

JANUARY 9, 2014



REQUEST FOR PROPOSALS
ECONOMIC DEVELOPMENT PROFILE AND MARKET ANALYSIS

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Contents

1. INTRODUCTION.....	1
1.1 City Information.....	1
1.2 Request for Proposals Purpose.....	1
2. RFP INSTRUCTIONS AND INFORMATION.....	2
2.1 RFP Response	2
2.2 RFP Timeline	2
2.3 RFP Evaluation Criteria.....	2
2.4 Notices	4
3. SCOPE OF WORK.....	8
3.1 Introduction.....	8
3.2 Objectives	8
3.3 Phase 1 – Economic Development Constraints and Opportunities.....	8
3.4 Phase 2 – Economic Development Strategic Action Plan	9
3.5 Phase 3 – Market Analysis Summary	9
4. ADDITIONAL INFORMATION.....	10
4.1 Single Point of Responsibility/Accountability.....	10
4.2 General Questions	10
4.3 Scope of Work Questions	11
4.4 Summary	11
5. RFP RESPONSE SUBMITTAL CHECKLIST.....	11
5.1 Primary Consultant Contact Information.....	11
5.2 Certification Regarding Debarment.....	11
5.3 Services and Pricing.....	11
5.4 Evidence of insurance	12
5.5 Answers to the questions	12
APPENDIX A – ECONOMIC VISION AND GOALS	13

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1. INTRODUCTION

1.1 City Information

The City of Bonney Lake (the “City”) is a residential suburban community located along SR-410 and the shores of Lake Tapps in East Pierce County. The City has a population of approximately 18,000 and encompasses five and half (5.5) square miles. There are approximately 6,050 single-family residences and 550 multi-family residences within the City limits.

For more information about the City of Bonney Lake, visit http://www.ci.bonney-lake.wa.us/section_community/community_resources/new_residents.shtml

1.2 Request for Proposals Purpose

In 2005, the City develop a City-wide economic development plan that was adopted as an element of the City’s comprehensive plan. This document is available at:

http://www.ci.bonney-lake.wa.us/UserFiles/File/Business_Downloads/EconDevPlan.pdf

The City is in the process of rewriting this economic development plan, now referred to as the Economic Vitality Element, as part of the required 2015 Comprehensive Plan Periodic Update. In support of this effort, the City desires to engage a consultant to assist with the following:

- **Phase I:** Economic Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis.
- **Phase II:** Economic Development Strategic Action Plan identifying programs and projects to foster economic growth and development.
- **Phase III:** Prepare a Retail and Non-Retail Sales Analysis and a Market Analysis for specific industries to determine the viability of each industry within the City.

A detailed Scope of Work is outlined in Section 3 of this Request for Proposals (RFP). The City intends that the contract be for no more than one (1) year in duration, to complete the original tasks under the agreed-upon schedule, and to allow the City the ability to request

additional related tasks (if required) to complete the economic development profile and strategic action plan update.

2. RFP INSTRUCTIONS AND INFORMATION

2.1 RFP Response

The proposal response submitted shall contain all information as requested herein, and any additional information necessary to summarize the overall benefit of the proposal to the City. Proposing firms should submit five (5) copies of the proposal no later than February 28, 2014. Proposers are responsible for assuring delivery.

Submittals can be mail to:

Jason Sullivan
Senior Planner
P.O. Box 7380
Bonney Lake, WA 98391-0944

or delivered to:

Jason Sullivan
Senior Planner
9002 Main Street East
Suite 300
Bonney Lake, WA 98391-0944

For more information, contact Jason Sullivan, Senior Planner by email at sullivanj@ci.bonney-lake.wa.us or by phone at (253) 447-4355.

2.2 RFP Timeline

Day/Date	Description
Wednesday, February 5, 2014	Advertisement announcing RFP placed in Bonney Lake Courier-Herald and Daily Journal of Commerce. RFP placed on City of Bonney Lake website. RFPs available to consultants via email notification and access to website.
Wednesday, February 14, 2014 By 4:30 p.m.	All questions due by this date.
Wednesday February 21, 2014	All pertinent questions posed by the above date will be answered and posted on the City's website as an Addendum.

