



HISTORIC  
FRANKLIN  
TENNESSEE

ITEM #13  
WRKS  
08/27/13

## MEMORANDUM

August 16, 2013

**TO:** Board of Mayor and Aldermen

**FROM:** Eric S. Stuckey, City Administrator  
Vernon Gerth, Assistant City Administrator  
Chris Bridgewater, Director, Department of Building and Neighborhood Services  
Kathleen Sauseda, Housing Coordinator  
Russell Truell, Assistant City Administrator / CFO  
Brian Wilcox, Purchasing Manager

**SUBJECT:** Consideration of contract award to Browne, Bortz & Coddington, Inc., doing business as BBC Research & Consulting, of Denver, Colorado in the firm, fixed total amount of \$59,700 for housing needs analysis and plan consulting services (Purchasing Office Procurement Solicitation No. 2014-001; \$60,000 budgeted in 110-82560-41900 for fiscal year 2014; Contract No. 2013-0099)

### Purpose

The purpose of this procurement is to retain consultants to render housing needs analysis and plan consulting services, the undertaking of which would provide community leaders and other stakeholders a basis for formulating specific housing priorities, policy alternatives and related strategies.

### Background

The City published on May 2, 2013 a Notice of Solicitation for Statements of Qualifications in the *Williamson Herald* for consulting services for housing needs analysis and plan. In addition, solicitation documents were sent on or about the same date directly to 44 potential respondents known or thought to be interested in this solicitation. Submittals from seven (7) consultants were publicly opened at the submittal opening held on June 4, 2013. A tabulation of the submittals received for this solicitation is attached.

All seven (7) submittals were scored by the submittal evaluation team utilizing the evaluation criteria listed in the request for qualifications. The submittal scored highest by the submittal evaluation team is from Browne, Bortz & Coddington, Inc., doing business as BBC Research & Consulting, of Denver, Colorado ("BBC"). Following completion of the evaluation of all submittals, and identification of the BBC submittal as the evaluation team's top scoring submittal, BBC was invited to prepare and submit a proposal to include a detailed scope of work and services, project timetable, fee for services and any necessary and mutually agreeable contract terms and conditions. BBC accepted this invitation and produced such a proposal, dated July 13, 2013. On July 29, 2013, members of the City's project team conducted a video conference call with key members of the consultant's project team, a result of which was the submittal by BBC of the attached revised proposal, dated July 31, 2013, that includes a six-month work period to commence upon notice of award and that more accurately addresses the expectations of the City's project team. At their August 8, 2013 special meeting, the Housing Commission voted 12-0 in favor of recommending that the Board of Mayor and Aldermen accept and approve the July 31, 2013 BBC proposal.

A copy of the Procurement Agreement (Contract No. 2013-0099) that would, contingent upon Law Department and City Administrator approval, be executed upon Board approval is attached (although the attachments referenced within the Procurement Agreement are not attached to this memo but are available upon request).



HISTORIC  
FRANKLIN  
TENNESSEE

## MEMORANDUM

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### **Financial Impact**

The July 31, 2013 BBC proposal is in the firm, fixed total amount, including expenses, of \$59,700. The Building and Neighborhood Services Department budget for fiscal year 2014 allocates \$60,000 out of the General Fund for consulting services for this project. The fee for the July 31, 2013 BBC proposal is \$300 (0.5%) under budget.

### **Options**

In accordance with the solicitation documents, the City reserves the right to reject any and all submittals.

### **Recommendation**

Staff recommends that the City accept the submittal ranked highest by the submittal evaluation team, from Browne, Bortz & Coddington, Inc., doing business as BBC Research & Consulting, of Denver, Colorado, and approve both the July 31, 2013 BBC proposal in the firm, fixed total amount, including expenses, of \$59,700 for housing needs analysis and plan consulting services as well as the Procurement Agreement referenced above. Purchasing Manager Brian Wilcox is of the opinion that the prepared solicitation documents as distributed allowed for competition among multiple vendors, and that the staff recommendation appears to be made in a fair and impartial manner based upon the submittals received.

