AGREEMENT
FOR PROFESSIONAL CONSULTING SERVICES

THIS AGREEMENT, by and between the City of Joplin, Missouri, whose address is 602 S. Main Street, Joplin, Missouri 64801, hereinafter referred to as the "City" and UP Development Planning, LLC, whose address is 123 S Broad Street, Suite 2042, Philadelphia, Pennsylvania 19109, hereinafter referred to as the "Consultant" is for professional services.

WHEREAS, the City desires to retain a professional consulting firm to provide services to conduct a 2021 Comprehensive Housing Market Analysis for the City.

NOW, THEREFORE, WITNESSETH: That for and in consideration of the mutual covenants and promises between the parties hereto, the parties do hereby agree as follows:

ARTICLE I - SERVICES

The Consultant agrees to diligently perform in a professional and workmanlike manner, a Comprehensive Housing Market Analysis for the City of Joplin. The scope of the report will meet the requirements of the City, as outlined below, including, but not limited to, the following:

1. Describe the explicit methodology that will be used for determining all items listed in this scope of services. A description of any models or similar approaches upon which final recommendations will be made will be considered.

2. Quantify current housing market conditions for owner-occupied and rental market sectors, utilizing primary and secondary research methods including but not limited to: one-on-one interviews with primary sources (major employers, developers, builders, realtors, City staff), housing vacancies, wait lists, MLS data, prospect traffic levels, Census data, assessor's data, building permit data and other appropriate measures.

3. Develop population and household estimates & projections for each of the affected urban neighborhood or blockgroup. The results of other housing studies that were performed before and after the 2011 tornado will be provided by request. A comparative index of neighborhood health indicators to the extent of data available is encouraged.

4. Required to identify information on the number of units, rental rates, sale prices, accessibility, unit and home size, features and amenities of current housing stock. A substantial portion of the area's rental stock is non-conventional single-family conversion rental properties. Survey and analysis of non-conventional rental stock is strongly encouraged.

5. Determine reasonable rates of absorption for replacement housing programs including short-, mid-, and long-term housing demand estimates by income levels and price point of housing stock.

6. Identify the number of units that have been, or potentially will be, removed and not replaced.

7. Identify strategies, approaches, and recommendations for satisfying the identified housing needs.

8. Estimate the demand for rental and owned units based on income including recommendations on how which type of developments/programs can meet this demand.

9. Identify specific areas of the City to focus redevelopment and housing replacement efforts.

10. Identify general location (Census Block Group level detail at minimum) where new housing developments may be appropriate.

11. The Consultant shall provide professional quality deliverables in an electronic format, including the use of readable and useful charts, graphics and tables.

The above-mentioned Scope of Services shall also reference and require, at a minimum, the services proposed in attached January 17, 2021 Proposal: Comprehensive Housing Market Analysis Joplin, MO as submitted by Urban Partners and attached here to as Exhibit B.

ARTICLE II - AGREEMENT TIME

1. This Agreement becomes effective on the day and year last shown below. Work shall commence no later than one (1) week from the Agreement date, with the intent of completing the project within 139 days from this date, unless, with the agreement of both parties, additional time is determined necessary.

2. Both parties shall have the right to terminate this Agreement upon ten (10) days' prior written notice by Certified Mail, Return Receipt Requested, to the address mentioned above. Upon written termination, the obligation of the parties for further performance of the terms of this Agreement shall thereupon cease, but they shall not be relieved of the duty to perform their obligations up to the date of termination.

ARTICLE III - GENERAL CONDITIONS

The following requirements are applicable to all activities undertaken with HOME Investment Partnership (HOME) funds.

A. General Compliance

The Recipient agrees to comply with the requirements of Title 24 of the Code of Federal Regulations, Part 92 (the U.S. Housing and Urban Development regulations concerning HOME Investment Partnership Program (HOME)) including subpart H of these regulations, except that (1) the Recipient does not assume the recipient's environmental responsibilities described in 24 CFR 92.352 and (2) the Recipient does not assume the recipient's responsibility for initiating the review process under the provisions of 24 CFR Part 52. The Recipient also agrees to comply with all other applicable Federal, state and local laws, regulations, and policies governing the funds provided under this contract. The Recipient further agrees to utilize funds available under this Agreement to supplement rather than supplant funds otherwise available.

B. "Independent Contractor"

Nothing contained in this Agreement is intended to, or shall be construed in any manner, as creating or establishing the relationship of employer/employee between the parties. The Recipient shall at all times remain an "independent contractor" with respect to the services to be performed under this Agreement. The Grantee shall be exempt from payment of all Unemployment Compensation,

FICA, retirement, life and/or medical insurance and Workers' Compensation Insurance, as the Recipient is an independent contractor.

C. Hold Harmless

The Recipient shall hold harmless, defend and indemnify the Grantee from any and all claims, actions, suits, charges and judgments whatsoever that arise out of the Recipient's performance or nonperformance of the services or subject matter called for in this Agreement.

D. Workers' Compensation

The Recipient shall provide Workers' Compensation Insurance coverage for all of its employees involved in the performance of this Agreement.

E. Grantee Recognition

The Recipient shall insure recognition of the role of the Grantee in providing services through this Agreement. All activities, facilities and items utilized pursuant to this Agreement shall be prominently labeled as to funding source. In addition, the Recipient will include a reference to the support provided herein in all publications made possible with funds made available under this Agreement.

F. Amendments

The Grantee or Recipient may amend this Agreement at any time provided that such amendments make specific reference to this Agreement, and are executed in writing, signed by a duly authorized representative of each organization, and approved by the Grantee's governing body. Such amendments shall not invalidate this Agreement, nor relieve or release the Grantee or Recipient from its obligations under this Agreement.

The Grantee may, in its discretion, amend this Agreement to conform with Federal, state or local governmental guidelines, policies and available funding amounts, or for other reasons. If such amendments result in a change in the funding, the scope of services, or schedule of the activities to be undertaken as part of this Agreement, such modifications will be incorporated only by written amendment signed by both Grantee and Recipient.

G. Suspension or Termination

In accordance with 24 CFR 85.43, the Grantee may suspend or terminate this Agreement if the Recipient materially fails to comply with any terms of this Agreement, which include (but are not limited to), the following:

1. Failure to comply with any of the rules, regulations or provisions referred to herein, or such statutes, regulations, executive orders, and HUD guidelines, policies or directives as may become applicable at any time;
2. Failure, for any reason, of the Recipient to fulfill in a timely and proper manner its obligations under this Agreement;
3. Ineffective or improper use of funds provided under this Agreement; or
4. Submission by the Recipient to the Grantee reports that are incorrect or incomplete in any material respect.

In accordance with 24 CFR 85.44, this Agreement may also be terminated for convenience by either the Grantee or the Recipient, in whole or in part, by setting forth the reasons for such termination, the effective date, and, in the case of partial termination, the portion to be terminated. However, if in the case of a partial termination, the Grantee determines that the remaining portion of the award will not accomplish the purpose for which the award was made, the Grantee may terminate the award in its entirety.

H. The Consultant shall prosecute the work in a diligent manner.

I. This Agreement, including payment hereunder, shall not be sub-let, assigned or otherwise disposed of, except with the prior written consent of the City.

J. The Consultant warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Consultant, to solicit or secure this Agreement and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Consultant, any fee, commission, gift or contingent fee.

K. In performance of the work covered by this Agreement, the Consultant shall not discriminate against any worker because of race, creed, color, political affiliation, handicap or national origin.

L. Possession of working papers, project reports, and other materials produced in connection with this Agreement shall be retained by the Consultant for at least five years beyond the date on which this agreement is fulfilled or otherwise terminated. Consultant shall provide copies for City of such records upon request. Consultant understands and agrees that the City of Joplin is a public governmental body as defined under Chapter 610, RSMo., and as such, any records in the possession of the City or the Consultant with regard to this contract may be open to the public. Consultant understands and agrees that City shall not be liable for the release of any such records as required by law. Any use except for the specific purpose intended by this Agreement will be at the user's sole risk and without liability to Consultant. Consultant shall retain ownership in its databases, computer software and other proprietary property. Intellectual property developed, utilized, or modified in the performance of the services shall remain the property of Consultant to the extent provided by law.

M. City shall have the right to make changes within the general scope of Consultant's services, with an appropriate change in compensation, upon execution of a mutually acceptable amendment or change order signed by an authorized representative of City and the President or Vice President of Consultant.

ARTICLE IV - COSTS AND PAYMENTS

1. The City shall pay Consultant for completion of project for the professional fee of exactly:

$ 39,732.00 (Thirty Nine Thousand Seven Hundred Thirty Two dollars and zero cents)

2. The City reserves the right to exercise the option for a periodic update to the study according to the Consultant's proposal for the professional fee of exactly:

   $7,500.00 (Seven Thousand Five Hundred dollars and zero cents)

ARTICLE V – INVOICING AND PAYMENTS

1. The City shall pay the consultant as follows:

   a. The City shall make payment thirty (30) days after receipt of an invoice for work performed or materials supplied the previous month.

   b. With any invoice, the Consultant shall submit evidence satisfactory to the City that the goods or supplies have been delivered, or that the work has been completed. The billings shall include, if applicable, all charges for consultants, subcontractors, plans, equipment, models, renderings, travel, reproductions, postage and delivery, and all other expenses. There shall not be any markup for overhead, administration or profit for any of the above-listed services.

   c. If for any reason the City makes a payment under this Agreement in error, the City may recover the amount overpaid or, if applicable, may apply any overpayment to a future installment payment.

2. 2. All payment will be submitted to the address below:

   Accounts Receivable
   UP Development Planning, LLC
   123 S. Broad Street, Suite 2042
   Philadelphia, PA 19109

3. Identify the check as – 2021 Joplin Comprehensive Housing Study

4. Consultant's invoices are due upon completion of work.

ARTICLE VI – STANDARD OF PERFORMANCE

1. The Consultant shall exercise the same degree of care, skill, and diligence in performing the services as is ordinarily possessed and exercised by a member of the same profession, currently practicing, under similar circumstances. No other warranty, express or implied, is included in this Agreement or in any drawing, specification, report, opinion, or other instrument of service, in any form or media, produced in connection with the services.

