Project Team Overview

O'Brien & Company, MAKERS, Cascadia Region Green Building Council (Cascadia), have joined to provide the City of Ellensburg with a full-service consultant team offering extensive experience in sustainability strategy development, code review and writing, planning, green building program development, commercial and residential energy efficiency, green building rating systems, low impact and transit-oriented development, as well as public involvement and Technical Review Committee (TRC) facilitation. Our team brings a unique and comprehensive skill set to efficiently and effectively respond to all requirements detailed in the RFQ. We commend the City of Ellensburg for embarking on this progressive Energy Efficiency & Conservation (EE&C) Strategy project, and linking it to a code review to ensure alignment with the goals outlined in the City's Comprehensive Plan.

When undertaking a project of this type, the City and community may identify the need for additional technical expertise during the strategy development process. Although our team covers the expertise requested in the RFQ, we have identified two needs that should be addressed and may require additional technical capacity: (1) transportation infrastructure and (2) natural resource analysis and delineation. To address this extra capacity, we have requested the Transpo Group (Transpo) and The Watershed Company to be available on an as-needed basis for technical assistance. Firm and staff bios for both firms are included in our Statement of Qualifications. If at any time during the project the need for additional expertise is identified (such as an energy model analyst, green infrastructure or LID specialist, green appraisal expert, or economist), we will work with the City and tap our extensive industry network to provide additional team support. All our team members are small firms with experience working in central Washington, and are committed to the project's success. You will set a national example with this Strategy, and we look forward to working with your project team to develop an innovative, creative and workable strategy, backed with code and policy that promote, encourage, and facilitate energy-efficient land use.

Firm Profiles

O'Brien & Company

O'Brien & Company is a nationally recognized leader in sustainability strategy development, research, green building design and construction, and education. We discern, translate, and facilitate the complex choices of incorporating sustainable principles into buildings, operations and communities. Our staff includes LEED Accredited Professionals (LEED APs), Certified Sustainable Building Advisors (CSBAs), Energy Star raters, as well as competent writers, facilitators, and educators. Our consulting services focus on City sustainability strategies, policies, planning, and programs; green building consulting (including LEED, Built Green®, Living Building Challenge, and Passive House); as well as several training courses as part of the Sustainable Development Training Institute. A large body of our work includes green building rating system development, sustainability strategy development, and development of technical field guides and training curricula. We also provide residential home performance testing, verification, and energy modeling services. We focus on achieving sustainability on a practical level.

MAKERS

MAKERS Architecture, Planning, and Urban Design (MAKERS) has been a groundbreaker in crafting user-friendly, workable, and successful zoning/development standards for over twenty years. John Owen, Senior Partner, wrote some of the first design guidelines within the State. His graphics and concepts have been replicated all across the country. Bob Bengford, in his thirteen years at MAKERS, has specialized in zoning/design guidelines, managing and completing over thirty projects addressing a wide range of physical and political settings. Crafting high-quality zoning/development standards that are user-friendly, workable, and help achieve community design goals is at the core of MAKER's services.

Cascadia Region Green Building Council

The Cascadia Region Green Building Council (Cascadia) is one of three original chapters of the U.S. Green Building Council. The organization's mission is to promote the design, construction and operation of buildings in Alaska, British Columbia, Washington and Oregon that are environmentally responsible, profitable and healthy places to live, work and learn. Cascadia is creating a roadmap for sustainable building. To understand the breadth of hurdles that exist for projects, Cascadia engages in code research to identify barriers and works collaboratively with regulatory agencies to find solutions and incentives to promote higher levels of sustainability.

Highlights of Our Team: Why Us?

Award-winning Sustainability Strategy and Innovative Regulatory Code Work

Our team provides award-winning talent in sustainability strategy development and practical implementation of sustainability action plans, green building programs, code and policy development and reviews, and public involvement - it's what we do best. MAKERS has been awarded planning awards for fifteen of its projects involving code updates and regulatory measures. Cascadia is at the forefront of establishing innovative practices to review codes for barriers to green building and energy efficiency. O'Brien & Company is the lead consultant on King County's Green Building ToolKit for suburban cities, which addresses innovative regulatory requirements, incentives, and programs to encourage energy conservation, low impact development, and green building. The firm's Sustainability Strategy for the City of Shoreline received a Washington State APA award and recent recognition at the City's Council meeting.