**Tabulation of Submittals**

<b>Purchasing Office Solicitation No.:</b>		2014-001 (consulting services for housing needs analysis and plan)					
<b>Notice of Solicitation for Statements of Qualifications published in the <i>Williamson Herald</i> on:</b>		5/2/13					
<b>Number of vendors that were notified of / that responded to this request for qualifications:</b>		44 / 7					
<b>Date and time Statements of Qualifications due and publicly opened:</b>		6/4/13 2:00 PM					
<b>Present at opening of Statements of Qualifications:</b>		Vernon Gerth of the City of Franklin Administration Department; Kathleen Sauseda of the City of Franklin Building & Neighborhood Services Department; and Dee Settle, Suzanne Ward and Brian Wilcox of the City of Franklin Purchasing Office					
<b>Target meeting of BOMA at which recommendation will be considered:</b>		8/27/13					
<b>Submittals received from:</b>	<b>Submittal No.:</b>	<b>Description of submittal</b>	<b>Does the respondent take any exceptions to the City's procurement solicitation?</b>	<b>Average points allocated by submittal evaluation team based on review of submittal (out of a possible 100, utilizing evaluation criteria as listed in RFQ):</b>	<b>Payment terms:</b>	<b>Response is valid through:</b>	
Bowen National Research 155 E. Columbus St., Ste. 220 Pickerington, OH 43147 Patrick M. Bowen, President (614) 833-9300 patrickb@bowennational.com	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions	71.00	net 30 days	12/31/13	
Browne, Bortz & Coddington, Inc. dba BBC Research & Consulting 1999 Broadway, Suite 2200 Denver, CO 80202 Heidi Aggeler, Managing Director (303) 321-2547, ext. 256 aggeler@bbcresearch.com	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions	92.00	net 30 days	12/31/13	
Ernest Swiger Consulting, Inc. 123 Acorn Lane Stroudsburg, PA 18360 Sharon A. Swiger, President (570) 856-4437 saswiger@ptd.net	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions	76.50	net 30 days	09/30/13	
MarketGraphics Research Group, Inc. 357 Riverside Dr., Suite 210 Franklin, TN 37064 Joe Zanola, President, Zanola Co. (314) 918-7200 jzanola@zanolaco.com	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions but included proposed contract terms which would need to be vetted	67.67	net 30 days	10/31/13	

\*Shaded submittal is the submittal scored highest by the submittal evaluation team

**Tabulation of Submittals \***

<b>Purchasing Office Solicitation No.:</b>		2014-001 (consulting services for housing needs analysis and plan)				
<b>Notice of Solicitation for Statements of Qualifications published in the <i>Williamson Herald</i> on:</b>		5/2/13				
<b>Number of vendors that were notified of / that responded to this request for qualifications:</b>		44 / 7				
<b>Date and time Statements of Qualifications due and publicly opened:</b>		6/4/13 2:00 PM				
<b>Present at opening of Statements of Qualifications:</b>		Vernon Gerth of the City of Franklin Administration Department; Kathleen Sauseda of the City of Franklin Building & Neighborhood Services Department; and Dee Settle, Suzanne Ward and Brian Wilcox of the City of Franklin Purchasing Office				
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<b>Submittals received from:</b>	<b>Submittal No.:</b>	<b>Description of submittal</b>	<b>Does the respondent take any exceptions to the City's procurement solicitation?</b>	<b>Average points allocated by submittal evaluation team based on review of submittal (out of a possible 100, utilizing evaluation criteria as listed in RFQ):</b>	<b>Payment terms:</b>	<b>Response is valid through:</b>
Northeast & Bucks Co. T/A Mullin & Lonergan Associates Inc. 3909 Hartzdale Dr., Suite 901 Camp Hill, PA 17011 Marjorie Williams, Principal (412) 323-1950 marjorie@mandl.net	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions	83.17	net 30 days	09/30/13
RKG Associates, Inc. 300 Montgomery St., Suite 203 Alexandria, VA 22314 Russell Archambault, VP & Principal (703) 739-0965, ext. 2 arch@rkgassociates.com	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions but included proposed contract terms which would need to be vetted	83.33	net 30 days	12/04/13
Western Economic Services, LLC 212 SE 18th Ave. Portland, OR 97214 (503) 239-0236 Robert M. Gaudin, Dir. of Research & Planning rgaudin@wes.info	1 of 1	consulting services for housing needs analysis and plan	Respondent takes no exceptions	65.67	net 30 days	10/01/13

