

RESOLUTION No. 36112

Approve the Design Development Phase work program for the OHSU/North Macadam Aerial Tram, including the proposed approach for an international design competition. (Resolution)

WHEREAS, On July 10, 2002, City Council passed Resolution 36085, which accepted the Portland Office of Transportation's Marquam Hill to North Macadam Connector Study and endorsed the recommendations contained therein; and

WHEREAS, the City Council is committed to seeing that the highest level of design and innovation is explored as the OHSU/North Macadam Aerial Tram project proceeds; and

WHEREAS, Resolution 36085 acknowledged the role of Portland Aerial Transportation, Inc, as the project sponsor for the OHSU/North Macadam Aerial Tram; and

WHEREAS, Portland Aerial Transportation, Inc., in its organizational goals, has set out to design a tram that "will meet the highest standards of architecture and urban design;" and

WHEREAS, Resolution 36085 directed the Portland Office of Transportation to work with Portland Aerial Transportation, Inc., on the development of a design competition approach for the OHSU/North Macadam Aerial Tram; and

WHEREAS, on May 23, 2002, City Council passed Resolution 36071 approving the City Engineer's recommended process for considering a Suspended Cable Transportation System linking Marquam Hill to North Macadam; and

WHEREAS, the Portland Office of Transportation, in collaboration with Portland Aerial Transportation, Inc., has produced a draft of the proposed work program for the Design Development phase of the City Engineer's process for considering a Suspended Cable Transportation System; and

WHEREAS, the proposed Design Development work program includes an international design competition for the OHSU/North Macadam Aerial Tram developed by Portland Aerial Transportation, Inc.; and

WHEREAS, City Council desires additional information on the second tram linking OHSU to Barbur Boulevard, including potential alignment alternatives that would minimize impacts to property and the Terwilliger Parkway; and

WHEREAS, the proposed design competition provides an opportunity for additional ideas to be solicited and generated for the second tram; and

WHEREAS, City Council desires additional information on the potential mitigation and neighborhood improvements that could accompany the OHSU/North Macadam Aerial Tram project; and

WHEREAS, City Council has received a request for funding participation in the OHSU/North Macadam Aerial Tram Design Competition from Portland Aerial Transportation, Inc. in the amount of \$150,000.

NOW, THEREFORE, BE IT RESOLVED, that the City Council approves the City Engineer's Process for the Design Development phase, as shown in Exhibit A; and

BE IT FURTHER RESOLVED, that the City Council directs the Portland Office of Transportation and Portland Aerial Transportation, Inc. to collaborate with interested citizens on the design of the OHSU/North Macadam Aerial Tram in a meaningful public process throughout the Design Development phase; and

BE IT FURTHER RESOLVED, that while City Council makes no affirmative decision regarding the second tram linking Marquam Hill to Barbur Blvd., City Council directs that the design competition examine potential options for the inclusion of a second tram in the design proposals; and

BE IT FURTHER RESOLVED, that the City Council directs the Portland Office of Transportation and Portland Aerial Transportation, Inc., to work with the Design and Historic Landmarks Commissions to solicit their advice and feedback throughout the design process; and

BE IT FURTHER RESOLVED, that the City Council directs the Portland Office of Transportation and Portland Aerial Transportation, Inc., to return with a briefing for the City Council after a winning design team is selected; and

BE IT FURTHER RESOLVED, that the City Council will commit \$150,000 to the Design Competition for the OHSU/North Macadam Aerial Tram; and

BE IT FURTHER RESOLVED, that the City Council directs the Portland Office of Transportation to return with an ordinance describing the City's funding sources and a contract with Portland Aerial Transportation, Inc. by December 18th, 2002; and

BE IT FURTHER RESOLVED, that the Design Development phase be completed by October 1, 2003, at which point City Council will approve, reject, or modify a design recommendation for the OHSU/North Macadam Aerial Tram from the City Engineer.