2. Notwithstanding anything to the contrary herein, Consultant shall not be responsible for

the failure of any consultant, contractor, subcontractor, vendor or other Project participant, not under contract to CONSULTANT, to fulfill contractual responsibilities to Owner or to comply with federal, state or local laws, regulations, and codes.

ARTICLE VII - INDEMNIFICATION AND INSURANCE

1. The Consultant covenants and agrees to, and does hereby hold harmless and indemnify the City, its officers, agents and employees from and against any and all judgments for property loss or damage, and/or personal injury, including death, to any and all persons, of whatsoever kind or character, to the extent arising out of Consultant's negligence in the performance of services under this Agreement.

2. The Consultant shall maintain workers' compensation insurance as required by Missouri law, and shall maintain a policy of general liability insurance with combined limits of at least $1,000,000.00.

3. Consultant and City waive all rights against each other for damages covered by property insurance during and after the completion of the services.

ARTICLE VIII – GUARANTY OF FEDERAL WORK AUTHORIZATION PROGRAM

1. Consultant agrees that it is enrolled and participating in the Federal Work Authorization Program ("FWAP") that ensures that all employees or agents have the legal right to work in the United States, as defined in 8 U.S.C. 1324a (h) (3) and § RSMo 285.525, and that it will maintain this compliance for the entire duration of its contract with the City of Joplin.

2. Consultant agrees that it does not knowingly employee any unauthorized alien in connection with the contracted services with the City.

3. Consultant agrees to provide an Affidavit of Compliance stating that they are enrolled and participating in a FWAP, and that Consultant does not knowingly employee any unauthorized aliens in connection with the contracted services, upon execution of this Agreement. (Exhibit A)

4. Consultant agrees to hold harmless and indemnify the City for any liability due to Consultant's failure to maintain compliance with FWAP or for violations of the Missouri Unauthorized Alien Workers Act.

ARTICLE IX - MISCELLANEOUS

1. CHOICE OF LAW. This Agreement has been made, and its validity, performance and effect shall be determined, in accordance with the laws of the State of Missouri and venue for litigation between the parties shall be solely and exclusively in Jasper County, Missouri, or the

United States District Court for the Western District of Missouri.

2. HEADINGS. The headings of paragraphs in this Agreement are for convenience only. The headings form no part of this Agreement and shall not affect its interpretation.

3. ENTIRE AGREEMENT. This Agreement (including any Exhibits) contains the entire understanding of the parties with respect to the subject matter hereof. It may not be altered or amended except by an agreement in writing signed by both parties.

4. WAIVER OR BREACH. Waiver of any provision of this Agreement or breach of this Agreement shall not thereafter be deemed to be a consent by the waiving party to any further waiver, modification or breach by the other party, whether new or continuing, of the same or any other covenant, condition or provision of this Agreement. Failure by one of the parties to this Agreement to assert its rights for any breach of this Agreement shall not be deemed a waiver of such rights. Should City be required to institute legal action to enforce any of its rights set forth in this Agreement, then City shall be entitled to reimbursement for all reasonable attorneys' fees and costs incurred as determined by the Court in any such cause of action.

5. SEVERABILITY. If any of the provisions of this Agreement shall be construed to be invalid or illegal, the legality or validity of the other provisions of this Agreement shall not be affected thereby. Any illegal or invalid provision of this Agreement shall be severable and any other provisions shall remain in full force and effect.

This Agreement may also be terminated for convenience by either the City or the Consultant, in whole or in part, by setting forth the reasons for such termination, the effective date, and, in the case of partial termination, the portion to be terminated. However, if in the case of a partial termination, the City determines that the remaining portion of the award will not accomplish the purpose for which the award was made, the City may terminate the award in its entirety.

6. REPRESENTATIONS. The signatories hereto represent and warrant that they have read this Agreement, that they are fully authorized in the capacities shown, that they understand the terms of this Agreement, and that they are executing the same voluntarily and solely for the consideration described herein.

7. RIGHTS AND BENEFITS. Consultant's services will be performed solely for the benefit of the City and not for the benefit of any other persons or entities. Nothing in this agreement shall be construed to give any rights or benefits to anyone other than City and Consultant.

N. CERTIFICATES. In the event that City requests Consultant to execute any certificates or other documents, the proposed language of such certificates or documents shall be submitted to Consultant for review at least fifteen (15) days prior to the requested date of execution. Consultant shall not be required to execute any certificates or documents that in any way would, in Consultant's sole judgment: (a) increase Consultant's legal or contractual obligation or risks; (b) require knowledge, services or responsibilities beyond the scope of this

Agreement; or (c) result in Consultant having to certify, guarantee or warrant the existence of conditions whose existence Consultant cannot ascertain.

ARTICLE X - ENTIRE AGREEMENT

This agreement constitutes the entire agreement between the Consultant and the City for the use of funds received under this Agreement and it supersedes all prior or contemporaneous communications and proposals, whether electronic, oral, or written between the Grantee and the Sub recipient with respect to this Agreement.

This Agreement contains the complete and full understanding of the parties; it may be varied only by written amendment executed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date shown below.

FOR THE CONSULTANT

_____

Isaac Kwon
UP Development Planning, LLC
Principal

Date: _____

ATTEST:

_____

Name: _____

Title: _____

FOR THE CITY

_____

Troy Bolander,
Planning, Development & Neighborhood Services

Date: _____

ATTEST:

_____

Thomas Walters,
Planning, Development & Neighborhood Services

_____

Exhibit A

STATE OF _____)
) ss.
COUNTY OF _____)

AFFIDAVIT OF COMPLIANCE
(Missouri Unauthorized Alien Workers Act)

My name is _____(Insert Name) and I am the _____(Insert Title) of _____ (Insert Company Name). I hereby represent, affirm and certify to the City of Joplin that my company does not knowingly employ any person who is an unauthorized alien in connection with contracted services with the City. I further affirm that my company is actively enrolled and participating in a federal work authorization program with respect to all employees working in connection with the contract services provided to the City.

_____
Affiant

IN WITNESS WHEREOF, I have hereunto subscribed my name and affixed my official seal this _____ day of _____, 2021.

_____
Notary Public

My commission expires:

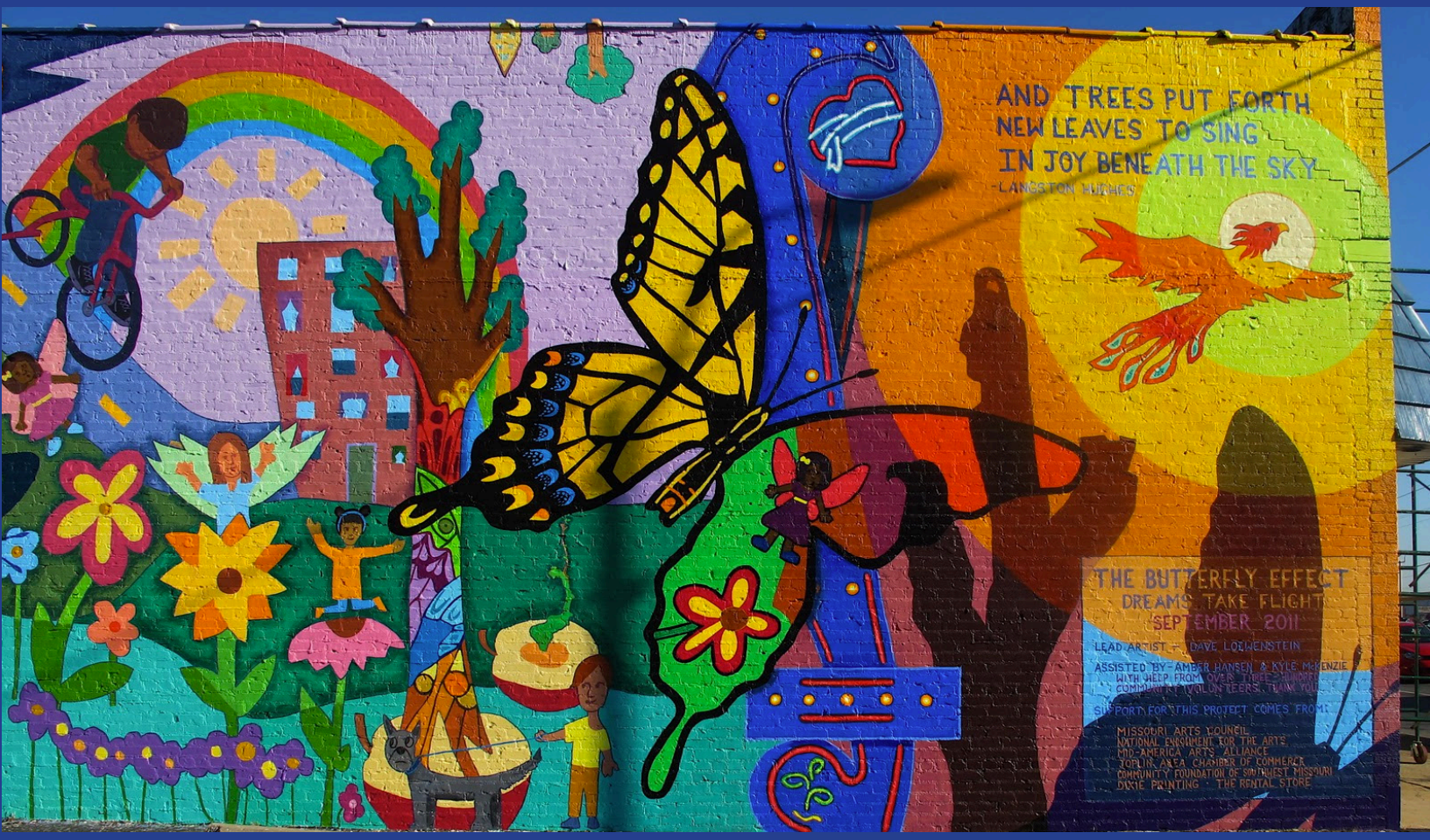
_____

Exhibit B

Proposal to Perform a Competitive Housing Market Analysis for Joplin, Missouri

CITY OF JOPLIN MISSOURI

Proposal: Comprehensive Housing Market Analysis
Joplin, MO



Proposed by:

URBAN PARTNERS

123 S. Broad Street, Suite 2042
Philadelphia, PA 19109
www.urbapartners.us
215-829-1901

February 8, 2021

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1.0 Cover Letter

Mr. Thomas Walters
Community Development Planner
Planning, Development & Neighborhood Services
City of Joplin
602 S. Main Street
Joplin, MO 64801

Re: Comprehensive Housing Market Analysis

Dear Mr. Walters:

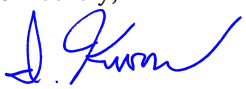
Urban Partners is pleased to submit the following proposal for the development of the Comprehensive Housing Market Analysis for the City of Joplin. Urban Partners is a Philadelphia-based community and economic development consulting practice with a 41-year track record of providing high quality services to our clients. The team members assembled for this project are leading national experts that have successfully completed numerous housing market analyses and planning initiatives in various communities that are similar in size and character as Joplin.