\*Shaded submittal is the submittal scored highest by the submittal evaluation team

## SECTION 3.

# Project Approach and Experience-REVISED

This section satisfies the requirements of Sections 3a. through 3e. of the Request for Qualifications, pages 5 and 6. This section has been revised as of July 31, 2013, to 1) provide more detail on completion of certain tasks; 2) address how we would approach the primary goals of the study; 3) provide a timeline for each task; and 4) include a budget that falls within the city's desired cost.

### Project Approach

**Project understanding.** The City of Franklin desires to conduct a housing needs analysis (HNA) to better understand key housing issues, focusing on current unmet housing demand as well as projected demand over the next five to 15 years. In the broadest terms, this study will:

- Characterize the current demographic characteristics of Franklin residents as related to housing preferences and needs;
- Analyze demographic and growth projections for future Franklin residents in five, 10 and 15 years in terms of housing demand;
- Examine the economic profile of Franklin (including county-level commuting patterns and employment growth, using secondary data) and its impact on housing demand;
- Determine housing affordability, both for sale and rental, by specified income groups and identify where the market is currently under- or over-providing housing by price point; and
- Examine the city's existing infrastructure, resources and policies, as they relate to the provision of housing for Franklin residents.

**A healthy housing community.** A key part of the HNA is informing the question: "In terms of housing, what is a healthy community? What types of housing are desired by the people of Franklin?"

This is a tricky question. A healthy housing community can mean different things to different people in different places.

The Williamson County Association of Realtors (WCAR) recently began to explore the topic as part of its Franklin Tomorrow vision and plan. The WCAR plan suggests that provision of affordable housing is needed to maintain housing health in Franklin.

BBC's approach would build upon the thinking about housing health that has already taken place in Franklin. Our study would add a quantitative measure of housing needs and, through resident and stakeholder input, continue the community conversation about housing health that has already begun.

**Challenges in conducting the study.** The primary challenge involved in the project is one common to all housing forecasts: Projecting future housing demand contains an inherent level of uncertainty. Consumer preferences, employment trends, economic development and commuting choices are all interdependent, dynamic systems that make housing demand difficult to predict, especially in a large metropolitan area such as the Nashville MSA.

In order to address that challenge, BBC would work with city staff and stakeholders to apply appropriate assumptions and employ the most recent available data to project future housing need in the City of Franklin. We would also use multiple projection scenarios (e.g., strong growth, weak growth) to provide upper and lower bound estimates of need.

**Project approach.** The following tasks outline BBC's proposed work scope. The approach is tailored to answer the questions identified in the RFQ.

**Task 1—Project initiation meeting.** Heidi Aggeler would travel to Franklin for a project kickoff meeting. At this meeting, we could clarify items in the work scope, as needed. We would also discuss how we would communicate with the project manager during the study (e.g., biweekly conference calls).

We would also present the data we plan to use for the study, discuss data and information available from the city and stakeholders (e.g., WCAR) and review any foreseeable challenges. We would also discuss the presentation of the report and preferred display of variables—e.g., when to use maps/GIS to display information v. charts and graphs. BBC has a variety of formats which can be used for report content and style, from a color stand-alone executive summary like we used in our Grand Forks study to a formal, portrait report that is more text-heavy.