Adopted by the Council, NOV 13 2002

Mayor Vera Katz
 Commissioner Jim Francesconi
 Matt Brown:slg
 November 4, 2002
 Resolution 103002.doc

GARY BLACKMER
 Auditor City of Portland

BY

Susan Sanson
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EXHIBIT A**Marquam Hill/North Macadam Aerial Tram****Design Development Phase
Work Plan**

November 13, 2002

Background

On May 23, 2002, City Council passed Resolution 36085, which accepted and endorsed a process (Figure 1) for considering a suspended cable transportation system (SCTS). The process contained five discreet phases: Process Development, Project Assessment, Policy/Regulation Evaluation and Development, Design Development, and Engineering and Construction. The Process Development phase culminated in the Council's approval of the overall SCTS process on May 23. On July 10, 2002, the next two phases reached their conclusion with the adoption of the Marquam Hill Plan and Council's acceptance of the Marquam Hill to North Macadam Connector Study.

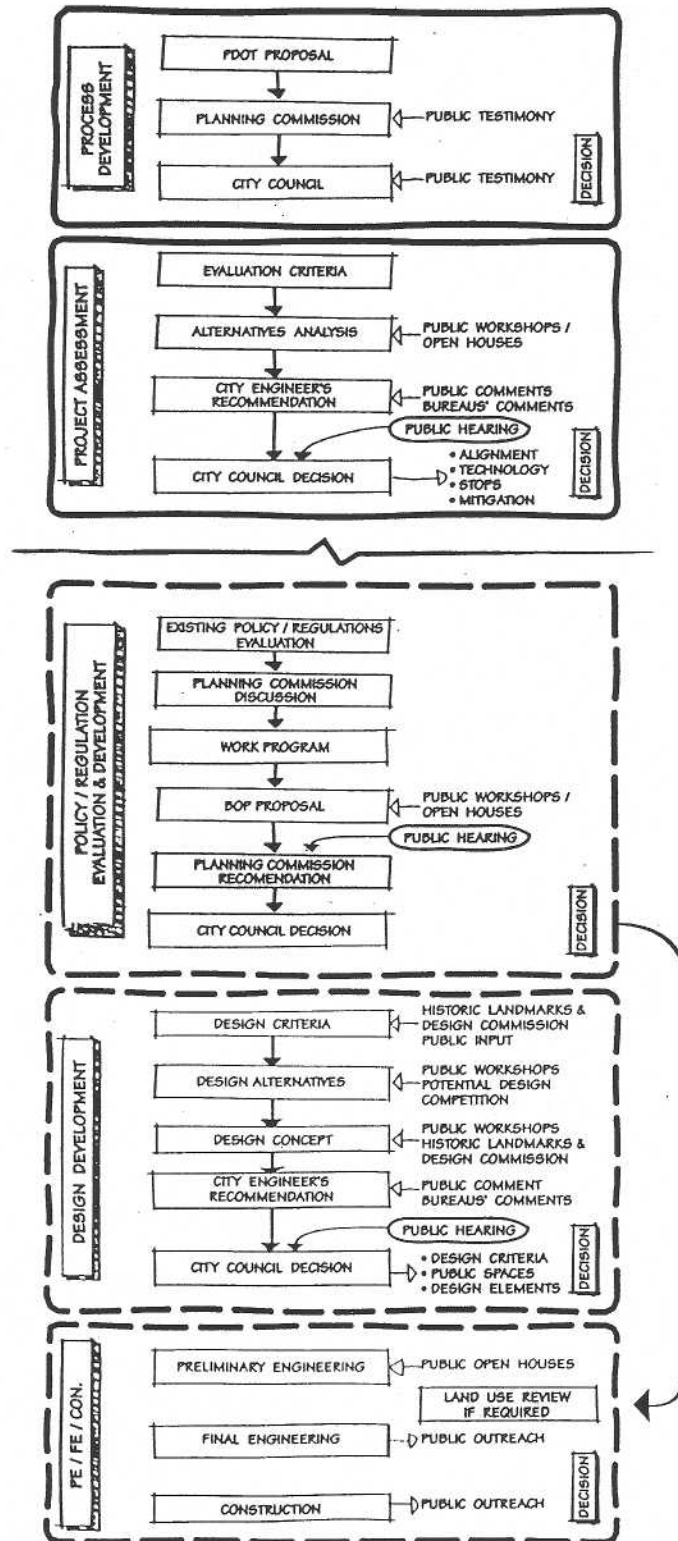
The connector study, issued by the Portland Office of Transportation, recommended that a two tram system be constructed. The first tram would be aligned on Gibbs Street, connecting OHSU to North Macadam. The second tram would connect Marquam Hill to Barbur Boulevard, with the lower landing just north of the Gibbs Street Tram on property currently occupied by the Congregation Ahavath Achim, a Sephardic Jewish congregation.

