RFP 149: Forecast Local Allocation Solution

Pre-proposal Information Session
19 January 2016
2:00 P.M.
Lake County Room & Online

David Clark, CMAP
About this session

• Go to Meeting guests are muted
  – Questions may be typed in the question box on your console

• A copy of this presentation will be posted immediately afterwards

• An updated version that includes questions and answers will be posted online by Friday
Today’s Agenda

- About CMAP
- CMAP’s Next Long Range Plan
- Forecast Allocation Background
- Scope of Work
- Project Schedule
- Selection Process
- Questions and Answers
About CMAP

- Established by the General Assembly in 2005
- Official regional planning organization and MPO for northeastern Illinois
- GO TO 2040 comprehensive regional plan adopted in 2010 and updated in accordance with federal law in 2014
The Next Long Range Plan

• The successor to GO TO 2040
  – Build upon and refine objectives
  – Identify new, complementary policy directions
Background & New Requirements

GO TO 2040 & Plan Update

Local Allocation:
• Accessibility/land value measures determine development potential
• GO TO 2040 Preferred Scenario strategies affect dev. potential
• Update: reduced to reflect lower base; redistributed based on updated land use info

Next Local Allocation Requirements:
• Disaggregate regional controls
• New horizon year 2050 with 5-year intervals
• Incorporate GO TO 2040 strategies
• Allow modification for new strategies
• Allow for overrides based on local knowledge
Scope of Work

- **Task 1**: Subzone and Municipal Allocation Solution Design
- **Task 2**: Working Prototype and Staff Training
- **Task 3**: Second Draft
- **Task 4**: Finalization, Acceptance and Documentation
- Final deliverable: December 31, 2016
- Contract period: October 2018
Task 1: Subzone and Municipal Allocation Solution Design

- Establish design/work flow to disaggregate regional forecast controls while accounting for:
  - Interaction of land use, transp. infrastructure, socioeconomic change, and existing development patterns
  - GO TO 2040 planning strategies
  - Market factors

- Deliverable: framework report detailing:
  - Conceptual design and work flow
  - List of required data inputs, including cost & effort estimates for developing new data
  - List of anticipated outputs for subzones and municipalities
Task 2: Working Prototype and Staff Training

• Description:
  – Develop beta version based on Task 1 report
  – Initial training
  – Additional data acquisition efforts completed

• Deliverables:
  – Beta version for testing and comment
  – Draft user guide & full-day training session
  – Up to two day-long workshops at CMAP offices for CMAP committee members and partners
Task 3: Second Draft

• Description:
  – Improvements, refinements, and calibration of beta version based on CMAP feedback

• Deliverables:
  – Draft of Local Allocation Solution
Task 4: Finalization, Acceptance and Documentation

• Description:
  – Completion of all outstanding issues
  – Final product & documentation

• Deliverables:
  – Final version
  – Final User Guide (technical manual)
  – Final report: design, data inputs, work flow, scenario assumptions and interpretation
  – One day of workshops with CMAP committee members
Variables:

- Total Housing Units
- Households
- Population in Households
  - Total
  - Adults (16+)
  - Children (<=15)
  - Workers
  - Income
  - Age of Householder
- Employment
  - Total Employment
  - By NAICS-2

Geography:

- CMAP Region: Cook, DuPage, Kane, Kendall, Lake, McHenry, Will
- Subzone = TDM trip generation zone, based on PLSS quarter-sections
- Municipality using existing boundaries
Datasets

**CMAP**
- Land Use (parcel-based)
- Development Database
- Green Infrastructure
- TDM Network
- Employment
- Population

**Public**
- Road & Transit Network
- Municipal Boundaries
- Parcel/Assessor
- Buildings (some counties)
- Water, Open Space

**Proprietary**
- Dun & Bradstreet
- CoStar
- HERE (Navteq)
- Record Information Services (foreclosures & tax sales)
- MetroStudy
- INSIGHT (Reed Connect)
- REIS
- Woods & Poole
Project Schedule

• 3 February 2016: Proposals due 3:00 P.M.
• 19 & 22 February 2016: Interview finalists
• 9 March 2016: CMAP Board approval
• Late March 2016: Contract begins
• 31 December 2016: Deliverable due
• 31 October 2018: End of contract period
The Selection Process

• In-house selection committee:
  – Demonstrated experience, of both firm and personnel: econometric modeling and forecasting, demography, population projection methods and land-use modeling.
  – Consistency with and demonstrated understanding of the strategies in the GO TO 2040 preferred scenario.
  – Responsiveness of the proposal to the scope of work, as demonstrated through a clearly defined methodology, process, and timeline.
  – Quality and relevance of examples.
  – References.
  – Cost to CMAP, including consideration of all project costs and per-hour rates.
Questions?
Information Session Questions and Answers

• **Q:** Are the earlier allocations that were done for GO TO 2040 and the GO TO 2040 Plan Update available for reference?
  – **A:** They are available, but we would not recommend using them as a foundation or input for any work on this contract. The previous attempts were developed in-house, without expert knowledge. We are hopeful that an experienced consultant can develop a more sound methodology that honors the principles and policy choices of GO TO 2040 (and the next plan) while completely replacing the technical approach.

• **Q:** Does CMAP have land use-based capacity information at the zonal level?
  – **A:** Please refer to Appendix C of the RFP for available datasets. Specifically, the Land Use Inventory and Development Database address existing conditions and pipeline projects, although they are not summarized to the zonal level.

• **Q:** Are consultants to assume that the county-level household and jobs totals delivered by the consultants for RFP 141 are inviolate, or may we model spillover effects from highly developed areas?
  – **A:** The controls from RFP 141 should be strictly adhered to for the local allocation.

• **Q:** Regarding the Task 2 deliverable (beta solution), does CMAP intend for the testing to be performed in-house or by the consultant?
  – **A:** CMAP would like to test the beta solution in-house, with initial documentation and instruction provided by the consultant, to verify that preliminary results are appropriately responsive to input policy parameters.
Pre-Bid Participants

• Geoffrey Hewings (University of Illinois)