Day/Date	Description
Friday, February 28, 2014 By 2:00 p.m.	RFP responses due to the Community Development Department located in the Justice and Municipal Building. <i>Respondents assume the risk of the method of dispatch chosen. The City assumes no responsibility for delays caused by any delivery service. Postmarking by the due date will not substitute for actual receipt of proposals. Proposals shall not be delivered by facsimile transmission or other telecommunication or electronic means.</i>
Tuesday, March 11, 2014	Responses will be analyzed by the evaluation team.
Week of March 17, 2014	A decision is made as to which consultant(s) will be finalist(s). All consultants will be notified of the City's decision.
Week of March 17, 2014	(City Optional) Finalist(s)' references may be contacted at the City of Bonney Lake's discretion.
Week of March 17, 2014	(City Optional) Finalist(s) consultant presentations at the City of Bonney Lake's discretion.
Week of March 24, 2014	Award to apparent successful consultant is made subject to successful negotiation of terms and conditions. Notice of award to apparent successful consultant posted on website.
Week of March 24, 2014	Contract negotiations begin.

2.3 RFP Evaluation Criteria

An evaluation team will evaluate the RFP responses received from each consultant. Prior to the selection of the award to the apparent successful consultant, the City reserves the right to conduct on-site visits of any consultants' facilities and/or require any consultant to participate in a presentation to the evaluation team (and others).

If an award is made as a result of this RFP, it shall be awarded to the consultant whose proposal is most advantageous to the City with price and other factors including, but not limited to, responses to the RFP questions; demonstrated technical ability and expertise; financial stability; reference calls and/or recommendations; memberships, licenses, ISO Certifications or any other applicable membership or certifications; presentations to the City evaluation team and others (if applicable); on-site visits at consultant's site (if applicable), product samples which the City may, at its discretion, request as part of the RFP process; any additional criteria deemed appropriate by the City which would lend itself to establishing the consultant's viability to perform the work as outlined in this RFP.

When determining whether a consultant is responsible, or when evaluating a consultant's proposal, the following factors will be considered, any one of which will suffice to determine if a consultant is either not a responsible consultant or if the consultant's proposal is not the most advantageous to the City:

1. The ability, capacity and skill of the consultant to perform the contract or provide the service required.
2. The character, integrity, reputation, judgment, experience and efficiency of the consultant.
3. Whether the consultant can perform the contract within the time specified.
4. The quality of performance of previous public and private contracts or services, including, but not limited to, the consultant's failure to perform satisfactorily or complete any written contract. The City's termination for default of a previous contract with a consultant shall be deemed to be such a failure.
5. The previous and existing compliance by the consultant with laws relating to the contract or services.
6. Evidence of collusion with any other consultant, in which case colluding consultants will be restricted from submitting further bids on the subject project or future tenders.
7. The consultant is not qualified for the work or to the full extent of the RFP.
8. There is uncompleted work with the City or others, or an outstanding dispute on a previous or current contract that might hinder, negatively affect or prevent the prompt completion of the work bid upon.
9. The consultant failed to settle bills for labor or materials on past or current public or private contracts.
10. The consultant has been convicted of a crime arising from a previous public contract, excepting convictions that have been pardoned, expunged, or annulled.
11. The consultant has been convicted of a crime of moral turpitude or any felony, excepting convictions that have been pardoned, expunged or annulled, whether in this state, in any other state, by the United States, or in a foreign country, province or municipality. Consultants shall affirmatively disclose to the City all such convictions, especially of management personnel or the consultant as an entity, prior to notice of award or execution of a contract, whichever comes first. Failure to make such affirmative disclosure shall be grounds, in the City's sole option and discretion, for termination for default subsequent to award or execution of the contract.

12. More likely than not, the consultant will be unable, financially or otherwise, to perform the work.
13. At the time RFP award, the apparent successful consultant must obtain a City business license. Failure to do so will constitute a determination that the consultant is not responsive and may be disqualified.
14. Such other information as may be secured having a bearing on the decision to award the contract.
15. Any other reason deemed proper by the City.

2.4 Notices

Good Faith

This RFP has been compiled in good faith. The information contained within is selective and subject to the City's updating, expansion, revision and amendment.

