



# CITY OF PLANO COUNCIL AGENDA ITEM

<b>CITY SECRETARY'S USE ONLY</b>				
<input type="checkbox"/> Consent <input type="checkbox"/> Regular <input type="checkbox"/> Statutory				
Council Meeting Date:		8/26/13		
Department:		Planning		
Department Head		Phyllis Jarrell		
Agenda Coordinator (include phone #): <b>Michael Parrish x7554</b>				
<b>CAPTION</b>				
RFP No. 2013-259-B for consulting services for Strategic and Operational Plan for Residential Property Value Retention for the Planning Department to Catalyst Commercial, Inc. in the amount of \$134,488, and authorizing the City Manager to execute all necessary documents.				
<b>FINANCIAL SUMMARY</b>				
<input type="checkbox"/> NOT APPLICABLE <input checked="" type="checkbox"/> OPERATING EXPENSE <input type="checkbox"/> REVENUE <input type="checkbox"/> CIP				
FISCAL YEAR:	<b>2012-13</b>	<b>Prior Year (CIP Only)</b>	<b>Current Year</b>	<b>Future Years</b>
				<b>TOTALS</b>
Budget		0	500,000	0
Encumbered/Expended Amount		0	-2,500	0
This Item		0	-134,488	0
BALANCE		0	363,012	0
<b>FUND(s):    GENERAL FUND</b>				
<b>COMMENTS:</b> This item, in the amount of \$134,488 will leave a current year balance of \$363,012 that may be used or carried forward into FY 2013-14 towards Neighborhood Reinvestment objectives.				
<b>STRATEGIC PLAN GOAL:</b> Working with a consulting firm to retain property values within Plano relates to the Council's Goals of Great Neighborhoods - 1st Choice to Live and Financially Strong City with Service Excellence.				
<b>SUMMARY OF ITEM</b>				
Staff recommends the proposal from Catalyst Commercial, Inc. in the amount of \$134,487.91 be accepted as the best value proposal conditioned on timely execution of necessary contract documents for consulting services for Strategic and Operational Plan for Residential Property Value. These services are needed by the Planning Department to conduct a comprehensive review of City services to residential areas.				
List of Supporting Documents:			Other Departments, Boards, Commissions or Agencies	
Memorandum, RFP Recap				

**Date:** August 9, 2013

**To:** Diane Palmer-Boeck, Chief Purchasing Officer

**From:** Christina Day, Community Services Manager

**Subject:** Award to Consultant for RFP 2013-259-B for Strategic and Operational Plan for Residential Property Value Retention

It is the recommendation of the City to award 2013-259-B for Strategic and Operational Plan for Residential Property Value Retention to Catalyst Commercial Inc. in the estimated amount of \$134,488 as follows:

Refining detailed scope of work and initial stakeholder interviews	\$16,450
Best practices analysis, neighborhood assessment, and development of Neighborhood Strategic and Operational Plan	\$93,399
Review of need for single family rental inspections	\$24,639

The contract is for an estimated six-months of professional services.

The Committee reviewed proposals from both of the submitting vendors. Catalyst Commercial Inc. was selected as our top candidate based on both the best value and best overall scoring matrix. Taken into consideration were each vendor's pricing, project approach, past experience, and personnel qualifications. Each committee member rated the firms independently without reviewing the cost of the service. The final scores were discussed amongst the evaluation committee and a final overall score was given to each proposal. Based upon the overall scores, Catalyst Commercial Inc. scored the highest and was the lowest cost.

The professional services consultant will conduct a comprehensive review of City services to residential areas. The consultant will work closely with a multi-departmental team to conduct a comprehensive study resulting in a neighborhood and housing operational and strategic plan for the City. The study will:

1. Review the effectiveness of current analytical tools for measuring neighborhood health, including Neighborhood Enhancement Tool, Neighborhood Indicators, and others as may be identified by City departments.
  - o Recommend uses and strategies for maximizing the output of these resources within the context of the community and organization.
  - o Utilize these resources to develop an objective assessment of current and future housing needs.
2. Identify City services supporting neighborhood stability and improvement.
  - o Review current levels of service and determine if those service levels and structures are consistent with best practices, as established by at least eight communities that have successfully met the challenges of maintaining quality neighborhoods under similar circumstances. If not, make objective, defensible recommendations for improvement including any associated costs and potential sources of revenue.

- Consider gaps or overlaps in services. Note any efficiencies and their financial and organizational impact.
- 3. Make recommendations for maintenance of and/or modifications to our business practices to ensure Plano's best chance of success in avoiding neighborhood decline over at least the next ten years.
- 4. Analyze the impact of occupancy (tenant vs. owner) on the value and marketability of housing stock in Plano using primarily local data (can be supported by regional, state, or national trends). Identify any quantifiable safety and/or neighborhood stability concerns related to occupancy type including but not limited to neighborhoods comprised, mostly, of single family homes. Examine the necessity and possible affect that a single-family rental housing inspection program may have on addressing the identified safety and/or neighborhood concerns related to occupancy type in those neighborhoods. Does the impact vary based on length of occupancy as a tenant or owner property?
- 5. Consistent with findings in items 1-4 above, recommend an implementation approach for effective program(s) of housing reinvestment utilizing the neighborhood vitality funds based on community needs and best value.
  - Implementation plans should be detailed annually for three years of operations include program objectives; basic procedures; operational requirements including staffing, space, equipment, and budget; and define reasonable annual and/or monthly outcomes.
  - In future years, the recommended programs will likely need an on-going funding commitment in an amount to be determined later as the program is developed and initiated. Explore options for leveraging Neighborhood Vitality funds through public and private partnerships, with organizations such as the Federal Home Loan Bank or others, and alternative financing options, including but not limited to the creation of a Housing Finance Corporation. Provide options at different funding levels and projected outcomes. These funds are intended to be used primarily as an incentive for homeowners' reinvestment in Plano's moderately-priced housing, focusing on extending the life of the structure. Anticipated future needs should be included in the implementation plan.

The development of this plan is critical to ensuring the City is prepared to maintain vibrant and renewing neighborhoods consistent with the City Council's Strategic Plan. As part of the 2012-13 budget process, Council provided funds and directed staff to engage professional consultant services in order to undertake this study as noted above.

The recommendation of award on the overall weighted score is to Catalyst Commercial Inc.

# CITY OF PLANO

## RFP RECAP

RFP NO. 2013-259-B

### RFP FOR Strategic and Operational Plan for Residential Property Value Retention

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**RFP opening Date/Time:** June 12, 2013 at 1:00 PM

**Number of Vendors Notified:** 7770

**Vendors Submitting "No Bids":** 0

**Number of Proposals Submitted:** 2

Catalyst Commercial, Inc. \$134,487.91

HW Holdings, LLC d/b/a  
Metrostudy a Hanley Wood Company \$168,500.00

**Recommended Vendor(s):**

Catalyst Commercial, Inc. \$134,487.91

*Michael Parrish*

August 14, 2013

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Michael Parrish, Senior Buyer

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Date