Finally, we would work with staff in this meeting to identify individuals to be included as part of the key person interview process and agree upon a communications strategy. We would also review a draft survey instrument for residents.

If acceptable to the city, we would conduct initial interviews with stakeholders when we are in town (e.g., members of the Housing Commission). This would include meeting with city leaders and city staff, as well as developers and property owners and managers and employers.

**Timeline:** *BBC would visit Franklin for the project initiation meeting in October.*

**Task 2—Data collection and analysis.** After the project initiation meeting, BBC would begin the data collection and analysis phase of the project immediately. The data collected and analyzed would include demographic, economic and employment profiles of Franklin residents as well as an assessment of Franklin's existing housing stock in terms of price, condition and location. The data collected for this task would inform the analysis discussed in Task 3 and address the following questions included in the RFQ:

- *What are the demographic and economic characteristics of households living in Franklin?*
- *What demographic is Franklin missing?*
- *Recent transportation studies have reported 25,000 people leave Williamson County daily to work elsewhere. Similarly, 25,000 people travel to Williamson County every day from neighboring counties to work. What are the primary reasons this statistic exists and what strategies can be implemented to reduce these community patterns?*

- *What is the income level of households living in our community now and in the future?*
- *In terms of trends, what can Franklin anticipate with respect to population and demographic changes in the next 2-5 years? 10 years? 15 years?*
- *What are our current employment needs and what can our community expect in the next 2-5 years? 10 years? 15 years?*

BBC would begin with 2010 Census data and the 2011 American Community Survey (ACS) which provide the most comprehensive demographic and housing market data.<sup>1</sup> Where appropriate, BBC would include data from the 2000 Census and 2005 ACS to illustrate socioeconomic and housing market trends.

We would also use Multi-List Service (MLS) data on Franklin's for-sale housing stock (and surrounding communities', as available from WCAR) to assess price and characteristics of available and recently sold properties. Rental data would be collected from newspapers and website listings of available rental units, through surveys of property owners and managers and using ACS cost distribution.

We would also collect data on assisted housing; including housing developed through federal, state and local housing programs. For employment data, BBC would use labor market information data as well as regional data from the Bureau of Labor Statistics. In order to provide context, we would incorporate comparative information from the county, state and other metro area communities as relevant.

Variables to be included are displayed below.

**Demographic Variables**

- |  |   |                                 |
|--|---|---------------------------------|
| ■ Population level, growth   | ■ Household type and family type                  | ■ Poverty rate                  |
| ■ Patterns of growth (in-migration, out-migration, natural increase) | ■ Households with disabilities                    | ■ Median income                 |
| ■ Age distribution and change  | ■ Race/ethnicity of population                    | ■ Income ranges (by \$ and AMI) |
|  | ■ Comparison of key demographics with other areas | ■ Employment status             |
|  |   | ■ Educational attainment        |

**Housing Stock Variables**

- |  |   |                  |
|--|---|------------------|
| ■ Housing by type (single family, multifamily) | ■ Home Price (homes listed for sale and/or recently sold) | ■ Rent paid      |
| ■ Household tenure                             | ■ Home Value (all homes)                                  | ■ Cost burden    |
|  |   | ■ Age of housing |

**Economic Variables**

BBC will compare the wages of workers in current and projected employment industries with housing market prices to demonstrate what workers in different professions can afford. Transportation patterns in the city and region will also be incorporated into the analysis to demonstrate the relationship between housing and employment.

<sup>1</sup> We understand the city will soon be conducting a special Census for 2014 and will incorporate any data from the Census into the report as it becomes available.

We would create the following maps by Census tract or, if the city already possesses these maps, incorporate them into the study:

- Population growth,
- Median income and poverty,
- Median rent,
- Median home value,
- Percent of housing type (single family detached, etc),
- Location of homes to buy at various price points (using MLS data).

Neighborhood overlays of the maps would be shown if the city can provide GIS files with neighborhood boundaries.