In the last decade, we've completed housing analyses for communities in Indiana (currently working in the City of Valparaiso), Ohio, Florida, Delaware, Kentucky, Georgia, Virginia, and Pennsylvania, and the desired outcomes of this project are very similar to the assignments recently completed by Urban Partners. But we are more than number crunchers—we also possess a wide range of planning, economic development, and real estate development experience, often bridging the gap between academic studies completed by public entities and the on-the-ground experience of the development community. Our team has the technical skills to assess and formulate strategies to attract different types of residential development (e.g., workforce housing, market-rate, income-restricted affordable, age-restricted senior housing, and others).

We are responsive to a community's needs and priorities and we structure, prepare, and design plans and studies accordingly. We strive to produce documents that people will want to pick up and read—reports that inspire people, help them think about their community in new ways, motivate them to participate, get them excited about the future of their community, and that are positioned for implementation.

Please let me know if you have any questions about the Urban Partners team or our approach to this project. I can be reached directly at (215) 829-1901 or ikwon@urbanpartners.us and I look forward to speaking with you.

Sincerely,



Isaac Kwon
Principal
Urban Partners

2.0 Executive Summary

Our understanding of this assignment is that the City of Joplin wishes to complete a data-driven study to help inform decision makers, stakeholders and community leaders a basis for formulating housing priorities, policy alternatives, and intervention strategies. Having successfully completed housing market analyses and planning initiatives in numerous communities throughout the country, Urban Partners understands the challenges of sustaining a vibrant housing market in a community comprised of varying local conditions and diverse sets of housing stock.

Seminal questions that the Housing Market Analysis will address include:

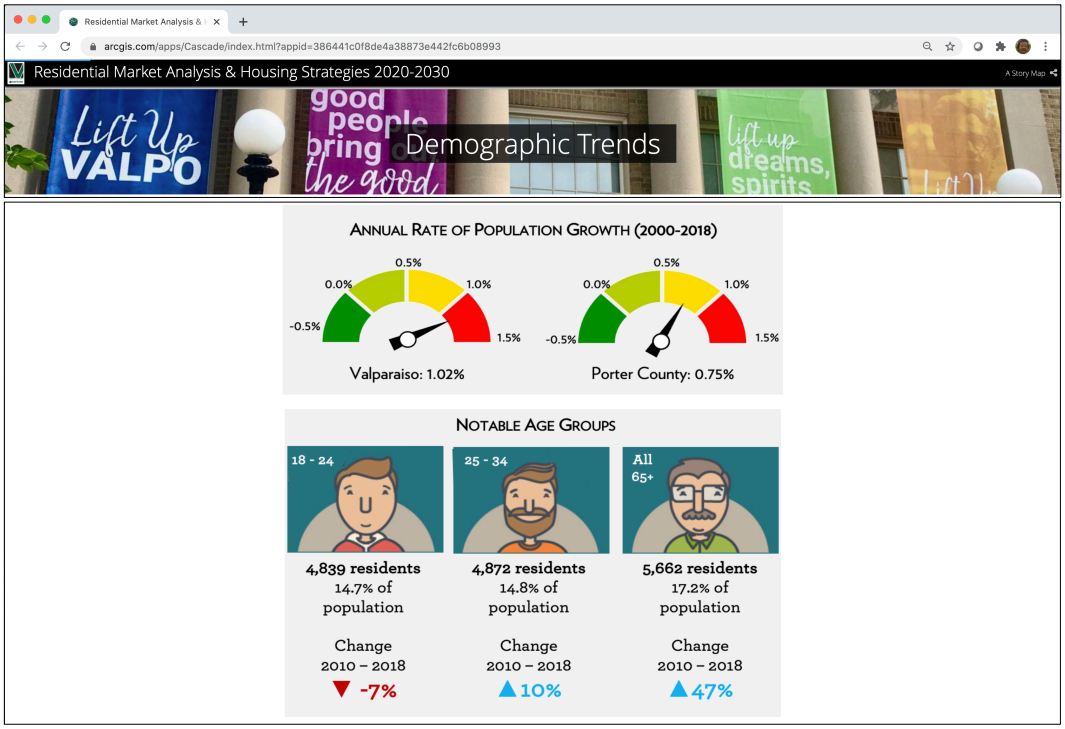
- What is the current status of post-tornado recovery of the housing stock, in terms of replacement of damaged homes and persistence of abandoned properties?
- Based on socio-demographic trends, as well as economic and population forecasts, what are Joplin's current and 20-year housing needs, broken into five-year increments?
- Based on the age and quality of current housing stock, what are cost-effective strategies to position established neighborhoods to compete with new construction in the local market? What strategies might be implemented to address identified deficiencies in the maintenance and repair of both owner-occupied and privately owned rental properties?
- Are there sufficient quantities of housing types that can support employers attract and recruit highly-qualified talent to the City?

Answering these questions based on real-time data and on-the-ground market conditions will provide an accurate snapshot of the City's housing market and help shape the policy discussions in the strategy recommendations portion. It is evident from the stated goals in the RFP that this study needs to go well beyond mere number crunching. We believe that it is absolutely crucial for the City of Joplin to hire a consultant team that has both the data management/analytical expertise as well as broad-based planning and economic development backgrounds from which we can skillfully craft the housing strategy recommendations. The Urban Partners team—

comprised of nationally regarded community/economic development specialists and housing market analysts—checks off all these boxes and will deliver high-quality results to the City of Joplin.

Distinguishing Characteristics of the Urban Partners Team:

- We have completed a vast array of market analysis and economic development strategies that go far beyond research and quantitative analysis—**our strategies serve as detailed blueprints for communities** to realistically consider their assets and opportunities for growth, to exploit their competitive advantages and to understand the required next steps involved in moving forward.
- We position our clients to **replicate our analytical methodology for future updates**. We do not assert trade secrets or proprietary techniques for housing market analyses. At the client's request, we can provide periodic updates of our analysis in a cost-effective manner.
- Each staff member mobilized for this study has decades of **public engagement experience,** often in under-resourced communities. We skillfully conduct public meetings and smaller focus groups; prepare resident surveys; and make presentations to council meetings, neighborhood groups, and housing/economic development entities.
- We pay careful attention in presenting technical information in ways that can be **easily understood by a diverse audience.** We believe that the Housing Market Analysis is first and foremost a public document, and therefore its "readability" should not be considered an afterthought. Urban Partners has also utilized project websites and *ESRI Story Maps* to present the report to the public.



ESRI Story Map prepared for the Valparaiso Residential Market Analysis & Housing Strategies (click link).

3.0 Company Background

Urban Partners is a national community and economic development consulting firm that assists public, private, and non-profit clients plan and implement feasible development and revitalization efforts. Since 1980, our attention to market and economic realities has helped clients complete an extensive portfolio of revitalization and development projects. Our work includes community-wide plans, district-based strategies, site specific assessments, and cultural/community facility feasibility. We provide sound real estate market analysis to identify the realm of alternatives and detailed fiscal/economic analysis to establish the long-term requirements of project development and sustainable operation.



Housing Market Analysis & Strategy

We prepare detailed analyses of housing markets that include supply and demand analysis, forecasting of future housing needs, incentive programs to provide unmet demand, and affordable housing needs analysis. Our work usually involves the engagement of community stakeholders in formulating housing priorities. We also assist specific housing developments in identifying target markets and planning production strategies.



Market Research/Feasibility Analysis

We create specialized economic development strategies for projects having complex development needs, including military bases, hospital complexes, and properties with significant environmental remediation needs. We undertake comprehensive studies, recommend viable development alternatives, identify economic/fiscal impacts of development schemes, and assist in securing developers and project financing.



Downtown & Commercial District Revitalization

We develop overall revitalization strategies for entire downtowns and commercial districts, create site-specific economic development strategies, and assist in the implementation of our recommendations. Our experience involves retail, office, residential, entertainment, lodging and cultural activities – as well as supportive uses such as parking, circulation, infrastructure and streetscape.



Community Planning & Municipal Assistance

We have a strong commitment to working with community development corporations, public agencies, and institutional partners on neighborhood revitalization issues. We create community master plans, identify specific projects, perform market and financial feasibility analysis, and structure the creative and workable financing strategies necessary to move complex urban development projects from conception to completion.



Cultural Heritage Economics

We assist cultural institutions, heritage areas, and recreational facilities in planning, financing, and implementing development projects and supportive programmatic activities that serve their mission and contribute to the tourism economy. We conduct economic impact analyses of cultural tourism activities that demonstrate the far-reaching impact of special exhibitions, festivals, and permanent arts, heritage and recreational programming on a region.



Smart Growth/Regional Planning

We are very active in transit-oriented development projects, cooperative regional planning efforts, and other smart growth initiatives that concentrate development in established urban areas, minimize sprawl development, and protect open space resources. Our services include policy tools such as transfer of development rights and other programs that facilitate implementation of sustainable development activities.

Staffing Plan

Each of the staff members featured below are available for the task hours required to complete this project in six (6) months assuming a start date of April 1, 2021.



Project Manager
Principal

- Isaac Kwon, Principal, will serve as Project Manager and will coordinate day-to-day activities of the project and be a point of contact for the City of Joplin. Isaac brings 20 years of experience in community/economic development and neighborhood-based planning. In the last several years, Isaac served as the project manager for most of the firm's recent housing market analyses, including the Citywide Comprehensive Housing Needs Study in St. Cloud, FL; Downtown Comprehensive Housing Needs Study in Cleveland, OH; Housing Demand Study in Lexington, KY; the Rental Housing Needs Assessment in Newark, DE; and numerous market analysis and economic development initiatives in Pennsylvania, New Jersey, Virginia, and Ohio.