As part of its action accepting PDOT's recommendation on the tram, City Council directed PDOT to undertake a number of items in order to move the tram proposal forward through the Design Development phase. Specifically, PDOT was directed to:

- Collaborate with Portland Aerial Transportation, Inc. (PATI), a non-profit board that has assumed the role of project advocate and sponsor.
- Evaluate the impacts of the second tram, especially with regard to impacts on Terwilliger Parkway and Congregation Ahavath Achim.
- Work with PATI on the development of a design competition that would be part of the design development phase.
- Work with the community in identifying potential mitigation measures for the tram project.
- Resolve ownership, operating, and funding issues.

A design competition has been chosen as the initial vehicle for considering design alternatives for the OHSU/North Macadam Aerial Tram. The competition process will entail a number of elements, including the identification and selection of design competitors, public events surrounding the competition, and the competition itself. The design competition process for the OHSU/North Macadam Aerial Tram has been designed to result in the selection of a design team for the tram, and will provide an opportunity for Portland to "test drive" the design teams prior to selecting the team that will work on this important and highly visible project.

Figure 1 – Process for Considering a Suspended Cable Transportation System



The work plan described here outlines a process for resolving the design issues surrounding the tram proposal. Ownership, operations, and funding are being addressed through a separate process led by PDC and involving PDOT, the Office of Management and Finance, the Bureau of Planning, OHSU, and other relevant parties. Over the course of the design development process, key decisions will be made affecting the timing, budget, operations and ownership issues for this new form of transportation in Portland. It will be critical to involving the parties mentioned above, and others, in making these decisions.

Design Development Phase – Work Plan

1.0 Process Development

PDOT will develop a process for contemplating design issues associated with the tram. The centerpiece of this process will be a design competition for the tram systems. The competition will be developed and used primarily to select the best design team for the project, but it will also provide an opportunity for creative ideas to surface and for community discussion to occur. The process will be presented to City Council for acceptance and direction.

2.0 Public Process

A meaningful public process will be a key component of the design development phase. In order provide opportunities for collaboration between project team members, the design team, and the public, a number of different elements are included.

Because of the Design Competition, the public process will be much different at the outset of this phase of work. Design competitions are established to maximize design creativity and innovation by leading design professionals. While competitions, in general, do not lend themselves to community participation in the design process, there are opportunities for the public to be involved in the competition, as outlined below. Also, the winning team will be judged partially on their approach to public involvement during the Schematic Design phase.

While the design team will be proposing a more detailed public process as part of the design competition, there are some minimum expectations, described below, that will be expected of the winning team when it comes time to implement those ideas.

2.1 Communication

A cornerstone of the public involvement process is good communication with the public in order to ensure that interested citizens are given adequate opportunities and information to participate. This means that a variety of methods should be used, including direct mail, newsletters, project websites, press releases, and others.

2.2 Public events

A number of public events will be needed to support the design effort. As noted earlier, the design competition is likely to have less opportunity for public interaction, while the schematic design phase will fully engage the public in the design process. Some of the methods that should be used include:

- *Exhibitions* – During the competition, exhibitions of the competitors' previous work will be displayed for public viewing and provide opportunities for the public to become familiar with the firms' design capabilities and track record.