Deep Technical Foundation for Energy Efficient Design and Construction

MAKERS' architects understand the importance and know how to effectively apply energy savings measures in urban development projects. O'Brien & Company's roots are in the energy arena: its first two Washington-based projects were developing a Technical Reference and Builders Field Guide for the state's new Residential Energy Code (1991). Today, the firm provides in-depth technical guidance on meeting ENERGY STAR, LEED and Living Building Challenge energy provisions (including pre-design energy modeling), and conducts performance testing and verification for dozens of projects. Cascadia's Living Building Challenge addresses energy conservation, renewable, and small scale on-site energy generation, as well as conservation strategies and technologies. EE&C is at the core of both the LEED and Living Building Challenge rating systems.

Familiarity with Central and Eastern Washington Communities and Issues

O'Brien & Company developed two eastern Washington Built Green® programs including Tri-Cities and Inland Northwest which addressed local environmental, industry, economic, and social conditions, and involved regional stakeholders and green building experts. We completed numerous green building and operations and maintenance (O&M) trainings and workshops in Spokane, Pullman, Cheney, Pasco, and Walla Walla, and are currently working on several LEED for Homes projects in eastern Washington. We also created Spokane's first chapter on C&D for its solid waste management plan update. MAKERS worked on planning projects in Wenatchee, Spokane, Prosser, Pasco, Kennewick, Chelan, Cle Elum, and Yakima. Cascadia operates state-wide membership, outreach, and events for LEED and the Living Building Challenge (LBC).

Creative Community-Based Planning

Both O'Brien & Company and MAKERS have conducted complex community-based planning projects that involve both innovative and controversial issues. We pride ourselves in making community participation educational and fun. We think of civic participation as a resource, and as one of the first steps in effective City strategy development. We identify key stakeholders and involve them in a productive process with short feedback loops and frequently establish, engage, and facilitate technical advisory groups.

Comprehensive Planning, Code Updates and Regulatory Analysis

MAKERS' core competency includes assisting municipalities in comprehensive planning and code updates. The firm's site development talent provides a better understanding of the practical implications of land use code measures to craft code provisions that make sense for property owners and municipalities. Cascadia has been on the forefront conducting regulatory research that includes a comprehensive code review to remove barriers to green building and the Living Building Challenge. Their work is a national model for code reviews and updates that advance green building and energy efficiency. O'Brien & Company compiled permitting and other regulatory barriers to implementing Built Green Communities and the King County LID Ordinance in a complicated, multi-jurisdictional HUD VI project.

Strategic Approach and Leadership

Our proposed project approach is preliminary, but all activity elements should be clear. We see value in a fully integrated approach that garners robust community support, leverages the City's resources without overburdening them, provides key technical expertise where needed, and builds City capacity and tools for ongoing work and addressing changes necessitated by growth. Our goal is to assist the City in developing a leading EE&C strategy for the 21st century, and we can help get you there.

Team Organization

Our team members have clearly defined roles for this project. O'Brien & Company is responsible for Activity 1 and MAKERS will lead Activity 2. Cascadia will provide technical guidance for the code review and update, as well as oversight and training for both activities. Transpo Group offers as-needed technical assistance in issues related to transportation infrastructure. The Watershed Company provides support for natural resource and critical habitat analysis and conservation. All firms may have a role in the public involvement and education aspects of this project. The Team's Organizational Chart is shown in Appendix B.

At a minimum, O'Brien & Company's responsibility for Activity 1 includes:

- Project management and overall EE&C strategy development
- Research of physical and demographic data, and existing codes and policies
- Community workshops planning, facilitation, and reporting
- Development of local agency/non-profit/ utility/industry partnerships
- Establishing baseline EE&C indicators and metrics
- Developing the Strategy implementation plan
- Developing new policy to help implement the strategy
- Compiling the final EE&C Strategy
- Developing a structure for strategy progress reporting and effectiveness tracking

MAKERS will lead all tasks for Activity 2 to include:

- Review and research of existing codes and policies
- Assistance on neighborhood physical and demographic data (local knowledge)
- Writing new code language
- Education to City staff and the community on identified barriers and solutions to encourage EE&C options in City development and operations

