

## Attachment B

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## DESCRIPTION OF CATEGORIES

### 1. **Historic Preservation:**

- 1.1 Covers “Historic preservation” (NIGP code 906-48-00), “Historical studies and services” (906-57-00 and 956-30-00), and “Archaeological services” (961-01-27).
- 1.2 A-E Experience Category/Profile Codes:
  - a) H08 – Historical Preservation
  - b) E01 – Ecological & Archaeological Investigations
- 1.3 The Office of Planning (OP) promotes stewardship of the District’s historic and cultural resources through planning, protection, and public education; administers the District’s local preservation program under the DC Historic Landmark and Historic District Protection Act; acts as the certified state historic preservation program under the National Historic Preservation Act; and provides recommendations to the District’s Historic Preservation Review Board.
- 1.4 OP’s Historic Preservation Office requires Contractors to provide historic preservation and archeological services, which may include any or all of the following (please note that Contractors should meet the professional qualifications standards of 36 CFR 61 for historic preservation, archaeology, and other pertinent disciplines):
  - a) Providing technical assistance to community groups, neighborhood associations, ANCs, and citizen organizations.
  - b) Providing education and outreach services to encourage further study and research on the architectural, historic, and cultural resources of their neighborhoods.
  - c) Working with homeowners, civic groups, and members of the business community to inform them of the economic and community stabilization advantages of historic preservation, adaptive use possibilities, federal tax incentives, and local funding programs.
  - d) Providing historical research on selected topics, involving the research and documentation of major historic contexts and individuals significant to the historical development of the District of Columbia, to assist the HPO in evaluating the significance of potential historic properties in the District and presenting information on the city’s historic resources in a manner that promotes public understanding of their importance.
  - e) Providing historic resource surveys, landscape surveys, local/national register nominations, multiple property documentations, and historic district photo documentation.
  - f) Developing design guidelines for historic districts and other properties, including diagrams, renderings, and photographs to illustrate preservation issues and principles.
  - g) Preparing informational and educational brochures on historic properties and neighborhoods, and web-based means of distributing such information.
  - h) Writing historic structures reports and community histories.

- i) Providing archaeological services, including assisting with organizing OP's files, site forms, and collections; populating a GIS survey database with archaeological data; preparing site form location maps using GIS; inventorying and cross referencing archaeological survey forms with District site forms; conducting map research and preparing archaeological evaluations; conducting site visits and preparing draft archaeological review reports; updating an MS Access database for archaeological site data; and conducting other historical research and related services, as directed by the State Archaeologist.
- j) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**2. Urban Planning and Zoning:**

- 2.1 Covers "Urban planning" (918-92-00), "Urban planning consulting" (926-72-00), and "Zoning, land use studies" (961-94-00).
- 2.2 A-E Experience Category/Profile Codes:
  - a) C08 – Codes, Standards, Ordinances
  - b) P05 – Planning (Community, Regional, Areawide and State)
  - c) Z01 – Zoning, Land Use Studies
- 2.3 OP provides a broad range of plan development, implementation, and project coordination services for District neighborhoods, central Washington, and the waterfront area. Responsibilities include developing small area plans and planning studies and coordinating and tracking plan implementation, developing design strategies and guidelines, managing the public space program, and incorporating environmentally-sound action into the ongoing development of the District.
- 2.4 OP requires Contractors to provide urban planning and zoning services, which may include any or all of the following:
  - a) Developing a small area plan for a neighborhood, commercial corridor, or district to include a vision statement, development goals, and implementation strategies. Small area plans typically include an existing conditions analysis, land use recommendations, urban design framework, zoning analysis, schematic renderings and site plans for development opportunity sites, and associated plan recommendations.
  - b) Analyzing and producing an existing conditions report including preparing a Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis, mapping community assets, analyzing opportunities, issues, and constraints, using narrative and graphics to communicate key findings related to a specified study area.
  - c) Conducting community visioning and goal setting to inform planning processes.
  - d) Developing urban design plans and place-making frameworks for particular areas which build on the characteristics of existing buildings and proposed new buildings to define the space and shape the associated place-making qualities.