  Prior to joining Urban Partners, Isaac served nearly a decade as a real estate developer for community-based development organizations in the City of Philadelphia. Isaac received his Bachelor of Arts degrees from the University of California, Los Angeles (UCLA) and is a graduate of the University of Pennsylvania with a master's degree in City and Regional Planning.



Supporting Staff
Principal

- Christopher A. Lankenau, AICP, Principal, will help manage this project and complete the analytical work alongside Isaac. Chris is an experienced city planner and economic development specialist having guided dozens of projects for the firm, including the Residential Market Analysis for the City of Valparaiso, IN (in progress). Other project management experience includes the Hagerstown City Center Plan, an economic development strategy for the East End of Pittsburgh, and a real estate market analysis/master plan for Downtown Erie. His current work focuses on community revitalization and economic development in both commercial and residential areas, including real estate market analysis, demographic analysis, and fiscal impact analysis, as well as economic feasibility analysis for adaptive use and new development projects. Chris also has experience in community outreach, transportation planning, and land use planning. Chris is a graduate of Michigan State University with a master's degree in Urban and Regional Planning.



Supporting Staff
Founding Partner

- James E. Hartling is a Founding Partner of Urban Partners and has served as partner-in-charge for most of the firm's downtown, neighborhood revitalization and economic development projects in Philadelphia, Hartford, Trenton, Camden, Pittsburgh, Baltimore, Cleveland, Miami, Newark and many other communities in the Mid-Atlantic and the Southeast. He has led the firm's efforts for the Hoboken, NJ Waterfront, the Piedmont Mall in Danville, VA; the Society Hill Sheraton Hotel and the Strawberry Square Shopping Center in Philadelphia. Jim served many years as a lecturer at the University of Pennsylvania, holds the position of

Vice Chairman of Entrepreneur Works, and serves on the advisory board of the Philadelphia Local Initiatives Support Corporation. Jim received his A.B. from Princeton University in Mathematics and his master's degree and predoctoral degree in planning from the University of California at Berkeley.

Please see **Appendix 1** for detail bios for each staff member shown above.

EXPERIENCED TEAM

The Urban Partners team members possess over 80 years of combined experience in stakeholder engagement working in communities with similar socio-economic characteristics as Joplin.

We provide multiple ways for residents and community stakeholders to learn about the project and provide valuable input.







4.0 Company Prior Experience

Relevant Experience & References

The following projects are similar housing study projects completed on-time and within the budget allocated by the Urban Partners team (see **Appendix 2** for detailed project sheets)

- Residential Market Analysis and Housing Strategy (Valparaiso, IN)
- Lexington Fayette County Housing Market Demand Study (Lexington, KY)
- Citywide Housing Study (St. Cloud, FL)
- Downtown Cleveland Housing Demand Analysis (Cleveland, OH)
- Rental Housing Needs Assessment (Newark, DE)
- PHFA Homeownership Choice Program Assessment (Harrisburg, PA)
- Mt. Washington 10-Year Housing Plan (Pittsburgh, PA)

Below is a list of references for work previously completed by Urban Partners:

1. **Beth Shrader**
   Director of Planning & Transit, City of Valparaiso
   (219) 462-1161 x 3331 • *bshrader@valpo.us*
   Project: **Residential Market Analysis and Housing Strategy** (in progress)

2. **Chris Woodall, AICP**
   Long Range Planning Manager
   Division of Planning, Lexington-Fayette Urban County Government
   (859)258-3231 • *cwoodall@lexingtonky.gov*
   Project: **Lexington-Fayette County Housing Demand Study**

3. **Michael Deemer**
   Executive Vice President, Downtown Cleveland Alliance
   (216) 736-7799 • *mdeemer@downtowncleveland.com*
   Project: **Downtown Cleveland Housing Study**

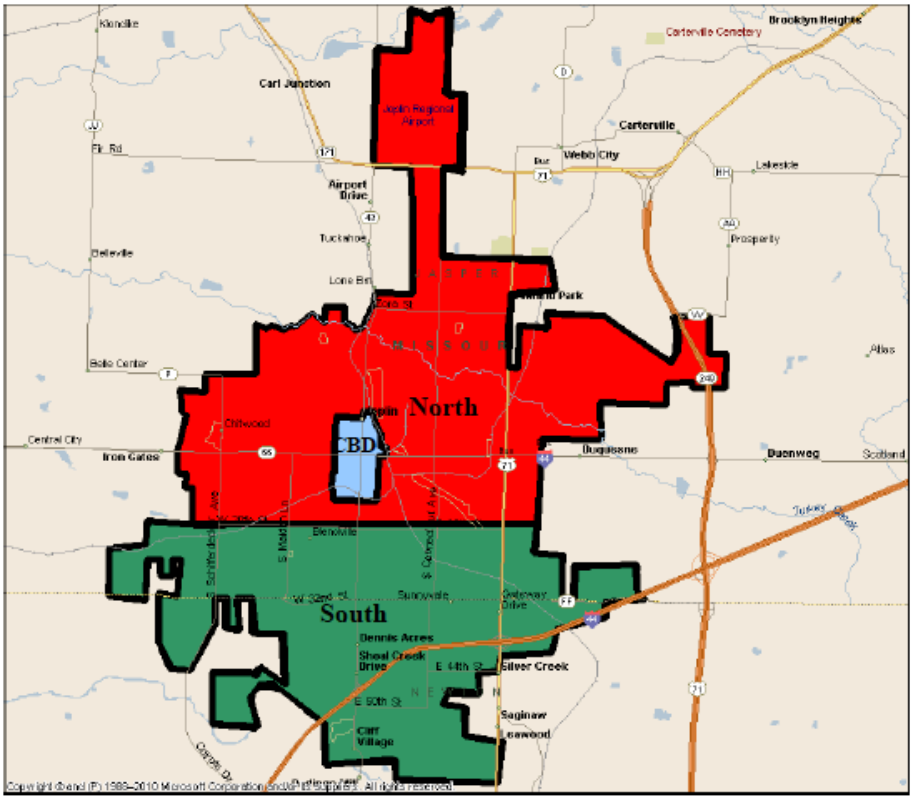
5.0 Scope of Services

Phase 1: Kick Off & Background Analysis

Task 1: Kick Off Meeting

We will hold a project initiation meeting with the Project Steering Committee convened by the City. The purpose of this meeting would be to: 1) confirm the project schedule for deliverables and meetings with the Project Steering Committee; 2) identify all pertinent data, documentation, and reports about the residential markets within Joplin; 3) identify key stakeholder interview list; 4) articulate individual and collective expectations; and 5) clarify issues of importance to Project Steering Committee members that should be considered in the execution of the project.

Defining the market Sub-Areas is another key discussion at this meeting. We will work with the City staff to finalize the Sub-Areas immediately following this meeting.



Potential Sub-Areas for the Housing Study

We will start with the subarea map from the previous study shown on the right and work with the City staff to adjust zone boundaries as necessary.

After establishing these Sub-Areas, we will ascertain and define a series of successively larger draw areas that are relevant in the context of the Study.

Task 2: Review Existing Plans and Documents

We will review previously completed comprehensive plans, neighborhood plans, market analyses, economic development and land use strategies to determine specific applicability to the current effort. Our review will identify pertinent information and their impact on this assignment.

Task 3: Demographic Trend Analysis

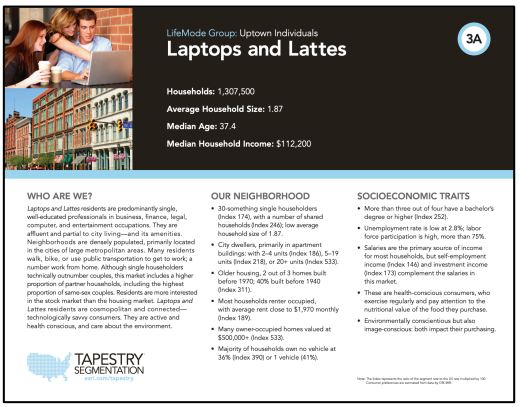
We will undertake a review and assessment of demographic trends and forecasts for the City. We will document regional, citywide, and Sub-Area-specific patterns in population, households, household composition, education, income/housing affordability, and housing occupancy/vacancy/tenure. The likely growth patterns will be analyzed based on population projections published by the Missouri Office of Administration, Division of Budget and Planning, and our own analysis of residential building permit data and future land use plans.

Additionally, we will purchase psychographic tapestry data from ESRI that will divide Joplin area consumers into sub-groups based on shared characteristics to explain and predict consumer behavior. This data will be helpful in identifying target groups and the depths of market demand for various types of housing.

ESRI Tapestry Segmentation

ESRI tapestry data is available for 14 "LifeMode" groups and additional segments in each LifeMode. Shown on the right are sample segment profiles in two of the LifeModes.





Task 4: Economic Trends Overview

We will examine current economic and business investment activity in the City, including emerging and/or declining industry sectors, migration and mobility characteristics, real estate pricing trends, etc. We will examine key employers, zones of concentrated jobs, and study the spatial mismatch of jobs and labor force that may currently exist. We anticipate that data sources for this analysis may include the U.S. Census Bureau (for Decennial Census, American Communities Survey, and Longitudinal Employer-Household Dynamics data), U.S. Bureau of Labor Statistics, Missouri Bureau of Labor Statistics, and any additional information provided by the City and members of the Project Steering Committee.

Task 5: Physical Conditions Analysis

We will conduct a physical conditions analysis for the housing stock in the City. We will use a combination of data sources and on-the-ground observations to determine areas of concern for blight and physical deterioration. Crucial to our analysis will be the City's code violation and blight determination records, along with a deep dive into the U.S. Census Bureau's vacancy reports.

According to the 2018 American Community Survey, 30% of Joplin's vacant properties are classified as "Other Vacant" which is inclusive of:

- Foreclosed properties.
- Units vacant due to the owners' preferences and/or personal situation (owner does not want to rent/sell, owner is staying with family, owner is in assisted living, etc.).
- Units vacant due to legal issues or disputes.
- Unoccupiable properties (abandoned/condemned).
- Units needing repairs before they can be sold or rented.
- Units used for storage of household furniture.

