![Chicago Metropolitan Agency for Planning logo]

Chicago Metropolitan Agency for Planning

233 South Wacker Drive
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Chicago, Illinois 60606

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www.cmap.illinois.gov

MEMORANDUM

To: CMAP Board

From: Angela Manning-Hardimon
             Deputy Executive Director, Finance and Administration

Date: November 10, 2015

Re: Contract Approval for Chicago Region Socioeconomic Forecast

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As a part of the long-range planning process, MPOs are required to develop a long-range socioeconomic forecast to ensure consistency with current and forecasted transportation and land use conditions and trends. Preparing such a forecast requires specialization in not only demographic techniques but also a firm grasp of macroeconomics. Developing such a forecast is beyond current staff capacity. RFP 141 Chicago Region Socioeconomic Forecast was developed in an effort to secure a firm capable of delivering a region-wide socioeconomic forecast to the year 2050 to accompany and inform CMAP's next long-range plan.

A Request for Proposals (RFP) was posted to the CMAP website on September 4, 2015.   A pre-bid meeting was held on September 15th to provide more information on the project.   The deadline for responses was September 25th. Two responses were received:

- Louis Berger Group, Inc.
- Regional Economic Applications Laboratory (REAL) at the University of Illinois

Review Process

Proposals were reviewed and scored by CMAP staff David Clark, Craig Heither and Elizabeth Schuh based on qualifications and the following criteria.

1. The quality, clarity, and reasonableness of the proposed approach.
2. Demonstrated experience in the fields of econometric modeling and forecasting, demography, and population projections.
3. Qualifications of personnel assigned to the project.
4. Responsiveness of the proposal to the scope of services.
5. Cost to CMAP, including consideration of all project costs and per-hour rates.

Table 1: Scoring

Criteria	Maximum	REAL	Louis Berger Group
The quality, clarity, and reasonableness of the proposed approach	40	28	28
Demonstrated experience in the fields of econometric modeling and forecasting, demography, and population projections	10	7	7
Qualifications of personnel assigned to the project	20	12	16
Responsiveness of the proposal to the scope of services	10	8	8
Cost to CMAP, including consideration of all project costs and per-hour rates	20	16 *$120,000*	15 *$124,871*
Total	100	71	74

Recommendation for contractor selection

Following the interviews, CMAP reviewers reached a consensus to select Louis Berger Group, Inc. Berger ranked highest of the two submittals, both with and without cost considerations. The Berger team is highly-qualified to take on this task, having recently completed a 2050 socioeconomic forecast for the New York Metropolitan Planning Council (NYMTC). During the interview they clearly demonstrated their grasp of the goals of GO TO 2040 and the ways that it can inform the reference forecast, identifying opportunities to leverage existing CMAP datasets to adapt the baseline forecast in a cost-effective manner. Documentation of assumptions and forecasting method for the NYMTC forecast (provided as a work sample) was written in a clear and accessible manner; similar documentation for the Chicago Region Socioeconomic Forecast will be critical in communicating forecast results to stakeholders.

It is recommended that the Board approve a contract with Louis Berger Group, Inc. to perform the Chicago Region Socioeconomic Forecast work in the amount of $124,871. All of the work associated with this contract will be completed no later than June 30, 2016. Support for this project is included in the FY14 Contract budget.

ACTION REQUESTED: Approval

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Agency for Planning

MEMORANDUM

To: CMAP Board

From: Angela Manning-Hardimon
           Deputy Executive Director, Finance and Administration

Date: November 18, 2015

Re: Contract Approval for Market Analysis and Development Advisory Services

The CMAP local technical assistance (LTA) program is meant to advance the implementation of GO TO 2040 by providing resources to local governments. Most projects are led by CMAP staff, but some require external assistance to augment CMAP staff expertise. One common type of assistance that is required involves market analysis, which helps to determine the economic feasibility of recommendations included in LTA plans. While CMAP has internal capacity to address many areas of market analysis, specialized professional experience is often necessary to reach a high level of confidence that LTA plan recommendations are implementable.

In addition, CMAP is interested in not just producing LTA plans, but in helping communities to implement their recommendations. This requires experience in a number of areas, including working with communities to attract appropriate private developers.

A Request for Proposals (RFP) for market analysis and development advisory services was issued to 13 consulting firms on August 28, 2015 as well as posted on CMAP's website. A pre-bid meeting was held on September 2nd to provide more information on the project. The deadline for responses was September 25th. Five proposals were received:

- Business Districts Inc. (BDI)
- Bronner Group
- S.B. Friedman
- Johnson Consulting
- Valerie S. Kretchmer Associates (VSKA)

Review Process
Proposals were reviewed and scored by CMAP staff Bob Dean and Donald Hughes based on qualifications and the following criteria.

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 four types of projects – high-level market analysis, market analysis for specific recommendation, language on implementation steps, and plan implementation activities as 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.

Table 1: Scoring

Criteria	Max. Score	BDI	Bronner	Friedman	Johnson	VSKA
Experience	20	18.5	10.5	20.0	14.0	19.5
Approach to project types 1 and 2 (market analysis)	30	26.3	11.8	28.1	20.4	27.5
Approach to project types 3 and 4 (implementation assistance)	30	25.3	17.8	28.0	19.0	18.1
Experience with similar projects	10	9.3	6.6	9.5	7.5	9.0
Cost	10	7.0	5.0	2.0	6.0	8.0
Total	100	86.3	51.6	87.6	66.9	82.1

Recommendation for contractor selection

Following the interviews, CMAP reviewers reached a consensus to select S.B. Friedman & Company as the contractor to provide market analysis and development advisory services. Friedman has excellent experience and top-notch analytical abilities in both conducting market analysis and advancing the implementation of development projects. Overall, as the scores indicate, Friedman was comparable to several other firms in provision of market analysis services, but was clearly the most qualified firm to provide development advisory services. They frequently serve as development advisors for municipal clients, playing a similar role to what CMAP envisioned in this RFP. Friedman was the most costly firm in terms of hourly costs, but also provided numerous examples of projects that within the cost range that CMAP expects for its assignments. Friedman also has a subcontract with Goodman Williams Group, a market analysis specialist that can provide market analysis work at a lower rate.

It is recommended that the Board approve a contract with S.B. Friedman to provide market analysis and development advisory services on a task order basis for a period of one year with one additional option year. The initial year cost for this contract is $100,000. Support for this project is included in the FY16 budget. The option renewal year will be dependent upon performance and the level of approved funding for this purpose. The maximum of the two year contract will not exceed $200,000.00.

ACTION REQUESTED: Approval

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