Overview

The Community Planning Association of Southwest Idaho (COMPASS) is seeking proposals from firms to conduct a community-level analysis and prepare a fiscal impact tool (“fiscal tool”). The analysis will estimate public revenues and expenditures associated with land use decisions by different cities and counties within the Treasure Valley (see “Study Area” below).

Fiscal impacts considered should include transportation, public education (K-12), public safety and emergency services, public works, parks and recreation, and other public service providers. The fiscal tool should provide objective results of typical land use decisions such as future land use maps and revisions, annexations, rezones, and subdivision approvals. COMPASS expects the community-level fiscal impact tool to be developed in two main phases: fiscal impact analysis and development of a fiscal impact tool. However, proposals that provide an alternative means of accomplishing the project purpose, while remaining within the established timeline and budget, are welcome.

Previously, a regional fiscal impact analysis and tool was developed for this area to compare various regional transportation and land use scenarios in preparation for the long-range transportation plan, Communities in Motion 2050. This community-level analysis and tool should build upon the previous work.

Study Area

COMPASS serves as the metropolitan planning organization for southwest Idaho’s Treasure Valley - the most populous area in the state. Rapid population growth experienced over the past two decades and the demand for infrastructure and services to keep up with new growth have created a burden for local communities.

The Treasure Valley encompasses two counties and 14 cities, ranging from the very small (less than 1,000 population) to the three largest cities in the state, all over 100,000 population. Cities vary widely in the types and level of services provided to their citizenry, from those that provide many services to those that provide few.
Community Fiscal Impact Analysis and Tool

COMPASS seeks a fiscal tool to provide critical information to leadership, stakeholders, and the public for evaluating the financial impacts of community growth.

The analysis phase should build upon existing data and gather additional, relevant financial data and assumptions from the cities, counties, highway districts, school districts, and other local public agencies. The analysis phase needs to coordinate efforts with local stakeholders to identify geographic areas and subareas to reflect community characteristics and infrastructure or service area plans, land uses that reflect existing and planned development, level of service thresholds for public service and infrastructure, and existing service level deficiencies. The consultant will work with local government agencies to determine the public service demands and revenues of different land uses. This analysis will be the foundation for the fiscal tool. The analysis should be based on marginal costs whenever possible.

The fiscal tool development phase will result in a calculator that COMPASS and its member agencies can use to evaluate the impact of land use decisions using the data gathered in the “analysis” phase.

Proposals

The budget for the regional fiscal impact analysis and fiscal tool is $175,000. Interested firms must demonstrate knowledge and experience in fiscal impact analysis, proforma valuation, property tax policies, and computer programming. The analysis phase, fiscal tool, and all deliverables must be complete no later than June 30, 2021. Proposals will be evaluated based on their ability to meet the qualifications and selection criteria.

Proposals must be prepared and submitted in accordance to the guidelines and requirements outlined in this Request for Proposals (RFP).

Proposed Project Framework

Oversight. COMPASS is responsible for this study. Representatives of the COMPASS Regional Transportation Advisory Committee (RTAC) and Public Participation Workgroup (PPW) will act as the steering committee for this effort, as deemed appropriate by the project manager.

Deliverables (See Attachment 1 for more information)

1. Final workplan, including schedule and milestones.
2. Stakeholder workshop(s) to identify geographic subareas, land use “prototypes”, cost of capital and operating expenses, level of service thresholds, and existing deficiencies.
3. Data inventory status report that identifies the various available public service demands and revenues for potential inclusion in the fiscal tool.
4. Data analysis status report that identifies the various public service demands and revenues of various land uses based on the city and county, other assumptions, and the proposed methodology.
5. Fiscal tool used to evaluate the fiscal impact of community land use plans and decisions.

6. Presentation to the COMPASS RTAC and the COMPASS Board of Directors to demonstrate the uses, inputs, and outputs of the tool.

7. Final report, tool, and data.

**Submittal Requirements**

Minimum components of a responsive submittal:

1. Cover letter with a brief narrative describing:
   a. Respondent’s understanding of the project, and
   b. Project manager and/or point of contact for the team.

2. A brief description of the:
   a. firm(s) that constitute the team.
   b. qualifications of team members who would be performing the work, their roles, and their relevant experience – key members of the team are to be noted. Principals of the involved firm(s) may be listed, but only in the context of their anticipated level of involvement in the project.

3. A list of relevant project-specific references, and the team members’ role in these projects, including a brief description of the services provided and client contact information. Only completed projects should be included.

4. A summary description of the fiscal impact development process, including:
   a. the approach for reaching out to stakeholders, prioritizing input factors, receiving required data, determining levels of service and deficiencies, and interpolating missing data, if necessary.
   b. how transportation and public utilities will be included in the fiscal impact analysis and tool.
   c. A description of when average costing versus marginal costing will be used.

5. A summary of the fiscal impact tool, including:
   a. The various business use cases and how various land use decisions can be supported by data from the tool.
   b. The functionality, maintenance, and limitations of the fiscal tool.

6. Please include:
   i. Budget. Task-level, line items for the major sub-tasks.
   ii. Schedule of tasks for the duration of the project. The project should anticipate beginning in July 2020 and completion shall be no later than June 30, 2021.
   iii. Statement that all firms included on the team are not barred from federal contracts.
iv. A statement that the sample Professional Services Agreement (sample attached as Attachment 1) has been read, that the proposer will meet the prerequisite insurance requirements, and the proposer, if selected, agrees to the terms and conditions of the agreement.