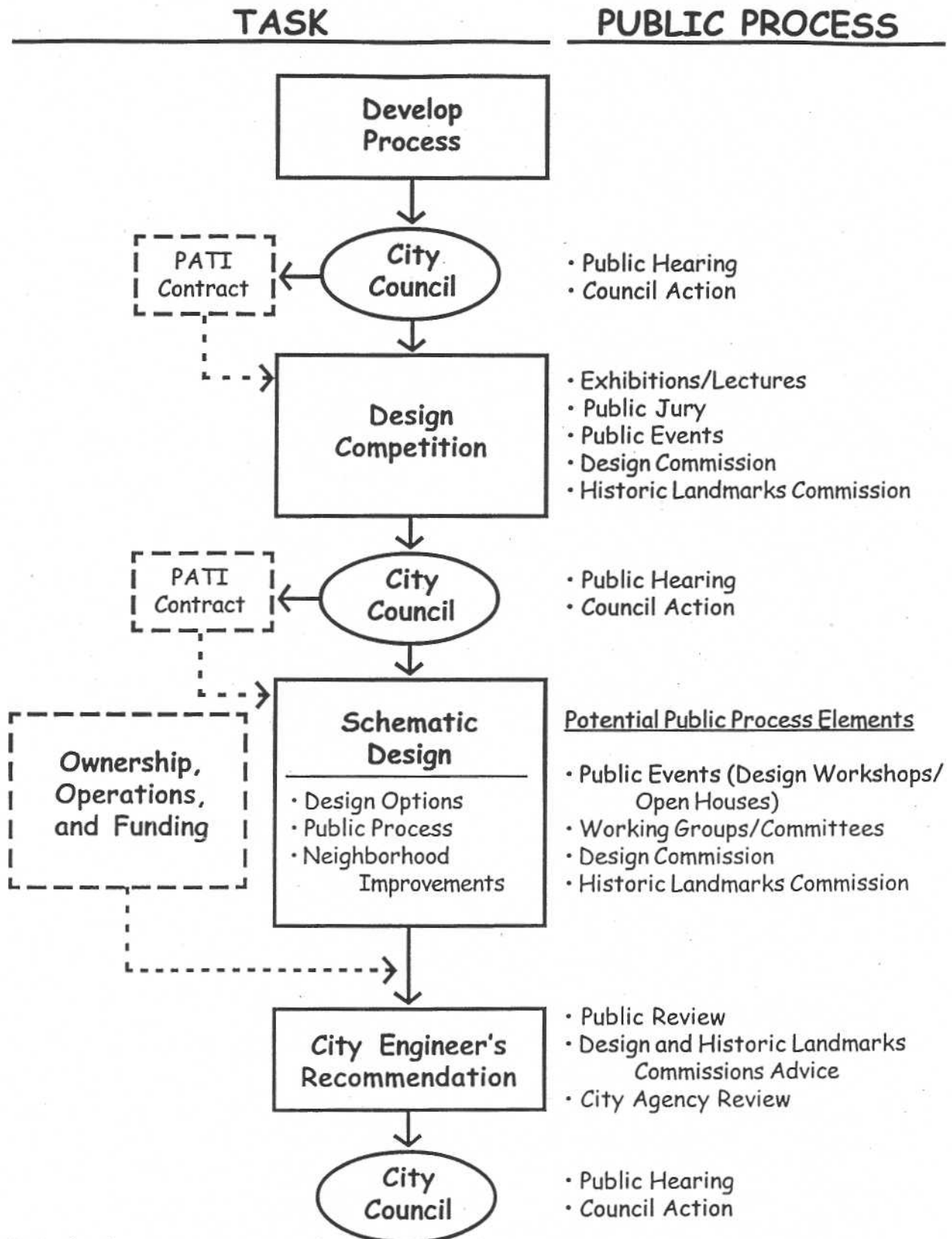


FIGURE 2

OHSU/North Macadam Aerial Tram
Design Development Process

- *Lectures* – Concurrent with the exhibitions, lead members of the design teams may also be required to participate in a lecture series. As with the exhibitions, this will provide an opportunity for the public to view the work of the teams, as well as to hear the designers describe their work, offer perspectives on architecture and design trends, and respond to issues that attendees may raise.
- *Workshops/Open Houses* – During the schematic design phase, there will be opportunities for the public to interact with the design teams in workshop or open house settings. These events should be designed to assemble meaningful input on design issues as well as to provide opportunities for strengthening the design concepts or allowing new ideas to surface.
- *Committees/Working Groups* – Smaller groups of stakeholders working more intensively on the design problem may be utilized to provide an additional level of involvement and feedback.
- *City Advisory Group* – An advisory group of key City stakeholders will be formed to help assist the City Engineer in formulating recommendations on the Tram. Both the PDOT and PATI Project Managers will be expected to work with this group as a part of the technical team for the Tram.