Cascadia Green Building Council will provide:

- Oversight and guidance in Activity 1
- Analysis of barriers to EE&C, green building, and low impact development (LID) in existing codes
- Compiling code update recommendations for City, community, and Council review
- Community workshop and training assistance

As technical expert support, Transpo Group and The Watershed Company will assist the project team with as-needed code review and planning services related to:

- Transportation planning and land use
- Natural habitat and critical area protection planning and conservation

Staff Bios

O'Brien & Company

Kathleen O'Brien, Principal in Charge

Kathleen O'Brien is a nationally recognized leader in the field of sustainability, having been in the field as a writer, educator, strategic planner, and project consultant for nearly 25 years. Kathleen has developed sustainability strategies, plans and frameworks for organizations, municipalities and corporations. Examples include: a strategy to reduce the environmental impact of the King County Housing Authority's operations; a strategic plan for developing a Sustainable Energy Demonstration Lab at the Brightwater Wastewater Facility; a city-wide sustainability strategy for the City of Shoreline; and an economic sustainability study for the City of Kirkland. Kathleen has also facilitated a fast-tracked process with the Sustainable Design Task Force of the National Council of Architectural Review Boards to directly link sustainable architecture to health, safety, and welfare—and to identify ways to model that in the organization's laws, architectural registration exam, and internships. Kathleen is a prolific writer and has published dozens of articles and publications on a variety of sustainable building topics. Her new book, *The Northwest Green Home Primer* (Timberpress) is her first full-length publication aimed at the layperson.

Yvonne Kraus, Project Manager for Activity 1 and EE&C Strategy and Implementation Lead

Yvonne has ten years of experience in green building and sustainability consulting, public involvement, community outreach, and facilitation. She is a certified facilitator and charrette planner, and focuses on development and implementation of sustainability strategies, green building programs, community and corporate sustainability initiatives, and LEED EB: O&M. Over the past two years, Yvonne delivered four new Built Green Programs to Washington State and California. In August 2009, she launched the new Washington Green Schools Program, as Project Manager of a 5-member consultant team. Her current projects focus on plans, policies, and practices that apply to existing buildings, and cities. She assisted in the development of the City of Shoreline's Sustainability Strategy and is currently managing development of the City of Sammamish Sustainability Strategy. Yvonne excels at project management for projects that have short delivery timelines and include multiple team members and public involvement.

Nora Daley-Peng, Public Outreach and Stakeholder Facilitation Lead

Community-based planning and design has been at the core of Nora's career. She brings more than a decade of experience in landscape architecture and planning projects to her current work at O'Brien & Company. Nora helped North Seattle Community College incorporate sustainable building as a central tenet in the new campus master plan; contributed insights to the advisory committee based on her experience as a project manager for multi-block LEED project in South Lake Union; guided the Silverdale Community Campus through the LID process; and was appointed by City of Seattle to serve on the LEED for Neighborhood Development (LEED-ND) South Lake Union Advisory Committee to provide review of and recommendations to the South Lake Union's pilot submittal for LEED-ND. In her previous position, Nora was the urban designer for many transit-oriented development plans, waterfront redevelopment plans and community-based planning projects. An exceptional example of a community-building project was the Squire Park Traffic Calming/ Pedestrian Safety Improvement Project in Seattle. Nora led a process to capture community-generated ideas on how to make Squire Park's neighborhood streets greener, calmer, friendlier, and safer and folded the results into a Community Action Plan.

Alistair Jackson, Energy Efficiency Expert

Alistair brings more than 14 years of hands-on experience in the field of sustainability. He leads O'Brien & Company's residential services team, contributes significant experience of organizational sustainability to the company's policy and program work, and provides strategic and business management leadership. Alistair applies his knowledge and understanding of sustainable design and green building science to provide technical consulting services, diagnostic analysis, performance testing and green building certification for residential projects. He is an experienced trainer, presenter, and facilitator. Alistair is currently working with King County to develop a set of implementable and quantifiable development strategies for developers to adopt that will meet proposed County SEPA requirement to mitigate at least 15% of the carbon emissions attributable to new developments. He also consults to the City of Seattle on their Environmentally Preferred Purchasing (EPP) Plan.

