



MEMORANDUM

To: CMAP Board

From: Dolores Dowdle
Deputy Executive Director, Finance and Administration

Date: June 4, 2014

Re: Contract Approval for Market and Financial Analysis for Local
Technical Assistance Projects

The CMAP Local Technical Assistance (LTA) program is meant to advance the implementation of GO TO 2040 by providing resources to local government. Approximately 50 LTA projects are currently underway, with more in early scoping and project development stages. Projects include comprehensive plans, corridor or subarea plans, studies of special topics such as housing or water resources, and similar planning activities.

Many of the LTA projects would benefit from being supplemented by detailed market or financial analysis. In a number of cases, a refined understanding of the market for certain development types would help to guide plan recommendations. The LTA program includes a focus on implementation, so it is important to consider the market and fiscal realities that face the plans prepared through the LTA program. While CMAP has some ability to conduct market and fiscal analysis work internally, expanding this capacity by contracting with a consulting firm is desired.

A Request for Proposal (RFP) was issued to firms to provide market or financial analysis for LTA projects. The proposals were requested to address two potential activities: (1) high-level market analysis; and (2) market analysis to inform specific plan recommendations. The RFP was sent to potential contractors as well as posted on the CMAP website. Five proposals were received from the following firms:

- Business Districts, Inc. (BDI)
- Gensler
- Houseal Lavigne Associates
- Jones Lang LaSalle (JLL)
- Valerie S. Kretchmer Associates (VSKA)

Proposals were reviewed by a team comprised of Bob Dean and Nicole Woods. The team based their evaluation on the criteria listed in the RFP:

1. The demonstrated record of experience of the contractor as well as identified staff in conducting market analysis of the types described in the Scope of Services.
2. The clarity and appropriateness of the contractor's approach to the two types of projects described in the Scope of Services.
3. The experience of the firm in conducting similar projects in a variety of geographic contexts for public sector clients, as indicated through the quality and relevance of the examples of similar work.
4. The reputation of the firm or organization based on references.
5. Cost to CMAP, including consideration of per-hour costs.

Costs were calculated based on hourly costs at different staff levels, as well as the cost of sample projects. Average costs were approximately \$175 per hour at the principal level, \$125 to \$165 at the senior project manager level, and \$75 to \$100 for project manager or support staff. Hourly costs below these amounts resulted in higher scores, and hourly costs above these amounts resulted in lower scores. Similarly, average sample projects were in the \$15,000 to \$25,000 range each. Firms that provided sample projects that were typically below \$15,000 received higher cost scores, and firms with sample projects over \$25,000 received lower cost scores. Overall, cost scores ranged from 2 on the low end to 8 on the high end.

The review team reviewed all proposals, with scores shown in the following table. The review team interviewed the three firms receiving the highest scores: BDI, Houseal Lavigne and VSKA. While other firms that submitted proposals appear qualified to conduct the work, these three firms demonstrated the greatest understanding of CMAP's needs and provided the most rigorous detail in their proposals.

Criteria	Maximum	BDI	Gensler	HLA	JLL	VSKA
Demonstrated expertise in market analysis	20	17.5	12.5	14.5	13.0	17.5
Project type 1: high-level market analysis	25	15.9	12.5	15.1	12.8	21.5
Project type 2: market analysis for specific recommendations	25	17.8	15.6	17.3	13.9	22.0
Demonstrated expertise with similar projects	20	17.0	12.5	18.5	9.0	20.0
Cost	10	8.0	6.0	6.0	2.0	7.0
TOTAL	100	76.2	59.1	71.4	50.7	88.0

Following the interviews, staff came to consensus to recommend **Valerie S. Kretchmer Associates (VSKA)** to receive this contract. VSKA had the highest ranked proposal and also demonstrated their project understanding and abilities in the interview. VSKA demonstrated the ability to work across the metropolitan region and also had significant experience working as a subconsultant for planning firms or directly for municipal clients. They also provided the

most detailed descriptions of their approach for each assignment, and provided a set of sample projects that very closely matched the types of projects that CMAP expected to assign.

It is recommended that the Board approve a contract with Valerie S. Kretchmer Associates (VSKA) for up to \$50,000 to assist with market and fiscal analysis for LTA projects. Support for the contract is included in the FY 2015 budget from UWP contract funds.

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Chicago Metropolitan Agency for Planning

Agenda Item No. 5.2

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MEMORANDUM

To: CMAP Board

From: Dolores Dowdle
Deputy Executive Director, Finance and Administration

Date: June 3, 2014

Re: Annual Commercial Data Renewal

CMAP maintains large data resources for use in its development, projection, and evaluation of land use and transportation in the northeastern Illinois region. The required data is reviewed to determine how the data sets are used by staff, which staff uses the data sets and how frequently the data is used. If the data is not available from a free source, it must be purchased. The following data sets are being requested for purchase:

DATA SET	VENDOR	RENEWAL DATE	COST
Annual aerial photography for Cook, DuPage, Kane, Kendall, Lake, McHenry and Will Counties. Full cost of project over \$1.3 million. CMAP will be provided an entire set of the orthorectified imagery for the project area.	Partnership includes seven counties of northeast Illinois, CMAP and U.S. Geological Survey. Cook County is lead agency	7/1/2014	\$50,000
New real estate transactions, including foreclosures and tax sales.	Record Information Service	8/14/2014	\$800
New residential subdivision sites.	MetroStudy Online	10/1/2014	\$22,000
Commercial real estate information--national, regional, market and submarket trends and forecasts for rent, vacancy and inventory for apartments, office space, retail spaces and warehouses throughout the region.	Reis, Inc.	10/31/2014	\$10,000
Listing of utility patents issued to organizations, corporations, universities and government agencies.	US Patent and Trademarks Office	11/15/2014	\$200
Online access to proposed, planned and new commercial construction data.	Reed Connect	11/1/2014	\$5,000

DATA SET	VENDOR	RENEWAL DATE	COST
Economic forecasts by county	Woods and Poole	7/1/2014	\$3,500
Annual tax bill information	Lake County Assessor's Office	11/29/2014	\$500
Annual tax bill information	Will County Assessor's Office	11/29/2014	\$500
Residential building permit data	US Census Bureau-Building Permits	12/29/2014	\$200
Academic licensing data	Association of University Technology Managers	12/30/2014	\$400
Regional data and analysis tools targeted to regional workforce and economic development professionals	EMSI	1/21/2014	\$14,000
Vehicles, types and location	Illinois Secretary of State-License Plates	1/26/2014	\$500
Current and cumulative US export and import data for over 18,000 export commodities and 24,000 import commodities	USA Trade Online	2/21/2014	\$300
Commercial real estate online database used to establish baseline market and economic conditions for municipalities.	CoStar Group	3/31/2014	\$33,000
Online database subscription services to business intelligence data, including: Locations (HQ and franchises), number of employees per location, NAICS/SIC codes, street address, corporate linkage information, bankruptcy indicators, DUNS number, Fortune 1000 rank, small business indicator and other elements	Dun & Bradstreet	6/15/2015	\$145,000
Semi-customized version of software application to CMAP used for the economic development impact analysis of major capital projects	TREDIS	6/30/2015	\$20,000
GIS files of nature preserves, threatened and endangered species and IL natural areas inventory	IDNR	6/15/2015	\$5,000
TOTAL			\$310,900

It is recommended that the Board approve 1-year renewals of the itemized datasets listed above at \$310,900. Support for these commercial data sets purchases are included in the FY 2015 UWP operating funds.

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