- e) Establishing guidelines for future development and zoning in a particular area to give residents confidence in the future direction of development.
- f) Conducting building stock surveys and zoning analyses to determine current and future development capacity.
- g) Developing conceptual site plans, renderings, and streetscape sections to illustrate plan recommendations or design principles. Includes providing “rapid response site planning and charrette services,” which are smaller projects with shorter timeframes that include creating site plans and schematic design documents for catalytic development sites identified within completed small area, revitalization, and corridor plans. The design products shall be prepared either through individual consultation with the property owner and OP or through a half-day public charrette.
- h) Identifying best practices for special urban planning topics including: destination development, niche market branding, implementation of funding strategies, and urban design concepts (from best practices to enhance the livability of the city (e.g., sidewalk management, neighborhood connectivity, and public space enhancements)).
- i) Providing analysis of impact of small area plan implementation (District budget, zoning changes, development program, total program square footage, estimated property values and tax revenues, incremental households, demographics, traffic and transportation, schools, etc.).
- j) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**3. Economic Development Planning:**

- 3.1 Covers “Economic development” (961-28-00) and “Economic impact studies” (961-29-00).
- 3.2 A-E Experience Category/Profile Codes:
  - a) P05 – Planning (Community, Regional, Areawide and State)
  - b) U02 – Urban Renewals, Community Development
- 3.3 OP requires Contractors to provide economic development planning services, which may include any or all of the following:
  - a) Conducting analyses of the District’s core and emerging economic sectors / clusters, including assessments of jobs, income and revenue impacts.
  - b) Identifying existing and potential business/industrial clusters or commercial niches; highlight strategies and policies for fomenting their growth, attracting targeted businesses or retaining existing businesses.
  - c) Assessing regional positioning and competitive advantages, including key asset and opportunity analysis.
  - d) Producing strategies to strengthen economic development in the District’s neighborhoods and citywide.
  - e) Developing performance metrics for evaluating economic development strategies, such as the number of jobs created and private sector investment leveraged.

- f) Developing implementation frameworks that take into account the funding, capacity and organizational environment. Assisting with review of implementation progress and performance measures.
- g) Reviewing issues and opportunities associated with economic development support systems, such as educational, workforce and small business development.
- h) Preparing detailed market analyses that determine the overall supply and demand for uses, including residential, commercial, mixed-use, and industrial, and may include surplus/leakage analysis in terms of revenue and square footage.
- i) Assessing the feasibility of a project and/or potential niche market strategy.
- j) Preparing and executing a business improvement strategy, including corridor- or sector-based.
- k) Assessing existing conditions, constraints, and opportunities including zoning, land use, existing business/industry, vacant/underutilized property, public property, current developments, and transportation/transit, and sustainable development.
- l) Preparing Strengths-Weaknesses-Opportunities-Threats (SWOT) analyses and best practice assessments.
- m) Completing ProForma analyses for redevelopment opportunity sites, including development costs, supportable square footage/number of units, parking, and various price points per unit.
- n) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

#### 4. **Architecture and Urban Design:**

- 4.1 Covers “Land development and planning – architectural” (906-64-00), “Land development and planning – architectural” (906-57-00), and “Architectural consulting” (918-15-00).
- 4.2 A-E Experience Category/Profile Codes:
  - a) S11 – Sustainable Design
  - b) U02 – Urban Renewals, Community Development
- 4.3 OP requires Contractors to provide architecture services, which may include any or all of the following:
  - a) Developing design guidelines for individual buildings, districts, neighborhoods, and parks and open spaces.
  - b) Developing conceptual site plans, renderings, diagrams, and streetscape sections to illustrate plan recommendations or design principles.
  - c) Analyzing urban design and built environment issues through analytical plan diagrams, massing diagrams, sectional drawings, and sketches.
  - d) Providing “rapid response site planning and charrette services,” which are smaller projects with shorter timeframes that include creating site plans and schematic design documents for catalytic development sites identified within completed small area, revitalization, and corridor plans. The design products shall be prepared either through individual consultation with the property owner and OP or through a half-day public charrette.