7. Disadvantaged Business Enterprise (DBE) status (including subcontractors), including name of certifying agency and contact person. Respondents are encouraged to include DBE firms on their teams. The Idaho Transportation Department maintains a list of firms at https://itd.dbesystem.com/?TN=itd.

In addition to the above list, respondents are advised of the following requirements and guidelines:

1. Responses - 15 pages maximum:
   a. Report cover and table of contents (not subject to page limit)
   b. Cover letter
   c. Project team, consultant qualifications, and experience
   d. Work plan and schedule
   e. Budget. Labor hours and cost per task (not subject to page limit)

2. Submit one (1) PDF file of the complete submittal via email to mlarsen@compassidaho.org

3. Responses must be received before 5:00 pm MDT on Monday July 6, 2020.

Selection Criteria
A selection committee comprised of COMPASS staff and members of the COMPASS RTAC and PPW will evaluate responses to this RFP.

Submitted proposals will be evaluated using the following key criteria:

- Demonstrated ability to deliver high quality, innovative work
- Ability to coordinate stakeholder communication to receive relevant data and establish service level thresholds
- Consultant experience with real estate development analysis, proformas, and economic analysis relevant to the Treasure Valley
- Ability to write and deliver clear and concise written reports and organized and intuitive proforma templates
- Ability to program fiscal impact tool(s) for ease of use and ability for COMPASS, and member agencies to update data as needed
- Completeness and clarity of proposal, and
- References

After selection of the most qualified firm, COMPASS will negotiate a final fee for the project based on a detailed scope of service developed by COMPASS and the selected consultant. If COMPASS and that firm are unable to negotiate a contract, negotiations will be terminated with that firm and the next most qualified firm will be selected until a contract has been negotiated with a qualified firm.
COMPASS may require a phone or video interview the week of July 20, 2020.

Selection Criteria
Responses will be scored as follows

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Maximum Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Demonstrated ability to deliver high quality, innovative work</td>
<td>25</td>
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<tr>
<td>B. Ability to coordinate stakeholder communication to receive relevant data and establish service level thresholds</td>
<td>20</td>
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<tr>
<td>C. Consultant experience with real estate development analysis, proformas, and economic analysis relevant to the Treasure Valley</td>
<td>15</td>
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<tr>
<td>D. Ability to write and deliver clear and concise written reports and organized and intuitive proforma templates</td>
<td>10</td>
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<tr>
<td>E. Ability to program fiscal impact tool(s) for ease of use and ability for COMPASS to update data as needed</td>
<td>10</td>
</tr>
<tr>
<td>F. Completeness and clarity of proposal</td>
<td>10</td>
</tr>
<tr>
<td>G. References</td>
<td>5</td>
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<tr>
<td>H. Cost</td>
<td>5</td>
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**Total Points Possible**: **100**

Schedule
COMPASS will be using an RFP process to select a consultant. Interested parties are encouraged to submit questions pertaining to this RFP via e-mail through **Monday, June 22, 2020**. The proposed schedule is as follows:

<table>
<thead>
<tr>
<th>Date</th>
<th>Schedule Milestone</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 12, 2020</td>
<td>RFP Release and Published Notice</td>
<td>COMPASS</td>
</tr>
<tr>
<td>June 22, 2020</td>
<td>Question Submittal Closes</td>
<td>Consultant</td>
</tr>
<tr>
<td>June 25, 2020</td>
<td>Response to Questions Posted to COMPASS Website</td>
<td>COMPASS</td>
</tr>
<tr>
<td><strong>July 6, 2020</strong></td>
<td><strong>5:00 PM MDT</strong></td>
<td><strong>Proposal Deadline</strong></td>
</tr>
<tr>
<td>By July 31, 2020</td>
<td>Consultant Selection/Notice to Proceed</td>
<td>COMPASS</td>
</tr>
<tr>
<td>By May 12, 2021</td>
<td>Draft Report</td>
<td>Consultant</td>
</tr>
<tr>
<td>By May 31, 2021</td>
<td>Presentation to the COMPASS RTAC</td>
<td>Consultant</td>
</tr>
<tr>
<td>By June 18, 2021</td>
<td>Review of Final Report</td>
<td>COMPASS</td>
</tr>
<tr>
<td>By June 30, 2021</td>
<td>Presentation to the COMPASS Board of Directors</td>
<td>Consultant</td>
</tr>
<tr>
<td>By June 30, 2021</td>
<td>Delivery of final report, tool(s), and data</td>
<td>Consultant</td>
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In addition to the above, respondents are advised of the following:

- DBE firms and non-profit entities are encouraged to respond.
- A panel comprising COMPASS’ RTAC and PPW will be used to review materials during this selection process.
- COMPASS reserves the right to request additional information from a respondent.
- COMPASS reserves the right to reject any and all responses and waive any irregularities. Issuance of this RFP does not constitute a commitment to proceed to a guaranteed contract.
- Questions and communication regarding the project described in the RFP will be directed solely to Meg Larsen, Director of Operations:
  - No phone calls or oral questions will be accepted.
  - Questions on this project must be submitted via email to mlarsen@compassidaho.org and will be accepted until June 22, 2020.
- Firms that may be interested in submitting a response are strongly encouraged to submit their contact information upon receipt of the RFP to be sure they receive relevant updates, if any, to the RFP.
- Responses to questions and additional information will be posted on the COMPASS RFP/RFQ webpage:
  - [http://www.compassidaho.org/people/jobs.htm](http://www.compassidaho.org/people/jobs.htm)

Additional Information
An example of COMPASS’ standard Professional Service Agreement (PSA) is attached for your information as Attachment 1.