Elly Bunzendahl, Education and Training Lead

Elly's science and engineering background provides her with a holistic and technical approach to building science, conservation programs, and sustainable development advocacy. She has provided technical assistance, Rate energy modeling (REM) results, performance testing, and project management on numerous Northwest Energy Star and LEED for Homes residential projects. Elly has contributed LEED project assistance and charrette facilitation for multiple commercial projects, and is experienced in translating that technical information into clear and engaging educational products. She co-developed a six-month Sustainable Homes Professional Curriculum and served as project lead for the development of a 30-minute DVD for Built Green Washington highlighting the programmatic elements and checklist information.

Brooke Best, Project Assistant and Historic Preservation Specialist

Brooke's background combines the disciplines of historic preservation and sustainability. She has over ten years of professional experience in project management, research and writing. She spent five years as a preservation consultant before shifting careers into the commercial interiors sector with a focus on sustainability. Brooke is passionate about bringing these two areas together – conserving our existing building stock with sustainability in mind. At O'Brien & Company, she assists on a variety of projects related to programs, planning & policies and green building consulting. Brooke holds a BS in Environmental Studies and a MS in Historic Preservation.

MAKERS

Bob Bengford, Project Manager for Activity 2 and Regulatory Review and Update Lead

Bob has completed more than thirty regulatory/design guideline projects in his thirteen years at MAKERS. He's an expert in preparing development regulations and has won a number of awards, including Everett's Downtown Plan and Core Residential Development Standards, Burien's Downtown Handbook, and Wenatchee's Riverfront Plan, for which zoning changes and design standards were a key implementation component. Bob's code review experience includes downtown form-based code for Chelan; design guidelines for Prosser; Yakima neighborhood design guidelines; and guidelines for Fancher Heights in Douglas County. Bob has a solid understanding of the economics of development, and he understands that development regulations and design guidelines must find the right balance of control and flexibility to encourage desirable development in given market conditions. Bob's enthusiasm, reliability, and communication skills have made him a tremendous project manager and a positive influence on each of his projects. Together with John Owen, Bob developed interactive participation techniques to creatively involve citizens and stakeholders in planning processes, including fast-paced charrettes; visual preference exercises to identify community identity preferences; modeling and "sand box" activities to explore three-dimensional alternative concepts; evaluation sessions to analytically identify the pros and cons of design concepts; and "principled negotiation" urban design techniques to resolve potential conflicts.

John Owen, Land Use and Form-Based Code Specialist

John Owen has managed code updates and design guidelines for numerous communities. He's led several award-winning design guidelines and plans with zoning and code updates, notably the Downtown Kirkland Design Guidelines, the Rucker/Grand Avenue (Everett) Zoning Overlay and Design Standards, the Mill Creek Downtown Plan, Design Guidelines for the University Community (Seattle) Rezone, and the Snohomish County Residential Development Guidebook. Several of his guidelines projects—for towns such as Yelm, Kingston, Kirkland, Kent, Black Diamond, Woodinville, and Redmond—involved formulating a tool that assisted redevelopment, historic district preservation, and renewing the town's design identity. John Owen has presented papers and led conference sessions on design guidelines, and recently taught a University of Washington Continuing Education course on the subject. John has extensive experience in downtown revitalization and neighborhood planning, and he understands the role of development code provisions in these efforts. Besides his technical expertise, John has gained an excellent reputation for providing personalized professional service.

Dara O'Byrne, Code Specialist

Dara has worked on sustainability issues for over 10 years. During her graduate studies, Dara worked on a green development strategy for South Lake Union in a planning studio that included recommendations for adopting requirements for a green area factor, which the City eventually adopted. For Seattle's South Lake Union Neighborhood Plan, Dara helped craft the sustainability goals and policies that were adopted into the City's Comprehensive Plan. At MAKERS, Dara led an internal "Green MAKERS" discussion group to facilitate

the sharing of innovative ideas within the firm and drafted "Urban Design Guidelines to Promote Ecological Objectives" for use as an internal document. She managed the Kennewick US 395 corridor plan and played a major role on the Snohomish County Sustainable Agriculture Project. She worked closely with community groups to develop the Walkable Crown Hill Streetscape Improvement and Traffic Calming Toolkit. Dara currently works on downtown revitalization plans for the City of Woodinville and the City of Renton.