Right to Cancel

The City reserves the right to change any aspect of, terminate, or delay this RFP, the RFP process and/or the program which is outlined within this RFP at any time, and notice shall be given in a timely manner thereafter.

Not an Award

Recipients of this RFP are advised that nothing stated herein, or any part thereof, or any communication during the evaluation and selection process, shall be construed as constituting, offering or awarding a contract, representation or agreement of any kind between the City and any other party, save for a formal written contract, properly executed by both parties.

Property of the City

Responses to this RFP will become the property of the City, and will form the basis of negotiations of an agreement between the City and the apparent successful consultant.

City not Liable for Costs

The City is not liable and will not be responsible for any costs incurred by any consultant(s) for the preparation and delivery of the RFP responses, nor will the City be liable for any costs incurred prior to the execution of an agreement, including but not limited to, presentations by RFP finalists to the City.

City's Expectations

During the review of this document, please note the City's emphasis on the expectations, qualities, and requirements necessary to be positioned as an RFP finalist and successful consultant.

Insurance

This section applies to any consultants who require a presence in the City of Bonney Lake to perform work as part of their proposal. The consultant shall procure and maintain for the duration of the agreement, insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees. Consultant shall obtain insurance of the types and limits described below:

Automobile Liability

Insurance covering all-owned, non-owned, hired and leased vehicles. Coverage shall be written on Insurance Services Office (ISO) form CA 00 01 or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage. Automobile Liability insurance with a minimum combined single limit for bodily injury and property damage of \$1,000,000 per accident.

Commercial General Liability

Insurance shall be written on ISO occurrence form CG 00 01 and shall cover liability arising from premises, operations, independent contractors and personal injury and advertising injury. The City shall be named as an insured under the Consultant/Contractor's Commercial General Liability insurance policy with respect to the work performed for the City. Commercial General Liability insurance shall be written with limits no less than \$1,000,000 each occurrence, \$2,000,000 general aggregate.

Workers' Compensation

Coverage as required by the Industrial Insurance laws of the State of Washington.

Waiver of Minor Administrative Irregularities

The City reserves the right, at its sole discretion, to waive minor administrative regularities contained in any proposal.

Single Response

A single response to the RFP may be deemed a failure of competition, and in the best interest of the City, the RFP may be cancelled.

Proposal Rejection; No Obligation to Buy

This solicitation does not commit the City of Bonney Lake to award a contract, to pay any cost incurred with the preparation of a proposal, or to procure or contract for services or supplies. The City of Bonney Lake reserve the right to accept or reject any or all proposals received in response to this request, to negotiate with and qualified source, or cancel in whole or part this proposal process if it is in the best interest of the City to do so. Subsequent to contract negotiations, prospective consultants may be required to submit revisions to their proposals. All proposers should note that any contract pursuant to this solicitation is dependent upon the recommendation of the City staff and the approval of the Bonney Lake City Council.

Right to Award

The City reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially with the most favorable terms the consultant can offer.

Withdrawal of Proposals

Consultants may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To accomplish this, a written request signed by an authorized representative of the consultant must be submitted to the RFP Coordinator. The consultant may submit another proposal at any time up to the proposal closing date and time.

Non-Endorsement

As a result of the selection of a consultant to supply products and/or services the City is neither endorsing nor suggesting that the consultant's product is the best or only solution. The consultant agrees to make no reference to the City in any literature, promotional material, brochures, sales presentation or the like without the express written consent of the City.

Proprietary Proposal Material

Any information contained in the proposal that is proprietary must be clearly designated. Marking the entire proposal as proprietary will be neither accepted nor honored. If a request is made to view a consultant's proposal, the City will comply according to the Open Public Records Act, Chapter 42.17 RCW. If any information is marked as proprietary in the proposal, such information will not be made available until the affected consultant has been given an opportunity to seek a court injunction against the requested disclosure.

Errors in Proposal

The City will not be liable for any errors in consultant proposals. Consultants will not be allowed to alter proposal documents after the deadline for proposal submission.