2.3 Design and Historic Landmark Commissions

The Design and Historic Landmarks Commissions will be engaged in the design process in order to provide advice to the City Engineer. The process for engaging these commissions will be the same as that used for other transportation projects, including light rail and streetcar. PDOT anticipates that the commissions will be briefed at the outset of the process and will have an opportunity to provide advice on the design proposal as it is being developed.

At a minimum, the commissions will have the opportunity to provide advice and feedback on the design competition approach, design criteria, and proposed schematic design options. While these sessions are not formal land use hearings, they will provide important information to the design team as they move the project forward.

2.4 Portland Development Commission

PDOT staff will provide briefings to the Portland Development Commission as needed or requested. The Commission may be asked to provide advice, and may also choose to offer recommendations to the design team and/or City Council.

2.5 City Council Hearings

The City Council will hold public hearings on the proposed process and, most importantly, on the final recommendation forwarded from PDOT. These hearings will provide an opportunity for the public to comment on the design proposal, and for

Council to hear those comments prior to deciding to approve, reject, or modify PDOT's recommendation.

It is also probable that Council will be briefed on the outcome of the design competition prior to a contract being let for the schematic design phase. While not a hearing, this session may also provide another avenue for public involvement in the process.

2.6 Portland Aerial Transportation, Inc. Board

As part of any initial funding commitment to Portland Aerial Transportation, Inc. (PATI), the City will request that the PATI Board create three new board positions for the City – two for City representatives and one for a community member.

3.0 Design Criteria

An important component of the design development process for the tram will be the development of design criteria. These criteria will provide guidance for the design teams during both the design competition and the schematic design phases of work.

Design criteria will be especially useful in ensuring that the design ideas for the tram take into account critical design issues. These issues may range anywhere from aesthetic considerations to technical requirements to community impact issues.

The design criteria should be developed in an open public process so that community members can help shape the underlying issues that will guide design decisions. It will also be important to gather advice from the Design Commission and Historic Landmarks Commission on the proposed design criteria.

4.0 Design Competition

4.1 Purpose and Goal of the Design Competition

Portland Aerial Transportation, Inc. (PATI), the project sponsor for the tram, set a goal to design a tram that “will meet the highest standards of architecture and urban design” (Portland Aerial Transportation, Inc. Purpose and Goals – 5/10/02).

In order to help achieve this goal, the design competition will be used to select a design team that will lead the design of the tram. The purpose of the competition is to select the best design team for the project rather than a “winning design,” although competitor's design ideas will be an important part of their submittals. The winner of the competition will be charged with developing a schematic design for the tram.

4.2 Selection Factors

The competitors will be evaluated and a winning team will be selected based on the following factors:

1. The experience of the team in working on unique, complex structural, architectural and urban design problems.
2. How well the team understands the design problem.
3. How well the team understands the design context. (The Hill, North Macadam, South Portland, and Portland)
4. How the team would propose to engage the community in the final design process.
5. The quality of the team's initial design concepts and ideas.

4.3 Competition Approach

The overall approach for the competition is contained within three phases:

- Phase 1 – Organizing the competition
- Phase 2 – Selecting the competitors
- Phase 3 – Competitors prepare their submittals

The actual competition ends with Phase 3 when a jury evaluates competitor submittals and makes a recommendation for the winning team. The winning team will then be engaged to embark on continuing phases of work, including the preparation of schematic design ideas (described below under Task 5) and potentially final plans, specifications, and estimates for bidding and construction.