***Timeline:** Data collection and analysis would take approximately two months to complete. BBC would conduct this task during October and November, with a draft report section available for city review no later than the end of November.*

**Task 3—Housing market and gaps analysis.** Using the data and analysis from Task 2, BBC would develop a model that estimates housing demand by price, tenure and market segment to partially address the following questions included in the RFQ:

- *Based on market information, what is the nature and extent of short-to-mid-term housing demand in our community? Price range? New construction or rehab? Seniors? Families? Special Needs? Students? Young Professional? Affordable? New Americans?*
- *What are the housing needs of employees from existing businesses?*

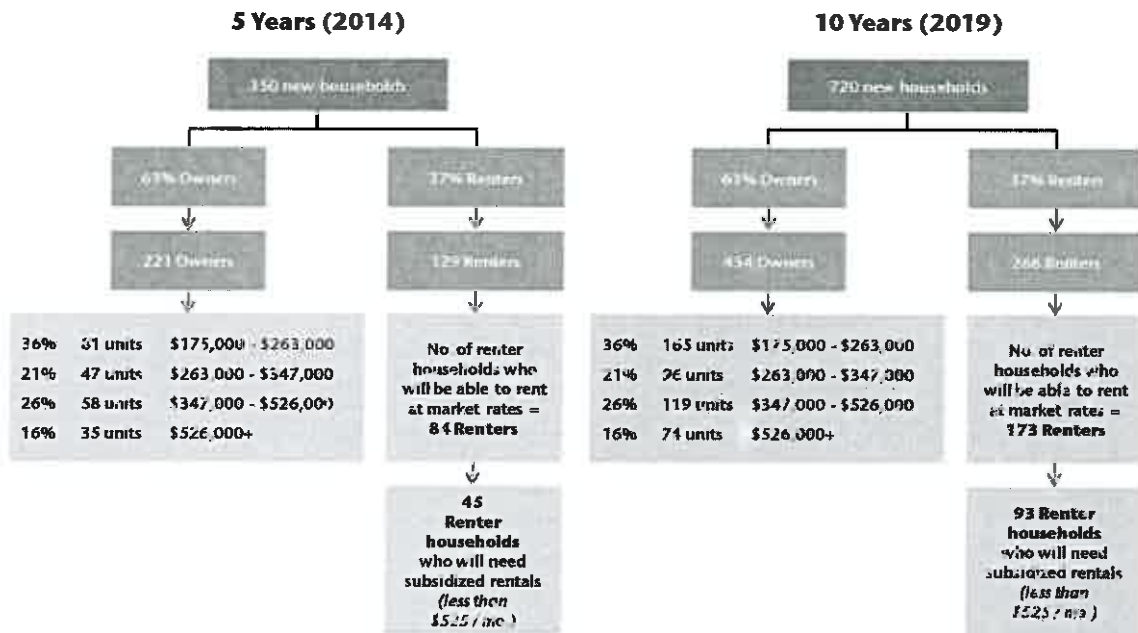
The results would be presented in the form of a gaps analysis, where BBC compares housing supply to demand and eligibility as measured through household incomes. This analysis would pinpoint the greatest areas of “mismatch” between housing supply and demand across all income levels within the city and would help to identify and develop strategies for balancing the city’s housing market according to expressed need and city goals.

The gaps analysis would be the basis for our needs forecasts using five, 10 and 15 year growth projections of housing needs by demographic group and type. Housing preferences would be estimated based on typical income ranges and preferences gathered in Task 4.

An example of a gaps analysis BBC performed in Gunnison County (Crested Butte), Colorado with projected need by tenure and price point is shown in the following figure.



**Figure 1.**  
**Housing Needs Projections, Gunnison County Study**



***Timeline:** This task would be completed by BBC after needed data have been obtained. The gaps analysis model would be developed in November and a report section prepared in December. We would submit a draft Housing Gaps section to the city on or before December 31, 2013.*

**Task 4—Community input.** For this task, BBC would work with the city to develop a public input process that reaches targeted audiences and generates sufficient information to address the market questions posed by the RFQ, specifically in regard to community preferences and transportation decisions (see Task 3 questions). We recommend making surveys available online for both residents and stakeholders, including employers and community leaders.