Additionally, the U.S. Department of Housing and Urban Development's Consolidated Housing Affordability Strategy (CHAS) dataset provides estimates of "housing problems" such as:

- Housing units that lack complete kitchen facilities
- Housing units that lack complete plumbing facilities

We will map these "other vacant" homes and units with "housing problems" at the Sub-Area levels and examine other relevant factors such as age of housing stock and median household income.

Task 6: Key Stakeholder Interviews

Using the contact information gathered from the Steering Committee, the Urban Partners team will conduct a series of interviews with Joplin real estate professionals and other key stakeholders—including civic organizations, major employers—to learn about their perspective on housing market and proposed initiatives or investments that could impact demand and employee retention efforts.

We are open to holding focus group meetings in groups of five or six persons, but we do not recommend large-format public meetings for this project. We are also amenable to gathering input from the general public with an online survey (we've successfully administered online residential preference surveys for numerous communities including Lexington, KY; St. Cloud, FL; Erie, PA; and Camden, NJ). A summary of comments will be produced upon the completion of the interviews.

Task 7: Steering Committee Meeting #2 (via Phone or Video Conference)

The Urban Partners team will facilitate a meeting with the Steering Committee to review the Existing Conditions Overview and to discuss the feedback received from stakeholders to date. To save time and costs for all parties involved, we propose to hold this meeting via phone or video conference.

Deliverables for Phase 1

- Summary of Existing Conditions and Preliminary Stakeholder Interview Results

***

Phase 2: Housing Market Profile

Task 8: Residential Market Analysis

Using the detailed parcel information provided by the City of Joplin, Urban Partners will perform a baseline analysis of all the residential units in the City by the following characteristics:

- Tenure
- Number of units in structure
- Year built
- Style/property class
- Size of living space, lot size
- Assessed value
- Last sale price/date
- Zoning designation
- Vacancy status

Rental Housing Market

Using a combination of census data and rental permit records that may be maintained by the City, we will perform a detailed analysis of the rental housing market for each of the Sub-Areas.

Rental Market Analysis Methodology:

1. *Develop a comprehensive inventory.*
2. *Perform detailed analysis of market segments by geography, including income-restricted homes.*

We will start with a comprehensive inventory of rental housing:

- Housing units by housing types (traditional multi-family, as well as non-conventional single-family rental conversions).
- Segmentation of rental housing into types:
  - Market rate units (i.e., non income-restricted, or subsidized), including homes in the workforce segment (affordable to households in the 80% to 120% of the Area Median Income)
  - Units restricted to low-to-moderate-income households (i.e., Low-Income Housing Tax Credit, HUD Multi-Family, Public Housing, Section 8 Vouchers).
  - Housing units designated for seniors at different levels of care.

Working with the inventory of rental homes, we will then complete the following:

- Analysis of market performance of all rental homes (asking rent, price per square foot, vacancy, features/amenities offered)

- Provide an analysis of the stock of assisted and market-rate affordable rental properties (also known as Naturally Occurring Affordable Housing, or NOAH) within the City.
- Provide an analysis of the distribution of current and planned affordable housing and identify geographic areas with a lack, or a concentration of, affordable housing, both assisted and unassisted (i.e., without subsidies).

Owner-Occupied Housing Market

Using the City property records as primary source of information, we will perform a detailed analysis of the owner-occupied housing market in each of the Sub-Areas.



For-Sale Market Analysis Methodology:

1. *Develop a comprehensive inventory.*
2. *Perform detailed analysis of sales transaction history by segment and geography.*
3. *Perform analysis of currently available homes for sale.*

We will start with a comprehensive inventory of owner-occupied housing:

- Housing units by housing types (single-family detached, single-family attached, and multi-family).
- Income-restricted home sales to low- and moderate-income households.
- Market-rate units affordable to low- and moderate-income households (also known as Naturally Occurring Affordable Housing, or NOAH).
- Housing units designated for seniors at different levels of care.

We will then complete the following transactional analysis for the for-sale market:

- Single-family and multi-family home sales (single-family detached, townhome, condominium, age-restricted, etc.).
- Number of sales per year and sub-market location.
- Median sale price and sale price per square foot.
- Foreclosures by location, observing any concentration by neighborhood.
- Average length on market based on Multiple Listing Service listing.
- Absorption rates, length of development for recently completed projects.
- Market locations that are under- and over-built.

Finally, we will complete the following analysis for the for-sale market:

- An analysis of for-sale units currently marketed, looking at current price point and geographic dispersion of sales by price point.
- An analysis of the new home market including data on housing types being built, sales by price point, inventory remaining in active subdivisions, and a price per square foot comparison of current offerings.

■ Task 9: Market Demand/Opportunities for Each Sub-Area

Before taking a deep-dive into market opportunities for each Sub-Area, we will determine the long-term growth prospects for the City of Joplin and Jasper and Newton Counties to consider the larger context in which housing demand in Joplin can be evaluated. Based on long-term projected growth for the City and the surrounding County/region—as well as national and local trends related to housing—we will determine the demand for housing for the City of Joplin for the next 20 years (detailed in five-year increments).

The following are important factors in determining the future housing demand:

- Population growth prospects for Jasper and Newton Counties and the Joplin MO Metropolitan Area.
- The likelihood of high-impact employers locating or expanding in the City of Joplin, particularly in the largest sectors of *Health Care & Social Assistance; Retail Trade;* and *Accommodation and Food Services.*
- The continued growth of work-from-home employment opportunities that may shift market demand toward communities with relatively low cost-of-living and high quality-of-life, including entertainment and outdoor recreation amenities.
- The changing age distribution, most importantly the growth of retired persons and the emergence of the Millennial Generation with vastly different housing preferences than previous cohorts.

Based on the above analysis, we will perform an evaluation of housing needs in the City of Joplin. This will include recommendations by housing type, size and location, and a discussion on which housing types are currently over-supplied/ undersupplied.

Example of Household Forecast

Detailed housing demand projection completed for the City of Valparaiso, 2020-2030.

	2020	2025	2030	Growth 2020-2030
All Households	**13,790**	**14,790**	**15,620**	**1,830**
15 to 34 Years	3,700	3,885	4,020	320
35 to 64 Years	6,600	6,730	6,970	370
65+ Years	3,490	4,175	4,630	1,140
All Owner-Occupied Housing	**8,020**	**8,650**	**9,175**	**1,155**
15 to 34 Years	1,065	1,120	1,160	95
35 to 64 Years	4,465	4,550	4,710	245
65+ Years	2,490	2,980	3,305	815
All Renter-Occupied Housing	**5,770**	**6,140**	**6,445**	**675**
15 to 34 Years	2,635	2,765	2,860	225
35 to 64 Years	2,135	2,180	2,260	125
65+ Years	1,000	1,195	1,325	325

Additionally, we will refer back to the ESRI Tapestry Segmentation data, as well as a deeper examination of the age of householder and tenure information for each of the Sub Areas, to produce a likely consumer/household profile. This analysis will provide a meaningful look into housing preferences for different types of homes (ownership vs rental, multi-family vs single-family, age restricted vs designed primarily for young working professionals, etc). We will also examine quality-of-life features such as shopping, dining, entertainment, and outdoor recreation offerings in each Sub-Area to the extent that they influence housing choice and market competitiveness.

We will summarize the capacity of the Sub-Area to absorb different types of housing at different price points for multiple household income ranges. We will provide an absorption forecast for a five-year period for each Sub-Area that quantifies segmentation by unit type and price point.

Task 10: Draft Housing Market Analysis Report

A compilation of analyses in Task 8 and Task 9 will be organized into a report form and delivered to the Project Steering Committee for review. As specified in the RFP, the report will detail the following draft recommendations:

- Reasonable rates of absorption for replacement housing programs including short-, mid-, and long-term housing demand estimates by income levels and price point of housing stock.
- Analysis of the lingering impact of the tornado damage; number of units that have been, or potentially will be, removed and not replaced.
- Estimate of the demand for rental and owned units based on income including recommendations on how which type of developments/programs can meet this demand.
- Specific areas of the City to focus redevelopment and housing replacement efforts.
- Identification of the general location (Census Block Group level detail at minimum) where new housing developments may be appropriate.

Additionally, we will produce a catalog of potential incentive programs and market intervention strategies to encourage the development of undersupplied housing. Working with the Steering Committee members and key stakeholders identified in Task 4, we anticipate the recommendations will address the following items:

- Range of strategies and programs to pursue for the development of necessary housing within the City, while maximizing the use of limited public funds.
- Increasing Joplin's suitability for market-rate housing that can attract and/or retain young working professionals and young families.
- Leveraging existing assets to spur new housing development, including transportation infrastructure, local talent pool, educational institutions and healthcare providers, tourism and recreational assets, etc.
- Strategies to address identified and perceived shortcomings of Joplin as it pertains to livability, marketability, and overall quality of life.

The report will be transmitted to the Committee Members electronically at least one week prior to the meeting.

Task 11: Steering Committee Meeting #3

The Urban Partners team will meet with the Project Steering Committee to review the Draft Housing Market Analysis Report prepared in Task 10. Feedback from the Steering Committee will be incorporated in the final version of the consolidated report.

Task 12: Final Report Preparation/Presentation

We will synthesize all deliverables into a single presentation of findings and recommendations at this stage. If desired by the City, we will prepare an easy to understand report/presentation for primary public release. In this version of the report, we will use infographics, graphs, illustrations, and maps to convey much of the detailed analyses, while laying out definitions of basic housing market terminologies for common basis of understanding.

Urban Partners will plan to make a video presentation via Zoom with the City's option to convene an in-person meeting for an additional fee.

Deliverables for Phase 2

- Housing Market Analysis Report

6.0 Sample Report Document

To demonstrate our team's range of analytical and writing skills, we are submitting for review the Residential Market Analysis for the City of Valparaiso, IN. Due to the length of the full report, we've attached the document at the very end of this proposal in Appendix 3.