The City reserves the right to make corrections or amendments due to errors identified in proposals by the City or the consultant. This type of correction or amendment will only be allowed for such errors as typing, transposition or any other obvious error. Consultants are liable for all errors or omissions contained in their proposals.

If, after the opening and tabulation of proposals, a consultant claims error and requests to be relieved of award, s/he will be required to promptly present certified work sheets. The RFP Coordinator will review the work sheets and if the RFP Coordinator is convinced, by clear and convincing evidence, that an honest, mathematically excusable error or critical omission of costs has been made, the consultant may be relieved his/her proposal.

After opening and reading proposals, the City will check them for correctness of extensions of the prices per unit and the total price. If a discrepancy exists between a price per unit and the extended amount of any proposal item, the price per unit will control. The City will use the total of extensions, corrected where necessary.

Bid Bond

A bid bond is not required

Performance Bond

A performance bond is not required.

Payment Bond

A payment bond is not required.

Funding

Any contract entered into as a result of this RFP is contingent upon the continued funding by the City of Bonney Lake.

Terms of Payment

The City's terms of payment are Net 30. Payment will be made within thirty (30) days upon receipt of an undisputed invoice for goods and/or services that have been delivered and accepted. No down payment or advance payment of any kind will be made. Washington State law requires proof that the materials have been furnished, the services rendered or the labor performed as described before payment may be made. A consultant may submit an invoice for progress payments.

3. SCOPE OF WORK

3.1 Introduction

The City is seeking a qualified consultant to assist in updating the Economic Vitality Element. The work will identify the City's economic characteristics and the identify programs, tasks and activities required to implement the draft vision and goals statements of the Economic Vitality Element attached as Exhibit A.

3.2 Objectives

- Identify key opportunities to expand and diversify the City's economic base
- Prepare trend analysis of the City's economic strengths and weaknesses
- Prepare fiscal analysis and benefits of development
- Identify opportunities to maximize public revenues
- Identify constraints and opportunities for economic development, e.g. housing supply, limited developable land, infrastructure capacity, redevelopment and financing constraints and potential land value changes
- Prepare strategic action plan to guide implementation

3.3 Phase 1 – Economic Development Economic Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

The consultant will prepare a SWOT Analysis identifying the internal and external factors that favorably and unfavorably influence economic development in the City. These factors include, but are not limited to, location, access, transportation and transit, housing, available land, infrastructure, public service capacity, and the surrounding trade market.

The City will provide the consultant with a summary of the local economy such the City's demographics (e.g. population, income, age, etc.) and employment (e.g. jobs-housing balance, number of establishments, employment by category, taxable sales, etc.). The City's Economic Profile will build upon existing documents, including but not limited to the existing Comprehensive Plan, the US Census, the State of Washington employment data, and the City's business license and revenue information.

Deliverable: Economic Development SWOT Analysis

3.4 Phase 2 – Economic Development Strategic Action Plan

Task 1: Economic Development Alternatives

This analysis will identify what should be done to address the items identified in the SWOT Analysis. The focus will be to establish specific alternatives for the retention and attraction of business, quality employment opportunities, and sustainable City revenues. The alternatives will be reviewed in conjunction with adopted City policies.

Deliverable: Economic Development Alternatives

Task 2: Economic Development Strategic Action Plan

Based upon the alternatives established in Phase II - Task 1, a strategic action plan will be prepared. Specific programs, activities, and tasks will be identified to implement the economic development alternatives.

Deliverable: Economic Development Strategic Action Plan

3.5 Phase 3 – Market Analysis Summary

Task 1: Retail and Non-Retail Sales Analysis

This task will first analyze the community-wide sales performance by major categories in order to better understand the market dynamics within the City and the surrounding trade area. The retail and non-retail taxable sales trends would be analyzed based on the City's taxable sales and business license databases. The potential effect of E-Commerce would be analyzed.

This task will also include a retail leakage analysis, i.e., which retail categories are losing competitiveness with other jurisdictions and possible strategies to diversify and gain competitive advantage. This analysis would utilize the information development in Phase I - Task 1 and provide projections for five (5), eight (8) and ten (10) mile radius from the City Center.

