc. She earned her Bachelor of Science degree in Nursing from George Fox University in 2013. Prior to working at Portland Valuation Group, she worked in a few hospitals including Salem Hospital, Pacific Northwest Transplant Bank, and Providence St. Vincent as a Registered Nurse and an Organ Procurement Specialist. In these roles, she was responsible for taking care of patients in several units including Cardiac ICU, Neuro ICU, and general ICU as well as working with families to coordinate the transport of organs with organ donor patients/recipients. Mrs. Balfour is also currently a licensed Oregon Real Estate Broker with Equity Oregon Real Estate.

Jessica Balfour supports the firm in the role of Business Owner and Bookkeeper/Office Administration. Mrs. Balfour has transitioned her skill sets into assisting the firm by managing accounts payable, accounts receivable, invoicing, and other miscellaneous office administrative tasks.

EDUCATION

George Fox University – Port Orchard, WA (2009-2013)

- Bachelor of Science in Nursing

PROFESSIONAL EXPERIENCE

- Registered Nurse – Salem Hospital (2013-2017)
- Organ Procurement Specialist – Pacific Northwest Transplant Bank (2017-2018)
- Registered Nurse – Providence St. Vincent Hospital (2018-2021)
- Licensed Oregon Real Estate Broker – Equity Oregon Real Estate (2020-Current)



CITY OF OREGON CITY

URBAN RENEWAL COMMISSION - REVISED

DRAFT MINUTES

Commission Chambers, Libke Public Safety Facility, 1234 Linn Ave, Oregon City
Wednesday, June 05, 2024 at 6:00 PM

CALL TO ORDER

Chair Mitchell called the meeting to order at 6:01 P.M.

ROLL CALL

PRESENT: 7 - Commissioner Laurie Ariniello, Commissioner Adam Marl, Commissioner Doug Neeley, Commissioner Frank O'Donnell, Commissioner Rocky Smith, Chair Mike Mitchell. Commissioner Denyse McGriff

STAFFERS: 5 - City Manager Tony Konkol, Assistant City Manager Alexandra Rains, City Recorder Jakob Wiley, Economic Development Manager James Graham, City Attorney Bill Kabeiseman

CITIZEN COMMENTS

There were no citizen comments.

DISCUSSION ITEM

3. Stimson Property – Appraiser RFP

James Graham, Economic Development Manager, invited the Commissioners to review a Draft Request for Proposals (RFP) for engaging an appraiser for the Stimson Urban Renewal Property. Mr. Graham observed that though the RFP draft states that seven months to one year will be allowed for completion of the project, he did not expect the appraisal to take that much time. He suggested allowing five months for the appraisal with an option for the appraiser to request more time if needed.

Commissioner O'Donnell asked whether the Geotechnical Analysis had to be completed before this appraisal could be undertaken. Mr. Graham reported that the results of the Geotechnical Analysis were expected by June 7, 2024, and added that the Environmental Assessment was already complete. Tony Konkol, City Manager, added that with an approved RFP draft, City Staff should have what they need to move forward on this project and report developments by the Urban Renewal meetings in July.

Commissioner McGriff arrived at approximately 6:06 P.M.

Commissioner Ariniello asked how the current existence of a landscaping company on the Stimson property affects the appraisal process. Mr. Konkol replied that the current lease agreement expires at the end of this year, and that the business owner has expressed an intention to relocate.

Commissioner Ariniello asked whether this process would result in two reports: one regarding the feasibility of a hotel on the site, one describing the appraisal. Mr. Graham replied in the affirmative.

Commissioner O'Donnell asked whether the Geotech report would be encompassed in the appraisal, and Mr. Konkol replied that it would. Commissioner O'Donnell suggested that it would be valuable for the appraisal to discuss the highest and best use of the property.

Commissioner McGriff suggested that the highest and best use suggested in an appraisal does not always consider all factors in a decision. She expressed a preference for the appraisal to suggest multiple possible uses of the property. Mr. Konkol suggested that the appraisal would consider the specific purpose of a hotel and supporting mixed use development on the property, because the Commission had expressed interest in that scenario, but that the appraisal could also explore other potential uses for the property.

Motion made by Commissioner McGriff, Seconded by Commissioner Ariniello, to accept the Draft Request for Proposals as submitted.

The motion passed by the following vote:

Yea – 7: Commissioner McGriff, Commissioner Marl, Vice Chair Neeley, Commissioner O'Donnell, Commissioner Smith, Chair Mitchell, Commissioner Ariniello

COMMUNICATIONS

Mr. Konkol invited Bill Kabeiseman, City Attorney, to provide an update on the Williams v. Urban Renewal Commission litigation. This litigation concerns the ability to use tax increment funding when no outstanding debt exists. Mr. Kabeiseman reported that approximately one year ago, former Mayor Williams and Mrs. Williams filed a suit against the Urban Renewal Commission, desiring it to cease operating. Mr. Kabeiseman reported that since that time, the main activity in the case had been discovery. Mr. Kabeiseman reported that the attorney for Mrs. Williams had recently offered to withdraw the suit with the stipulation that if it is dismissed, the Urban Renewal Commission waive costs. Mr. Kabeiseman observed that pursuing the recovery of the legal costs would cost more than the value of the costs themselves, which amounted to around \$300.00 to \$400.00.

There was consensus to stipulate to waive the costs if the case is withdrawn.

Mr. Konkol reported that after the Stimson property appraisal is underway, his next goal was to discuss advertising the property for sale. Commissioner McGriff observed that there had been discussion in the past about creating a Request for Qualifications in connection with advertising this property. She suggested starting to craft a Request for Qualifications or Request for Proposals while the appraisal is underway. Mr. Konkol agreed.

Commissioner O'Donnell observed that the results of the Geotech survey and appraisal might offer several options for the property and suggested waiting to see these results before making firm plans. Commissioner McGriff agreed but suggested starting work on a general template would be useful.

ADJOURNMENT

Chair Mitchell adjourned the meeting at 6:17 P.M.

Respectfully submitted,

Jakob Wiley, City Recorder