4.4 Organizing the Competition

4.4.1 Competition Advisor

Portland Aerial Transportation, Inc. (PATI), the project sponsor, has retained Reed Kroloff from Washington, D.C., to be the Competition Advisor. With Mr. Kroloff's counsel, the overall approach has been formalized. Mr. Kroloff will assist throughout the process. Initially, in addition to his organizing role, Mr. Kroloff will develop a "short list" of firms that in his judgment potentially fit the scope of the design problem and offer the type of creative design expertise desired for this project. Mr. Kroloff will then assist in the screening of the firms to a final group of competitors and will also then manage the jury process at the end of the competition.

4.4.2 Jury Selection

Mr. Kroloff has recommended that a jury of seven members be enlisted to hear competitor presentations and evaluate the final competitor submissions. Mr. Kroloff recommends that four members be from outside the Portland area and three be from the greater Portland area community. The four outside members will likely all be related to the "design profession", but not necessarily all practicing architects or

engineers. The PATI Board will develop criteria for the local Board members and will then solicit members.

4.5 Selecting the Competitors

4.5.1 Interviews

A key step in the process of selecting a final group of competitors will be the screening of the initial short list of 15± firms to a group of 6-7 firms. Mr. Kroloff has recommended that we interview this group of firms to help select the final 4 or 5 competitors.

The interview team will include the PATI Board, two members from the general community and one of the outside members of the jury.

4.6 Community Participation

PDOT and PATI have committed to a process that has increasing community participation as the process unfolds.

4.6.1 Design and Historic Landmarks Commissions

Initially, PDOT and PATI representatives will brief the Design and Historic Landmarks Commissions on the overall process and solicit their thoughts on all aspects of the process. Once a winning team has been selected, that team will also engage the commissions in a discussion of design ideas, issues and factors to be considered as the team prepares a full schematic design.

4.6.2 Public Events

Competitors will be required to travel at least once to Portland during the competition phase to visit the site area and attend scheduled public events. These events would likely take the form of design association-sponsored lectures, and would provide an opportunity for community members to learn about the various teams' body of work and expertise. These events will also give the competitors an opportunity to hear about design issues that Portlanders consider important.

In addition to these events, the jury process will be open to the public. This will provide an opportunity for community members to observe the dialogue taking place between the jury and the design teams and to understand the team selection process and rationale.

4.7 Council Action

At the end of the Design Competition phase, City Council will be briefed on the outcome of the competition and the selected design team. If there is a contract to be let for the Schematic Design phase that involves the City, Council will likely be asked to take action on it at the time of the briefing. As with other phases, Council has the ability to approve, reject, or modify the contract at that time.

5.0 Schematic Design

Once the preferred team has been selected through the design competition, a contract will be negotiated and let to provide schematic designs for the tram proposal. As stated in the design competition approach, the end result of the design competition is the selection of a design team, not a design concept. The schematic design phase of this process is intended to flush out concepts presented in the competition and/or to generate new design ideas.

The design team will be asked to prepare a scope of work that describes the services they will provide through the schematic design phase and the methods they will use to meaningfully engage the community in the design process. As described earlier in the scope, the teams will be judged during the design competition phase in part on their proposed approach to public involvement in later stages of work. During the schematic design phase, there must be ample and meaningful opportunities for the public to help shape and inform the final design of the tram.

At a minimum, the public process during the schematic design phase will include:

- Prior to schematic design commencing:
 - Solicitation of advice from the Design and Historic Landmarks Commissions.
 - A public event led by the design team describing the concept(s) generated through the design competition and soliciting feedback and additional ideas.
- During schematic design:
 - Public workshops/open houses presenting design ideas and options to the public for feedback.
 - Clear and consistent communication with the public.

6.0 Identification of Mitigation and Neighborhood Improvements

During the Schematic Design Phase, the design team, working with City staff and the community, will be asked to identify potential mitigation or neighborhood improvement projects associated with the tram. The intent of this phase of work is to ensure that the tram is integrated into the neighborhood fabric, and that surrounding neighborhoods achieve some form of benefit from the project as a whole.