In past studies, BBC has successfully marketed such community input through the city’s website, city email blasts, and to professional associations (to realtors, developers), as well as relevant housing providers and nonprofits. BBC would prepare a draft survey instrument and finalize the survey after city staff input. The city would be responsible for posting the surveys on websites and announcing the survey availability through email blasts.

In addition to the survey effort, we would conduct three “community conversations” about housing in Franklin. **Similar to our approach on our Las Cruces and Austin studies**, one of these meetings would be held with business/corporate leaders, private sector developers and representative employers. We would recruit attendees through trade associations (e.g., Chamber of Commerce, WCAR) and hold the meeting at a convenient time for attendees, likely in the morning with breakfast provided.

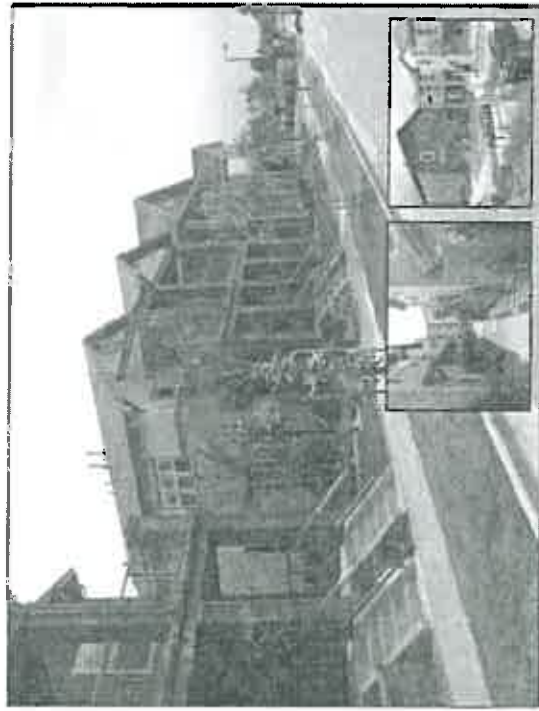
The two additional community conversations would be held with residents. These meetings would target the resident groups that are found to have the greatest housing needs in our quantitative analysis (e.g., residents of historical neighborhoods, in-commuters). Our conversations would focus on realistic solutions to meet the housing needs of these groups, including how to preserve existing affordable housing stock and neighborhood character.

**An example of a community conversation about housing preferences:** In a Transit-Oriented-Development (TOD) study we did for the City of Boulder during 2006, we held several meetings with targeted resident groups to test TOD housing demand. We provided examples of potential housing types that would be affordable to the target groups (seniors, racial and ethnic minorities and in-commuters) and discussed the trade-offs residents would be willing to make—or not—to live in Boulder. We learned that seniors were uncomfortable with TOD and that most in-commuters were willing to bear the “commute cost” for a larger, newer home outside of Boulder. This study has informed Boulder’s approach to workforce housing. An example of the worksheets we used in the Boulder TOD community conversations are shown in the figure on the following page.

The community input process would also include 10-15 interviews with stakeholders, including members of the Housing Commission. We would also interview administrators at assisted housing providers (Habitat for Humanity, Franklin Housing Authority); private developers; Franklin Tomorrow staff; key employers; Housing Commission members; and city staff.

**Timeline:** BBC would provide the city with a draft survey at our project initiation meeting. Upon city approval of the survey instrument, we would circulate the survey and make it available for 1.5 months. Ideally, we would like the survey to be in the field from late October to mid-December. The community conversations would take place in mid-January to early February, after the holidays and subsequent to completion of the gaps analysis. The city would assist us with providing venues for the meetings. Stakeholder interviews would take place in person and by phone throughout the project.