- e) Providing programming services, including assembling a programming team, identifying and prioritizing project values, determining project goals, identifying project constraints and opportunities, gathering and analyzing data, and documenting project requirements.
- f) Providing site analysis services, including program investigation, site inventory and analysis, site evaluation, and report development.
- g) Providing accessibility compliance, including projecting general ADA needs, identifying a project's potential accessibility problem areas and desired outcomes, compiling plan and review matrices, identifying strategies for correcting problem areas, preparing implementation schedules with cost analyses, and developing prototype design details for implementation.
- h) Providing building design services, including developing project understandings, schematic design documents, and design development documents.
- i) Providing code compliance services, including analyzing preliminary design, preparing preliminary reports including code summaries and potential code-related design issues.
- j) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**5. Environmental Planning:**

5.1 Covers "Planning and advisory services, environmental" (956-30-00), "Impact studies, environmental" (926-52-00), and "Environmental impact studies" (961-32-00).

5.2 A-E Experience Category/Profile Codes:

- a) C14 – Conservation and Resource Management
- b) E09 – Environmental Impact Studies, Assessments or Statements
- c) E11 – Environmental Planning
- d) E13 – Environmental Testing and Analysis
- e) S11 – Sustainable Design

5.3 OP requires Contractors to provide environment planning services, which may include any or all of the following:

- a) Preparing existing conditions reports for environmental conditions within a neighborhood, corridor, or district.
- b) Providing sustainability services and indicators, and recommend policies and programs to advance sustainability goals.
- c) Leading community visioning and goal-setting sessions to develop a shared definition of sustainability at the neighborhood or ward level.
- d) Identifying potential environmental or sustainability indicators to be tracked over time to measure how a community is progressing toward sustainability goals.
- e) Providing innovative techniques of enhancing and preserving parks and open spaces to meet active and passive recreational needs.
- f) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**6. Transportation Planning:**

- 6.1 Covers “Transportation consulting” (918-96-00) with an emphasis on bicycle-, pedestrian-, and transit-focused transportation planning.
- 6.2 A-E Experience Category/Profile Code:  
a) T03 – Traffic & Transportation Engineering
- 6.3 OP requires Contractors to provide transportation planning services, which may include any or all of the following:  
a) Completing an assessment of existing roadway, traffic, transit, bicycle/pedestrian, and parking conditions and levels of service in the Project Areas.  
b) Reviewing development concepts and developing travel forecasts and assessments of roadway Level-of Service and other modal impacts. Develop strategies and recommendations to ensure developments provide pedestrian, bicycle, and transit connectivity and encourage walking, bicycling, car sharing, and transit use.  
c) Developing strategies and recommendation consistent with policies in the Comprehensive Plan to provide a safe, sustainable, healthy, efficient, multi-modal transportation system that enhances the quality of life for neighborhood residents and visitors to the District.  
d) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**7. Facility Planning:**

- 7.1 Covers building programming, civic architecture, interior planning, space planning, and capital improvement planning.
- 7.2 A-E Experience Category/Profile Codes:  
a) I05 – Interior Design, Space Planning  
b) P06 – Planning (Site, Installation, and Project)
- 7.3 OP requires Contractors to provide facility planning services, which may include any or all of the following:  
a) Develop services and facilities plans to provide guidance in prioritizing capital improvement projects and addressing the spatial needs of District agencies. These plans are long-range planning documents developed through a number of data gathering tools, such as:  
i. Facilities Condition Assessments that develop a comprehensive examination and database on existing physical conditions and the functional performance of facilities as they relate to architectural, structural, mechanical, electrical, and other life and safety deficiencies.  
ii. Space Utilization Surveys to examine current physical space allotments and their impact on achieving an agency’s operational needs and mission and create space standards that improve government facilities and minimize costs.

- iii. Area context analyses that examine issues including land use/zoning policy and urban design.
- iv. Strategies to determine maximizing economic and spatial efficiencies between District agencies.
- v. Innovative public-private partnerships and site selection criteria that encourage co-location and mixed-use projects at key locations.
- vi. Implementation strategies and recommendations that include issue identification, proposed actions, responsible implementation parties, projected timeframe, and costs and other fiscal impacts.
- vii. Recommendations for program and development phasing with respective uses.