At this point, some initial ideas have been forwarded in the PDOT recommendations. Those ideas include:

- Undergrounding utility lines along or adjacent to the tram alignments.
- Implementing some or all of the South Portland Circulation Study.
- Providing neighborhood pedestrian and bicycle connections, including crossings of I-5 and Barbur Boulevard.
- Creating a property value guarantee program in the event that the project reduces values along the tram alignment.
- Identifying other needed neighborhood improvements that help ensure the vitality and continued strengthening of the surrounding community.

The process for identifying these improvements must be an open process that responds to neighborhood needs and desires. It is probable that the improvements identified through this process will not be fully funded or implementable on the same time line as the tram project. However, the process should still place a premium on the neighborhood, city, and design team collaborating on the identification and prioritization of these improvements.

The identified improvements, along with proposed budgets and a prioritization schedule, will be presented along with the results of the Schematic Design phase to City Council.

7.0 Council Action

The end result of the Design Development process will be a recommendation from PDOT to City Council on the proposed design for the tram, including mitigation and/or neighborhood improvements. City Council will hold a public hearing prior to approving, rejecting, or modifying PDOT's tram proposal.

At the time that Council takes up consideration of the design proposal, it is also likely that Council will be asked to approve, reject, or modify an implementation strategy for the tram. The implementation strategy, which is being undertaken in a parallel process to the design development phase, will address capital and operating expense plans and ownership issues.

Preliminary Schedule

Phases I - III - Design Competition

Phase I - Organization July - November, 2002

- Retain Competition Manager
- Prepare and Confirm Competition Budget, Scope
- Present Competition Process to City Council

Phase II - Select Competitors - November - December, 2002

- Identify Potential Competitor Long List (15± firms)
- Screen to Short List (6-7)
- Schedule interviews with short list
- Select final competitors (4-5)

Phase III - Competition - January - March, 2003

- Notify final four teams
- Public lectures, other public events with competitors
- Competitor Submission Deadline
- Competition Jury - Recommendation of final design team to PATI Board

Phases IV - V - Schematic Design/Engineering

Phase IV - Design Process with Selected Team - April - September, 2003

- Negotiation of design contract
- Final team prepares design of "tram" including upper and lower termini, single structural tower, pedestrian bridge; tram systems, related elements
- Public input to design team
 - Design Commission/Historic Landmarks Commission
 - Neighborhoods
 - Other community forums
 - Other
- Presentation of Recommended Design to Council for approval, rejection, or modification

Phase V - Preparation of Construction Plans/Contracting/Construction

- Begin Engineering - October 2003 -
- Construction Begins - October 2004
- Tram Opens - July 2005

Roles and Responsibilities

Roles

The Suspended Cable Transportation System (SCTS) process approved by City Council on May 23, 2002 provides a framework for decision making related to the OHSU/North Macadam Tram. Early phases focused developing a decision making process and analyzing alternative approaches for connecting North Macadam to OHSU. Later phases seek to build upon and further refine the work and recommendations of earlier phases.

The process is underlain by the assumption that the tram will be a publicly accessible transportation facility operated within the public right-of-way, or over areas where a SCTS is allowed by code. City Code grants authority to the City Engineer in PDOT to plan, design and regulate activities within the right-of-way. In relation to the tram, the process is set up to allow the City Engineer, through his code authority, to develop recommendations for City Council consideration.

Given these assumptions, the City Engineer's (and by extension, his staff's) role in the process is to guide the development of sound recommendations that City Council can take action on (Figure 3). This role means that a variety of issues must be considered by the City Engineer in formulating these recommendations.

In order to develop a sound recommendation for City Council consideration, it is critical that the design development phase be approached in a collaborative, team-oriented manner. PATI and the City of Portland are committed to working together to produce the best possible design for the tram, and will assume the general roles as outlined below.