7.0 Signature Page Form

Attachment A

THE CITY OF JOPLIN
REQUEST FOR PROPOSAL SUBMISSION FORM
RFP #

Company Urban Partners

Address 123 S. Broad Street, Suite 2042, Philadelphia, PA 19109

Contact Person Isaac Kwon

Telephone Number 215-829-1901

Email ikwon@urbanpartners.us

NOTE TO RESPONDENTS: SUBMIT ENTIRE SECTION WITH RESPONSE. THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE QUALIFICATIONS MAY RESULT IN REJECTION OF THE QUALIFICATIONS.
SIGNING A FALSE STATEMENT MAY VOID THE SUBMITTED QUALIFICATIONS OR ANY AGREEMENTS OR OTHER CONTRACTUAL ARRANGEMENTS, WHICH MAY RESULT FROM THE SUBMISSION OF RESPONDENT'S QUALIFICATIONS, AND THE RESPONDENT MAY BE REMOVED FROM ALL PROPOSER LISTS. A FALSE CERTIFICATION SHALL BE DEEMED A MATERIAL BREACH OF CONTRACT AND, AT THE JRC'S OPTION, MAY RESULT IN TERMINATION OF ANY RESULTING CONTRACT.

By signature hereon, Respondent acknowledges and agrees that (1) this RFP is a solicitation for Interest and is not a contract or an offer to contract; (2) the submission of Responses by Respondent in response to this RFP will not create a contract between the City and Respondent; (3) Neither the City or the Committee, or any of their representatives, have made a representation or warranty, written or oral, that one or more contracts with the City will be awarded under this RFP; and (4) Respondent shall bear, as its sole risk and responsibility, any cost which arises from Respondent's preparation of a response to this RFP.

By signature hereon, Respondent offers and agrees to furnish to the City all of the products and/or services more particularly described in its Responses, and to comply with all terms, conditions and requirements set forth in the RFP documents and contained herein.

By signature hereon, Respondent affirms that they have not given, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount,

trip, favor or service to a public servant, elected officials, leadership or staff of the City or partner organizations in connection with the submitted Responses.

By signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership or Developer represented by the Respondent, or anyone acting for such firm, corporation, or institution has violated the antitrust laws of this state, or the Federal antitrust laws, nor communicated directly or indirectly the Responses made to any competitor or any other person engaged in such line of business.

By signature hereon, Respondent represents and warrants that:
Respondent is a reputable company regularly engaged in providing products and/or services necessary to meet the terms, conditions and requirements of the RFP;
Respondent has the necessary experience, knowledge, abilities, skills, and resources to satisfactorily perform the terms, conditions and requirements of the RFP;

By signature hereon, Respondent certifies that the individual signing this document and the documents made part of the RFP is authorized to sign such documents on behalf of the company and to bind the company under any agreements or other contractual arrangements, which may result from the submission of the Response.

By signature hereon, Respondent affirms that no compensation has been received for participation in the preparation of the specifications for this RFP.

By signature hereon, Respondent affirms that it has not violated any of the noted No-Lobbying provisions or specification contained in this RFP.

By signature hereon, Respondent agrees to defend, indemnify, and hold harmless the City and the Committee, all of their officers, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages, and liabilities, arising out of, connected with, or resulting from any acts or omissions of Respondent or any agent, employee, subcontractor, or supplier of Respondent in the execution or performance of any agreements or other contractual arrangements which may result from the submission of these Responses.

Submitted and certified this 1st day of February.

BY:

Signature Date: February 1, 2021

Name (Printed): Isaac Kwon

Title: Principal

Signature: 

8.0 Proposal Cost Summary Form

The Urban Partners team cost proposal is based on this Staff / Task / Cost matrix that includes a breakdown of tasks, labor assignments and rates—with a not-to-exceed project cost of **$39,732**, with an optional fee of $7,500 for each update (at month 6 and month 12 after completing the initial study). The Proposal Cost Summary Form is attached on the following page.

	Task	Urban Partners		
		I. Kwon	C. Lankenau	J. Hartling
PHASE ONE: KICK OFF & BACKGROUND ANALYSIS				
1	Kick Off Meeting (Steering Committee MTG #1)	2	2	
2	Review Existing Plans and Documents	6		
3	Demographic Trend Analysis	8		
4	Economic Trends Overview	12	4	
5	Physical Conditions Analysis	12		
6	Key Stakeholder Interviews	12	8	
7	Steering Committee MTG #2 (via Phone/Video Conference)	4	2	
PHASE TWO: HOUSING MARKET PROFILE				
8	Residential Market Analysis			
	- Rental Market	2	24	
	- Owner-Occupied Market	24		
9	Market Demand/Opportunities for Each Sub-Area	20		8
10	Draft Housing Market Analysis Report	30	4	4
11	Steering Committee MTG #3	4	2	
12	Final Report Preparation/Presentation	20	4	
	Total Hours	156	50	12
	Hourly Rate	$172	$172	$225
	Labor Cost	$26,832	$8,600	$2,700
	Out-of-Pocket Expenses by Firm	$1,600		
	TOTAL LUMP SUM FEE (NOT TO EXCEED)	**$39,732**		

Attachment B

THE CITY OF JOPLIN
PROPOSAL COST SUMMARY FORM

The City is requesting two (2) prices. The first price is a lump sum price to create the initial market research analysis. The second price is a set fee to update the analysis at 6 months after the initial report and 1 year after the initial report. The second price should reflect a price per each update so that the City can determine whether or not to select one, both, or none of the update options. This decision to elect to have the initial study updated will be solely made by the City of Joplin. The City of Joplin does not guarantee that the contract will include any update options. Pricing is all-inclusive including all expenses (personnel, office rent, copy work, mileage, etc.). The City of Joplin will not pay any other expenses.

Description	Price
Lump sum price to create the initial market research analysis per the specifications provided in Section 4 (pages 5-6) of the Request for Proposal.	$ 39,732
Fee for Optional Update(s)	$ 7,500

Name of Company: Urban Partners

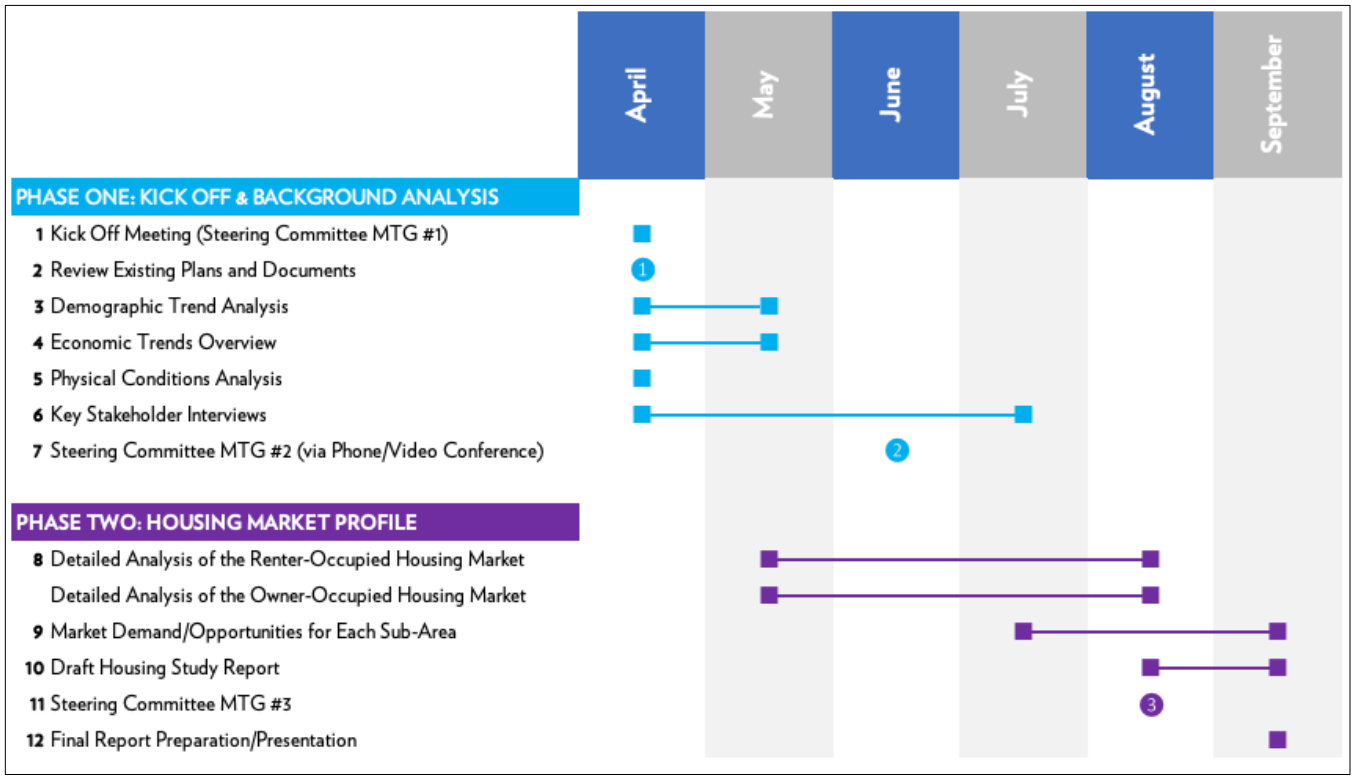
Name (Printed): Isaac Kwon

Signature: 

Date: February 1, 2021

PROPOSED SCHEDULE

The Urban Partners team is prepared to complete this assignment in a 6-month period. Shown below is our proposed schedule in relation to each phase based on the assumption that the project will kick off early-April. We estimate that a total of 218 task hours are necessary to complete this assignment. Based on the projection of our current commitments for the staff members proposed for this project, we have ample capacity to complete this assignment within 180 days and on-budget.



Work Schedule During COVID-19:

We believe that on-the-ground presence is an essential component of a successful market analysis project. Having said that, completing assignments during the COVID-19 pandemic era is presenting some unique challenges that are requiring flexibility on everyone's part.

While we anticipate that the majority of project tasks can proceed with no disruptions, COVID-19 will impact the execution of this study in two major ways: 1) in-person meetings and fieldwork may have to be delayed or switched to online format until social distancing orders are lifted; and 2) much of the housing market data during the pandemic (sale prices, home vacancies, rental rates, etc.) will be reflective of the temporary economic slowdown, not necessarily the stable market conditions. Working with the City, we will adjust our approach as necessary, monitoring local market conditions and COVID restrictions. We do not anticipate reaching post-COVID phase for housing market recovery until late 2021 at the earliest.

Appendix 1: Staff resumes

Attached are detailed resumes for Urban Partners team members.