**8. Market Studies:**

8.1 A-E Experience Category/Profile Code:

- a) P05 – Planning (Community, Regional, Areawide and State)

8.2 OP requires Contractors to provide market studies, including the following:

- a) Preparing detailed market analyses that may determine residential, commercial and institutional/non-profit demand for an area or corridor.
- b) Researching and documenting demographics, employment, income, real estate sales, sale amounts, commercial inventories, land areas, zoning at time of sale, and recent and projected construction cost estimates.
- c) Preparing market projections that include proposed commercial and retail lease-up and absorption rates.
- d) Assessing trade area performance, surplus/leakage (for example in terms of spending and square footage), and real estate development and economic trends.
- e) Conducting comparative assessments of market trends in other jurisdictions and evaluating the competitive position of the District.
- f) Developing and providing marketing analyses based on land use/zoning conditions focused upon projections of supportable uses with particular emphasis upon local and citywide/regional retail, office opportunities, and mixed-income housing development. Market analyses should be the base from which land use and development concepts and recommendations are made throughout the study area. Market projections should include components such as proposed commercial and retail lease-up, job creation and income/revenue generation, real estate absorption and occupancy, and housing/residential rental rates and sales prices for recommended uses.
- g) Providing needed graphics and charts to illustrate the primary and secondary market areas by relevant census tracts.
- h) Producing presentation materials, including PowerPoint presentations, boards, and summary documents, and participating in public meetings to present findings.

**9. Demographic Analysis:**

9.1 A-E Experience Category/Profile Code:

a) P05 – Planning (Community, Regional, Area wide and State)

9.2 OP requires Contractors to provide demographic analysis services, which may include any or all of the following:

a) Reviewing existing conditions of an area, including the following:

- i. environmental and sustainability data
- ii. demographics
- iii. socio-economic portrait (employment, income, etc.)
- iv. land uses
- v. zoning
- vi. vacant and underutilized property
- vii. institutional/community anchors
- viii. historic resources
- ix. transportation and mass transit connectivity
- x. open spaces/recreation
- xi. summary of public investments, and
- xii. summary of existing plans/initiatives

**10. Landscape Architecture:**

10.1 Covers “Landscape architecture” (906-56-00).

10.2 A-E Experience Category/Profile Codes:

- a) L03 – Landscape Architecture
- b) S11 – Sustainable Design

10.3 OP requires Contractors to provide landscape architecture services, including the following:

OP requires Contractors to provide landscape architecture services, which may include any or all of the following:

- a) Analyzing and completing research on historic landscapes, including surveying of landscape and park elements and structures, assessing period of significance and determining historic contexts, and protecting and incorporating historic features into contemporary designs.
- b) Preparing existing site analyses and assessments of urban parks, plazas, and streetscapes including circulation patterns, access points, user habits and behavior, health of existing trees and landscapes, urban ecology and ecosystems, environmental performance, topography and drainage, and conditions of existing site furniture, statuary, pathways, and other park features.

- c) Developing landscape design guidelines for districts, neighborhoods, streetscapes, public spaces, and parks and open spaces.
- d) Preparing conceptual site plans, renderings, diagrams, aerial perspectives, sketches, and sections to illustrate design plans for parks, playgrounds, outdoor urban recreational facilities, plazas, and streetscapes.
- e) Developing low impact development strategies for incorporation into urban settings like parks, plazas, and streetscapes.
- f) Providing schematic design documents produced from “rapid response site planning and charrette services” (smaller projects with shorter timeframes) that include creating catalytic streets and landscapes, streetscapes, plaza or park plans for sites identified within completed small area, revitalization, and corridor plans; the design products shall be prepared either through individual consultation with the property owner and OP or through a half-day public charrette.
- g) Providing programming services for parks and open spaces, including assembling a programming team, identifying and prioritizing project values, determining project goals, identifying project constraints and opportunities, gathering and analyzing data, and documenting project requirements.
- h) Preparing Gap Analysis or Level of Services (LOS) Analysis for access to park land within walking, bicycling, and/or driving distances.
- i) Preparing programs and operations analysis of recreation programs to determine effectiveness of service delivery and areas of needed improvement.