Project Team

PATI

Competition Manager

- Reed Kroloff

Project Manager

- Gordon Davis, PATI Secretary

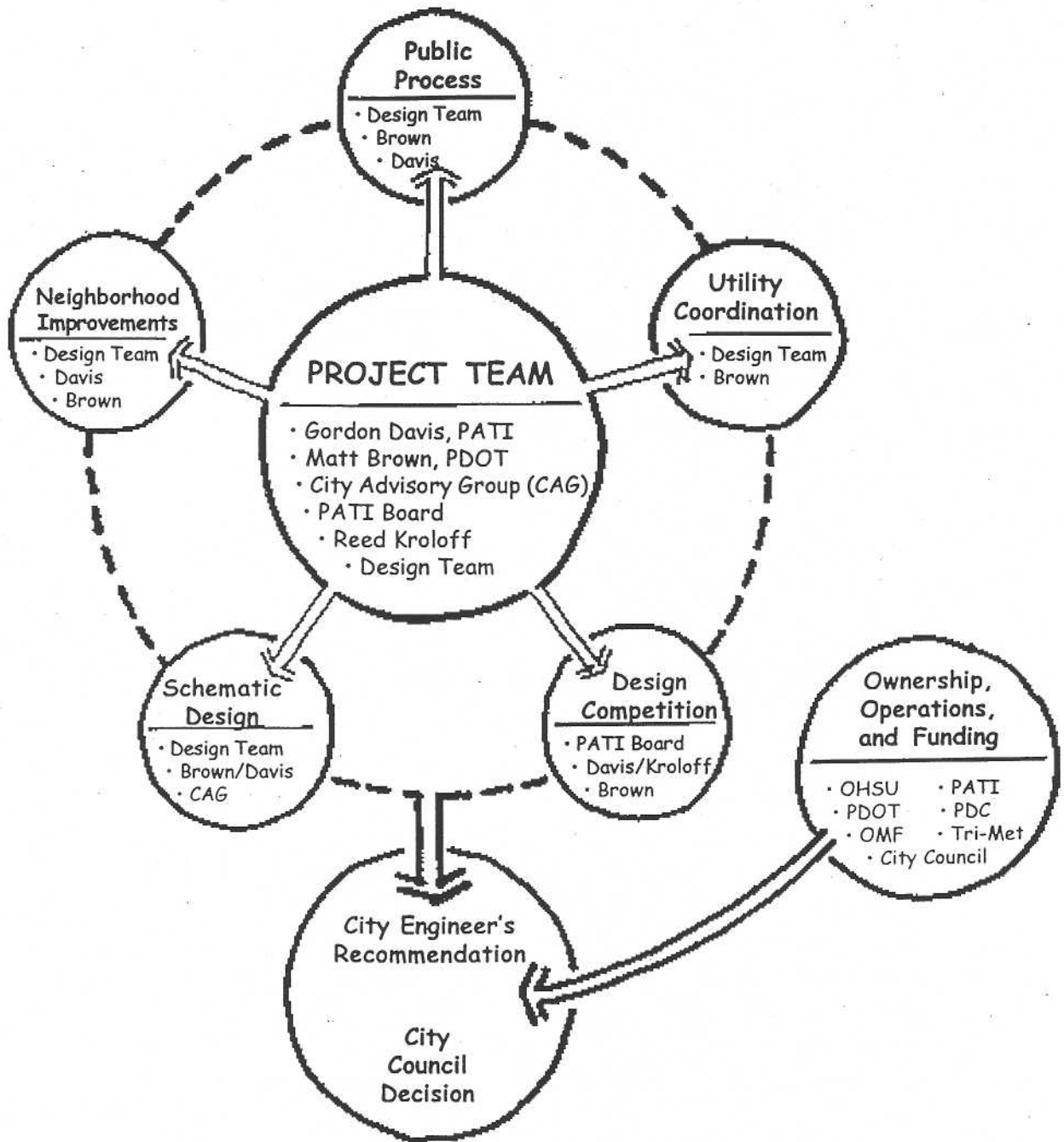
City of Portland

Project Manager

- Matt Brown, PDOT

City Advisory Group

- Cheryl Twete, PDC
- Kia Selley, PDC
- Jeff Joslin, OPDR
- Joe Zehnder, Planning
- Zari Santner, Parks
- Matt Brown, PDOT



OHSU/North Macadam Aerial Tram
Roles and Responsibilities

FIGURE 3