- Isaac Kwon, Principal (Project Manager for this study)
- Chris Lankenau, AICP, Principal
- James Hartling, Founding Partner

Isaac Kwon

Principal



EDUCATION

University of Pennsylvania
Master's in City and Regional Planning

University of California, Los Angeles
Bachelor's in Geography
Bachelor's in Asian American Studies

MEMBERSHIPS & AFFILIATIONS

Calvary Center for Culture and Community, Board of Director

Community Design Collaborative, Volunteer Planner

CONTACT INFORMATION

123 S. Chestnut Street, Suite 2042
Philadelphia, PA 19109
(215) 829-1901
ikwon@urbanpartners.us
http://www.urbanpartners.us

Isaac Kwon is a community and economic development consultant with more than 20 years of experience working in urban communities throughout the nation. Since joining Urban Partners in 2008, Isaac has managed a wide array of economic development projects for the firm, including downtown and commercial district revitalization strategies, neighborhood master plans, market analysis and feasibility studies, and economic impact analyses. Isaac has managed most of the firm's recent housing market analyses, for various communities in Delaware, Florida, Georgia, Indiana, Kentucky, Ohio, Pennsylvania, South Carolina, and Virginia. Isaac possesses the experience and skillsets to assess and formulate strategies to attract different types of housing development (e.g., workforce housing, market-rate, income-restricted affordable, age-restricted senior housing, and others).

Prior to joining Urban Partners, Isaac served as the real estate development director for three different community development corporations in Philadelphia. He was responsible for all facets of real estate development—including site acquisition, financing, design oversight, construction management and marketing. Isaac possesses extensive experience in urban neighborhood development and in packaging a variety of local, state and federal financing sources.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Residential Market Analysis and Strategy Plans

- Residential Market Analysis (Valparaiso, IN)
- Fayette County Housing Demand Study (Lexington, KY)
- Citywide Housing Study (St. Cloud, FL)
- Housing Needs Assessment (Newark, DE)
- Downtown Cleveland Housing Study (Cleveland, OH)
- Housing Authority Portfolio Assessment (Richmond, VA)
- PA Housing Finance Agency Assessment (Harrisburg, PA)
- SW Philadelphia Affordable Housing Strategy (Philadelphia, PA)

Commercial District/Downtown Revitalization

- Route 301 Chesterfield Market Study (Chesterfield, VA)
- Buford Hwy Economic Development Plan (Brookhaven, GA)
- Poinsett Corridor Market Analysis (Greenville, SC)
- Downtown Hammonton Market Analysis (Hammonton, NJ)
- Downtown Westport Master Plan (Westport, CT)
- Lower Frankford EPA Area Wide Plan (Philadelphia, PA)
- 52nd Street Commercial District (Philadelphia, PA)
- Greystone Hospital Redevelopment Feasibility (Parsippany, NJ)

Christopher Lankenau, AICP

Principal



EDUCATION

Michigan State University
Master's in Urban and Regional Planning

University of Vermont
Bachelor's in Geography

MEMBERSHIPS & AFFILIATIONS

American Planning Association

American Institute of Certified Planners (AICP)

Fairmount Community Development Corporation - Vice President, Board of Directors

CONTACT INFORMATION

123 S. Chestnut Street, Suite 2042
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http://www.urbanpartners.us

Christopher Lankenau, AICP, is a planner and economic development consultant with 25 years of professional experience. Since joining Urban Partners in 2006, Chris has managed a variety of projects ranging in scale from single sites to large master plans on behalf of municipalities, community development corporations, and non-profit organizations in several states. His current work focuses on community revitalization and economic development in both commercial and residential areas, including real estate market analysis, demographic analysis, and fiscal impact analysis, as well as economic feasibility analysis for adaptive use and new development projects. Chris also has experience in community outreach, transportation planning, and land use planning.

Prior to joining Urban Partners, Chris was a Senior Associate at the Pennsylvania Economy League, where he focused on community revitalization in Southeastern Pennsylvania's older core communities. Chris also has significant planning experience as a consultant with the Philadelphia firm of Kise Straw & Kolodner (now KSK Architects, Planners and Historians), where he managed a variety of planning projects with a particular focus on commercial district and community revitalization. Previously, Chris also held staff positions with county planning agencies, serving as planner for the Montgomery County Planning Commission (PA), as well as the Maryland National Capital Park and Planning Commission.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Commercial District/Downtown Revitalization

- Rejuvenating Urban Centers (Dutchess County, NJ)
- Englewood Downtown Master Plan (Englewood, NJ)
- Souderton Business Improvement District Feasibility Plan (Souderton, PA)
- Downtown Glassboro Arts and Entertainment District Plan (Glassboro, NJ)
- Hagerstown City Center Plan (Hagerstown, MD)
- Trenton 250 Master Plan (Trenton, NJ)
- Downtown Boyertown Vision & Action Plan (Boyertown, PA)
- Martinsburg Mills & Rail Corridor Revitalization Initiative (Martinsburg, WV)
- Downtown Etna Commercial Revitalization Analysis (Etna, PA)

Market Research/Feasibility Analysis

- Market Analysis for Downtown Erie (Erie, PA)
- Garrett Williamson Foundation Master Plan (Newtown Square, PA)
- Johnstown Train Station Reuse Study (Johnstown, PA)
- New Granada Theater Reuse Plan (Pittsburgh, PA)

James E. Hartling

Partner



EDUCATION

University of California at Berkeley
Master's in City Planning

Princeton University
Bachelor's in Mathematics

MEMBERSHIPS & AFFILIATIONS

Entrepreneurworks - Chairman, Board of Directors

Local Initiatives Support Coalition (LISC) Philadelphia – Advisory Board

Community Design Collaborative, Advisory Board

CONTACT INFORMATION

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James Hartling has served as partner-in-charge for most of Urban Partners' economic development projects and has been responsible for examining the market feasibility of many large-scale development and redevelopment projects since the firm's inception in 1980. He has directed the firm's downtown revitalization efforts in numerous cities in the mid-Atlantic and East Coast, and has prepared and helped implement neighborhood housing and commercial revitalization strategies in both large cities and smaller communities. Additionally, he has directed the firm's work involving the planning and development of new village centers and transit-oriented developments, as well as significant participation in the establishment of transfer of development rights programs (TDR) in New Jersey and Pennsylvania. He has also completed numerous studies documenting the regional tax and employment impacts of major cultural institutions.

From 1977 to 1980, Jim administered $15 million annually of CDBG and EDA funds as Deputy Director for Economic Development of Philadelphia's Community Development program. Previously, Jim was on the faculty of the University of Texas teaching in both the graduate planning and public affairs programs. There he conducted research and training projects on economic and community development and human services delivery. He has also held staff positions with planning and development agencies in Texas, California, and New Jersey.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Downtown/Commercial District Revitalization

- Downtown Savannah Master Plan (Savannah, GA)
- Allentown Arts District Master Plan (Allentown, PA)
- Englewood Downtown Master Plan (Hagerstown, MD)
- Arts & Entertainment District Plan (Glassboro, NJ)
- Bridging the Busway Transit-Based Plan (Pittsburgh, PA)

Market Research/Feasibility Analysis

- Black Horse Pike Market Feasibility Study (Camden County, NJ)
- Buford Highway Improvement Plan (Brookhaven, GA)
- Poinsett Corridor Market Analysis/E.D. Plan (Greenville, SC)
- Union Township/Route 82 Corridor Study (Union Township, NJ)

Smart Growth/Transit Oriented Development

- Broad & Erie Community Development Plan (Philadelphia, PA)
- A Vision for Homewood and Point Breeze North (Pittsburgh, PA)
- Millbourne Station Area (Millbourne, PA)

Appendix 2: Relevant Project Sheets

The following are detailed project sheets of similar housing study projects completed on-time and within the budget allocated by the Urban Partners team.

- Residential Market Analysis and Housing Strategy (Valparaiso, IN)
- Lexington Fayette County Housing Market Demand Study (Lexington, KY)
- Citywide Housing Study (St. Cloud, FL)
- Downtown Cleveland Housing Demand Analysis (Cleveland, OH)
- Rental Housing Needs Assessment (Newark, DE)
- PHFA Homeownership Choice Program Assessment (Harrisburg, PA)
- Mt. Washington 10-Year Housing Plan (Pittsburgh, PA)

Project Profile:

Residential Market Analysis – Valparaiso, Indiana



The City of Valparaiso is located in Northwest Indiana, just one hour southeast of Chicago at the eastern edge of the metro area and approximately 15 miles south of Lake Michigan. Serving as the county seat of Porter County, Valparaiso is experiencing moderate and consistent growth particularly in the form of new residential subdivisions and infill housing developments. Valparaiso has a thriving and active downtown which is often noted as one of the community's greatest assets.

In 2019, the City retained Urban Partners to conduct a comprehensive residential market analysis. In addition to analyzing the supply-and-demand dynamics of Valparaiso's housing market, Urban Partners will assist the city formulate policies to address housing diversity, affordability, future land use, and improvements to overall quality of life for all residents of Valparaiso.

Location:
Valparaiso, IN

Client:
City of Valparaiso

Completion Date:
2020

Key services performed

- Housing Demand Analysis
- Population Forecasts
- Housing Policy Recommendation
- Stakeholder Engagement
- Public Presentation

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Project Profile:

Lexington Fayette County Housing Market Demand Study



Urban Partners has completed work on a Housing Market Demand Study for Fayette County, KY. We coordinated with a partnership of civic and private organizations, including the Fayette County Division of Planning, the Lexington Fayette County Property Valuation Administrator, the Lexington Downtown Development Authority, the Lexington Bluegrass Association of Realtors, the Building Industry Association of Central Kentucky, and the Fayette Alliance Foundation.

This study identified mid-term (10 year) housing demand in the county based upon recent building and sales patterns, existing housing stock, and demographic projections, while highlighting issues demanding special attention to ensure Lexington's housing market matches the needs of current and future residents. Working with the steering committee, Urban Partners quantified the incremental housing demand, segmented by housing typology and tenure. This study will help inform the City's future housing development strategy, which will consider factors involved in responding to the various components of demand described in the study.