Deliverable: Retail and Non-Retail Sales Analysis

Task 2: Market Analysis

The purpose will be to first increase the understanding of the City's current economic structure and then to identify target economic opportunities that are both realistic and compatible. Existing and emerging industries will be identified and discussed in terms of

their potential to expand or grow within the City. This report will focus on four types of development: hotels, flex-office, warehousing/logistics, and light manufacturing.

Deliverable: Markey Analysis

4. ADDITIONAL INFORMATION

4.1 Single Point of Responsibility/Accountability

The City's expectation is to have a single point of contact, i.e. a single point of authority and a single contracting entity for this project. This is of a critical nature for this RFP; a contract will NOT be awarded to a consultant who does not have this single point of accountability. Indicate your understanding of and compliance with this requirement.

4.2 General Questions

1. How many years has your company been in business? How long have you been providing these services? What is your company's primary line of business?
2. Provide a brief overview of your company (furnish your business philosophy, mission statement, management structure, organization chart, etc.).
3. How many employees do you have? What is the total years' experience your employees have in this profession; what is the average?
4. State the type of ownership of your company. Give the State and date of your incorporation if applicable. List headquarters and regional / full-service office locations, and website address.
5. Provide the key contact name, title, address, telephone and fax numbers. Also identify the person(s) authorized to contractually bind the organization. Provide resumes for owners and personnel intended to serve on the project team.
6. Please provide status of any current or pending litigation against your company that might affect your ability to deliver the services that you offer.
7. Do you anticipate that your company will be acquired in the foreseeable future? Is your company planning to acquire any other companies? If yes, please provide the names of the companies and the nature of the business.
8. Include names of three (3) current or former customers (title, phone numbers and email addresses) that have had a scope of work similar to that described in this RFP and a letter of recommendation from each.

4.3 Scope of Work Questions

1. Provide a brief narrative of your experience preparing economic development profiles and economic development strategic action plans.
2. Indicate availability for the project including your available start date and any conditions that restrict your availability to work on this project.

4.4 Summary

Explain in one page or less how your solution will differentiate you from other consultants and why we should choose you as our successful consultant. List the unique features that give you and/or your company a competitive edge in economic development research.

5. RFP RESPONSE SUBMITTAL CHECKLIST

All proposals must include the following information:

5.1 Primary Consultant Contact Information.

Provide a single point of contact.

5.2 Certification Regarding Debarment.

Consultant must certify prior to entering into any agreement with the City that they are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency. Further, consultant must certify that they have not within a three-year period prior to entering into any agreement with the partnership been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public or private agreement or transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, receiving stolen property, making false claims, or obstruction of justice.

5.3 Services and Pricing.

Provided itemized pricing, including sales tax, for services listed in Section 3 – Scope of Services.

5.4 Evidence of insurance

Consultant must provide documentation demonstrating compliance with the minimum insurance coverage discussed in Section 2.5.

5.5 Answers to the questions

Provide written answers to all questions and/or inquires in Section 4 – Additional Information

This checklist is intended merely as an aid to the Consultant in providing a response to this RFP. The Consultant retains the sole responsibility for accuracy and completeness of the response.

Appendix A – Economic Vision and Goals

Vision Statement

Bonney Lake is an economically self-sustaining community that is the commercial center of the plateau by being competitive, resilient, and attractive to private and public investments. Retention of existing businesses and development of new businesses is actively supported in order to create robust commercial districts attractive to residents and visitors. This economic vitality promotes jobs, balances growth with the preservation of the City's scenic resources, enables residents to enjoy a high quality of life, and sets the standard for long-term economic sustainability.

Goals

- Establish a climate that stimulates economic activity and creates opportunities for businesses to launch and thrive.
- Encourage desirable investment that will grow and diversify the City's economy and employment base.
- Retain existing businesses and support the development of new business by creating a predictable and consistent regulatory environment.
- Implement the Downtown, Mid-town, and Easttown Subarea Plans to ensure a balanced mix of jobs businesses.
- Brand Bonney Lake's natural setting as a gateway to recreational destinations.
- Capitalize on Bonney Lake's scenic resources will respecting the environment.
- Strengthen Bonney Lake's image as a regional retail and commercial destination.
- Provide well planned, maintained, and high quality public infrastructure that supports business and community growth.