**Figure 2.**  
**Boulder Housing Preference Work Sheet**



1. Is this an appropriate type of housing for the TVA?  
 \_\_\_\_\_
2. What kind of person or household would find this type of housing appealing? (Age, family composition, etc)  
 \_\_\_\_\_
3. If this housing were for sale, what price do you think it should sell for?  
 \$ \_\_\_\_\_
4. If this type of housing were for rent, what do you think the monthly rent would be?  
 \$ \_\_\_\_\_ per month
5. What are the benefits of this type of housing being built in the City of Boulder?  
 \_\_\_\_\_  
 \_\_\_\_\_
6. What are the negatives of this type of housing?  
 \_\_\_\_\_  
 \_\_\_\_\_

Take a look at the examples of housing types we've put together on these sheets. Review each image and briefly respond to the questions we've listed on the page. Take five minutes to respond.

**Task 5—Public policies and resources.** In this task BBC would examine how the city’s infrastructure, resources and policies that impact current and future housing development in the context of the following questions included in the RFQ:

- *What can be done to make the best use of existing infrastructure and natural resources?*
- *What impediments to affordable housing are unique to Franklin? What have other cities successfully done to increase accessibility to affordable housing?*
- *What are the strengths and weaknesses of Franklin’s current land use plans and development policies in terms of addressing the housing needs of its residents currently and in the next five, 10, and 15 years?*

This task would include a public policy review of Title 21. “Affordable and Workforce Housing.” of the City’s Municipal Code, the city’s land use and zoning codes (incorporating a conference call with Greg Dale of Clarion Associates), development process (from discussions with developers and planning staff) and fees. We would incorporate strategies for sustainable growth into our discussions with stakeholders to help frame our recommendations (e.g., provide examples of how the past suburban model of growth creates heavier use of roadways, causes increased congestion).

**For example**, in our Austin, Texas housing study, stakeholders in our focus groups and interviews—both advocates for affordable housing and market rate developers—consistently mentioned neighborhood-level plans as a barrier to housing development. These comments prompted us to review a sample of neighborhood plans and planning decisions and develop recommendations for how the barriers could be reduced.

***Timeline:** Information for this analysis would be collected throughout the project during stakeholder interviews and discussions with city staff. Recommendations for modifying policies and resources would be included in the needs identification/recommendations section of the draft report. If we feel that a specific recommendation would be controversial, we would discuss this with city staff well in advance of the draft report submission.*

**Task 6—Needs identification and strategies.** Following the quantitative and qualitative analyses conducted in Tasks 1 through 5, BBC would identify the key housing needs for Franklin’s current and future renters, homeowners and workforce. Based on those needs, BBC would craft a set of proposed strategies to help the city address its unmet housing demand and provide adequate housing supply in the framework of creating a healthy, livable community.

We understand these strategies should focus on:

- Rehabilitation of existing, older housing stock to preserve character (of housing and neighborhoods) and affordability;
- Continued engagement of employers in strategies to create a balanced housing stock;
- Creating future housing—through new construction and redevelopment—that will serve future needs and maintain a balanced housing stock (i.e., build for the future rather than for the past);

- Potential public private partnerships and public policies to incentivize the creation of desired housing types and price points.

The strategies would also incorporate our recommendations for future communication about affordable housing with residents and employers. This communication would likely focus on the economic consequences of not providing housing for workforce and the desire to provide housing across many generations of Franklin residents. A past client of BBC's, Fort Collins, developed a successful campaign that may be a starting point.