Cascadia Chapter of the US Green Building Council

Katie Spataro, Green Building and Energy Efficiency Code and Policy Specialist

Katie has over a decade of experience working in the building industry as a construction project manager, program manager and green building consultant to support her role at the Cascadia Region Green Building Council where she provides research on code and regulatory barriers to green building. Engaging public agencies and project teams alike, Katie works to address obstacles and identify solutions to achieve more sustainable development practices. While at King County, Katie helped develop the first green building and sustainable development section for the County's 2004 Comprehensive Plan update. Over the last few years, Katie has been working closely in the realm of land use and building codes, facilitating local government efforts to remove barriers and create meaningful incentives in support of high-performance projects. She recently completed project management and research to the City of Vancouver and Clark County for an extensive analysis of the code and regulatory barriers to sustainable, affordable residential development.

Transpo Group

Andy Mortensen, Transportation Planner

Andy has 24 years of experience in transportation planning, traffic engineering, travel demand forecasting and public involvement. Andy is Transpo's Director of Non-motorized Planning and his expertise includes pedestrian planning, specifically on local plans to address ADA-related federal policies. Andy has extensive experience in the development of transportation plan policies that include comprehensive land use plan policies and development standards that implement enhanced bicycle and pedestrian use and circulation; street design, functional classification, and traffic calming standards to facilitate better use of alternative modes; and, access management, land development and traffic management polices and ordinances to improve multi-modal safety and operations. His experience in policy planning for pedestrian plans includes transition plans to meet requirements of ADA, particularly Title II. His work comprises developing transition plans that document self-examination inventories and plans and policies that focus on removing barriers to pedestrian accessibility. In Idaho, Andy managed the development of a Pedestrian and Bicycle Transition Plan for the Ada County Highway District (ACHD). For ACHD, Andy managed the Transportation-Land Use Integration Plan for the county's urban and rural areas. This plan includes new policies for context sensitive solutions with emphasis on pedestrian access and safety, redefining street standards and LOS policies to better guide land and street project development.

The Watershed Company

Amy Summe, Environmental Planner

With twelve years of professional experience, Amy has thorough knowledge of Washington's environmental regulations. She brings extensive experience in Endangered Species Act consultations and Shoreline Master Program updates. Her education and background as a biologist complement her work as an environmental planner. Coupled with wetland and shoreline expertise, Amy helps cities and counties set policies that bring them into compliance with state mandates and smooth permitting so that work meets the highest standards. Amy has been co-project manager for over 200 BE/BAs addressing pier and bulkhead modifications, shoreline restoration and modification, stream restoration and culvert replacement, and roads and wetland fill projects in Eastern and Western Washington.

City of Ellensburg

Energy Efficiency & Conservation Strategy and Land Development Code Update

Kickoff Meeting

July 21, 2010

O'brien & company

MAKERS
architecture · planning · urban design

CASCADIA
REGION GREEN BUILDING COUNCIL

transpoGROUP

THE WATERSHED COMPANY

Today's Purpose

- Provide an understanding of the two projects and how they relate
- Present roles and expectations of all involved
- Review opportunities and potential approaches for each of the projects
- Identify City's goals and a sense of the desired approach to deliverables for each of the projects

Project Background

STEP 1: Staff sought external sources to help fund the update

- Energy Efficiency and Conservation Strategy Block Grant - Stimulus Funds
  - to develop an Energy Efficiency and Conservation Strategy for the City including
    - ✓ *identify and address current Code deficiencies/obstacles relating to energy efficiency/conservation many of which relate to Land Development Code*

STEP 2: Contracted with consultant team

- inter-relationships between the two projects = economies of effort
- utilize one consulting team for both projects separately but simultaneously
- RFQ issued and contracts executed for both projects

STEP 3: Initiate the two projects with today's KICKOFF meeting.

City of Ellensburg WASHINGTON

Project(s) Outcomes

- Broad Spectrum Energy Efficiency & Conservation Strategy
- Updated, User-Friendly City Codes Consistent with Comp Plan & Energy Conservation Strategy