Location:
Lexington, KY

Client:
Lexington Fayette Urban-County Government

Completion Date:
2017

Key services performed

- Housing Demand Analysis
- Population Forecasts
- Town-and-Gown Community Planning
- Housing Policy Recommendation
- Public Presentation

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Project Profile:

Citywide Housing Study

Location:
St. Cloud, FL

Client:
City of St. Cloud

Completion Date:
2019

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Strategically located in a rapidly growing county—and endowed with comparatively low cost vacant and developable land—the City of St. Cloud has grown exponentially in the past several decades. From 2000 to 2018, St. Cloud has added 33,000 new residents which is equivalent to a staggering 165% growth during that period.

Thus far, St. Cloud has grown as a bedroom community where most of its employed residents work elsewhere. Though this is not an atypical narrative for smaller cities, the residents of St. Cloud aspire for a livable, vibrant live-work-play community. The seminal questions for the Housing Study were:

- What are the housing needs for the city for the next 20 years based on projected and desired growth?
- What types of homes are needed (e.g., tenure, size, density, targeted age and household income, etc.)?
- How can these market opportunities be optimally matched up to the desired character of various neighborhoods?

The results of this study, which will be completed in the Summer of 2019, will provide the City of St. Cloud a meaningful sense of the housing market to formulate housing priorities and growth management strategies.

Key services performed

- Housing Demand Analysis
- Population Forecasts
- Housing Policy Recommendation
- Stakeholder Engagement
- Public Presentation



Project Profile:

Downtown Cleveland Housing Demand Analysis

Location:
Cleveland, OH

Client:
Downtown Cleveland Alliance

Completion Date:
2018

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Downtown Cleveland, after many decades of population loss, is currently undergoing a major renaissance supported by a robust housing market. In 2018, the Downtown Cleveland Alliance (DCA) retained Urban Partners to complete a Comprehensive Housing Demand Analysis for Downtown Cleveland (comprised of the Flats, Warehouse District, Gateway District, Playhouse Square, Nine-Twelve District, and Campus District) and the surrounding neighborhoods (including Detroit Shoreway, Ohio City, Tremont, Midtown, St. Clair Superior, and Central).

The results of this study, which was published in the fall of 2018 detailed future housing needs, as well as a recommended housing type mix, such as rental/homeownership, condos, townhomes, age restricted housing, income-restricted housing, etc. Additionally, Urban Partners recommended a set of goals that pertain to housing policy and potential toolkits to promote a healthy and balanced housing market that expands and preserves housing opportunities for all residents.

Key services performed

- Housing Demand Analysis
- Population Forecasts
- Economic Trend Analysis
- Housing Policy Recommendation
- Stakeholder Engagement
- Public Presentation

Project Profile:

Rental Housing Needs Assessment

Location:
Newark, DE

Client:
City of Newark

Completion Date:
2017

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Over the recent years, the University of Delaware has experienced significant growth in off-campus student population, and the City has experienced related community impacts associated with this growth. In a city of 32,000 residents and roughly 14,500 rental households, an estimated 10,700 of the renters are UD students living off campus.

Urban Partners was retained by the City of Newark to conduct a detailed analysis of the supply and demand of rental housing, including the review of historical and current data, and projections based on city and University of Delaware population growth, zoning designations, and economic development for the next twenty-five years.

Additionally, our analysis included: i) comprehensive evaluation of rental housing needs in Newark, including recommendations by housing type, size and location; and ii) an assessment of the current homeowner assistance programs, single family occupancy and maintenance controls, and strategies as a tool to balance the impacts associated with off campus student rental housing growth.

Key services performed

- Housing Demand Analysis
- Town-and-Gown Community Planning
- Housing Policy Recommendation
- Public Presentation



Project Profile:

PHFA Homeownership Choice Program Assessment



The Homeownership Choice programs offered by the Pennsylvania Housing Finance Agency (PHFA) from 2000-2008 provided funding for the development of a range of single-family homeownership projects and the rehabilitation of residential units in mixed-use developments; program funds were awarded competitively for real estate development projects in urban neighborhoods and core communities throughout the Commonwealth.

In 2014, Urban Partners was part of a consultant team consisting of housing and community development experts that evaluated the program's community impacts, strengths and limitations, and the demand for similar financing program in the current housing market. The evaluation was funded through a grant from the Heinz Foundation.

In addition to the overall assessment of the program in terms of private dollars leveraged for every dollar of PHFA funds and the total number of units constructed, the consultant team chose ten projects for closer examination. From these case studies, the anecdotal evidence of the program's effects on the local housing market was examined. Key lessons from the program and the framework for a new initiative was prepared by the consultant team for PHFA to review and consider.

Key services performed

- Housing Policy Analysis & Recommendation
- Stakeholder Engagement
- Public Presentation

Location:
Harrisburg, PA

Client:
Heinz Endowment,
Pennsylvania Housing
Finance Agency

Collaborators:
Urban Ventures,
Wilson Associates

Completion Date:
2014

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Project Profile:

Mt. Washington 10-Year Neighborhood Housing Plan



The ten-year neighborhood housing strategy was commissioned by the Mount Washington Community Development Corporation (MWCDC) to provide a comprehensive, data-driven housing program for the Mount Washington and Duquesne Heights (MW/DH) neighborhoods to guide and prioritize the future expenditure of human and financial resources.

Urban Partners worked with SfSP to conduct a careful study of existing demographic and market conditions of MW/DH to develop a baseline understanding of the study area. This analysis revealed very diverse housing conditions and market dynamics across the neighborhood, impacted by topography, views, housing stock, parking, and traffic volume. This variety led to the identification of 12 micro-neighborhoods that each received its own analysis and set of strategies.

The strategies proposed in the Plan were intended for MWCDC to undertake over the next ten years. Four general categories of initiatives were developed to help guide neighborhood housing development and revitalization: housing stock quality, options and affordability, marketing and identity, and amenities and quality of life. A series of recommended initiatives were developed within each category tailored for each micro-neighborhood throughout MW/DH. An implementation matrix was also provided that prioritized the specific initiatives and included a suggested list of potential funding sources for advancing each of the strategies.

Location:
Pittsburgh, PA

Client:
Mount Washington CDC

Collaborators:
Studio for Spatial Practice

Completion Date:
2010

Key services performed

- Housing Market Analysis
- Housing Development Strategy
- Implementation Strategies

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Consultant Selection Committee
2021 Comprehensive Housing Study
Results and Recommendation
2/16/2021 Updated: 2/26/2021

Urban Partners Interview and Presentation scored highest on average and they are recommended for selection. Selection committee was reduced in number to only include committee members present for both presentations. Interviews were conducted for the two highest scores from the Selection Committee as all other responses scored significantly lower. The Consultants interviewed were Urban Partners and Bowen NR.

Urban Partner's Response to proposal scored highest on average after review by the selection committee. The response was second lowest bid, but all members of the committee scored the response highest on methodology and responsiveness to the RFP.

Interview Scores:
Urban Partners – 19.5
Bowen NR – 18.5

Synthesis of Committee deliberations:
Bowen arguably demonstrated the highest technical ability for analysis and demonstrated a clear understanding of the scope of the proposal. However, Urban Partners demonstrated an understanding of creating final product including analysis and recommendations of technical information in a manner accessible for the public, multiple stakeholders and officials that is arguably superior.

Consultant Interview Scores:

Bid Tabulation:

RDG:	$45,000.00
WES, LLC:	$49,985.00
Bowen NR:	$35,000.00
Thomas Miller	$48,500.00
Urban Partners	$39,732.00
Baker Tilly	$52,000.00

Estimated Cost for RFP deliverables requested: $40,000.00

No record of exclusions on sam.gov for all respondents.

Scoring:

	PH	TW	KS	Score
Bowen	96	91	87	91.3
Urban Partners	94	88	93	91.7
RDG	73	80	70	74.3
Thomas Miller	70	77	74	73.7
WES	66	46	69	60.3
Baker Tilly	55	54	53	54.0

Synthesis of Consultant Selection Committee discussion:

RDG:

RDG Planning and Design has and emphasis on presentation that exceeds the requirement of the RFP. The committee discussion noted that the high quality presentation of work samples is likely a strong contributor to the cost associated with the response. However, the proposed work and review of work sample clearly demonstrates that the intended product to be delivered clearly exceeds the housing analysis and recommendations requested and the firm regularly provides a product much more similar to a housing plan, data driven and generated with significant community stakeholder input. Selection committee was familiar of the firm's staff and previous work.

WES, LLC:

Western Economic Services, LLC is the most analytical and data driven firm of the respondents. While they may have the highest ability to identify needs in a data driven process, work samples were very formulaic and recommendations rather weak. Consistently recommendations would be as simples as "Use CPD CDBG and HOME funds to build more affordable housing." This appears to be due to their methodology and experience. The company staff were part of creating the regulatory framework for the Housing and Urban Development Analysis of Impediments. Reviewing work samples WES, LLC seems to regularly deliver to clients a thorough Analysis of Impediments to identify gaps, racial inequities in the housing market and other requirements for the HUD required study. The firm emphasized their roles in helping jurisdictions creating Consolidated Plans which the Analysis of Impediments is a component in drafting.

The Response from WES, LLC suggests they intend to deliver a similar product in response to the RFP and do not fully grasp the purpose of the Housing Study requested. Fee for optional updates was unreasonable, $39,405.00 the same as the study.

Bowen:

Bowen National Research's response was the lowest cost and briefest in detail. The committee discussed that the lack of detail was likely due to Bowen having previously been hired by the City and therefore assumes the City is familiar with their product, as well as the RFP articulated that Bowen has previously work for the City but other clients in the area resulting in a dataset already largely created assisting them in their research and keeping cost low. The extend of the response was half a page and rather general. The previous Housing Study created by Bowen for the City was satisfactory, and the response satisfies the RFP but normally. Based on the response the committee assumed the final product would be nearly identical to the last Housing Study.

Urban Partners:

Response was very presentable and easily interpreted. Clearly took consideration to specifics in the RFP and therefore it is believed would have much more customized thought into research design as compared to other respondents. Clearly had completed preliminary research into our area for designing the study. Reasonable cost and timeline relative to other respondents.

Thomas Miller:

Strong on recommendations in work samples. All around strong response except for preference for all virtual consultation and surveys. Price point above expected.

Baker Tilly:

High cost and not well organized. Response to scope of project very limited compared to the rest of the RFP response.