*Timeline: BBC would conduct this task in late December and January, as part of preparation of the draft report.*

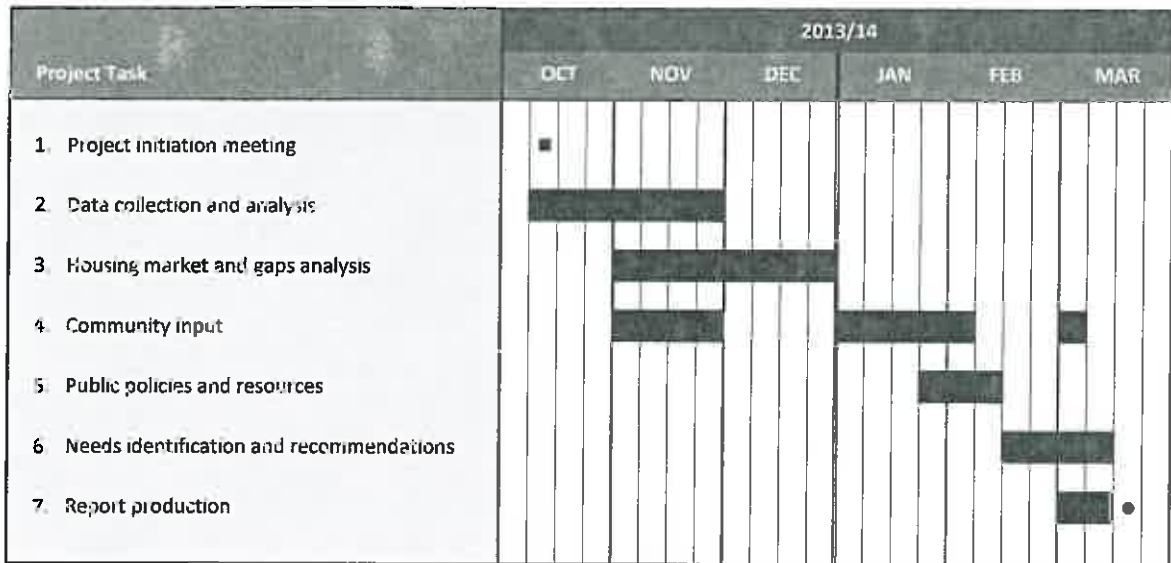
**Task 7—Report production.** The full draft report would synthesize Tasks 1 through 6 to characterize the city's population, economy and housing market; to identify the city's top housing needs. The report would also include recommendations for addressing the city's short- and mid-term housing needs.

We would provide the city a draft report in electronic form approximately six months after the project initiation meeting. The city would have two weeks to review the report, after which BBC would make suggested changes and produce a final report.

*Timeline: BBC would submit a draft report to the city on or before January 31, 2014. As specified above, BBC would submit draft report sections to the city as they are completed. This would include a draft Community Profile and Housing Market section on or before November 30, 2013 and a draft Housing Gaps section on or before December 31, 2013.*

**Project timeline.** Figure 3 displays BBC's proposed project timeline. The proposed timeline assumes an award date in October 2013 and assumes a six-month work period.

**Figure 3.  
Proposed Project Timeline**



Key:  
 ■ Meeting  
 ● Deliverable

**Project budget.** Figure 4 displays BBC’s proposed budget for completing the project. This budget includes costs to complete all of the tasks described above; it represents BBC’s “firm and fixed” price. In addition, BBC would travel to Franklin at the project conclusion to make a two hour presentation of report findings and recommendations to an audience of your choice at no cost.

**Figure 4.  
Proposed Project Budget by Task**

Project Task	Managing Director (\$175/hr)	Director/Sr. Associate (\$150/hr)	Research Associate (\$115/hr)	Project Support (\$50/hr)	Travel Costs	Total Cost
1. Project initiation, management	\$2,100	\$0	\$0	\$0	\$1,000	\$3,100
2. Data collection and analysis	1,400	12,000	2,000	0	0	15,400
3. Gaps analysis	3,500	9,000	0	0	0	12,500
4. Community input	1,400	9,000	0	400	3,000	13,800
5. Public policy and resources	2,800	2,800	0	0	0	5,600
6. Needs identification, recommendations	3,500	1,200	0	0	0	4,700
7. Report production	1,400	1,200	0	2,000	0	4,600
<b>Total cost</b>						<b>\$59,700</b>

# CITY OF FRANKLIN, TENNESSEE PROCUREMENT AGREEMENT

(City of Franklin Contract No. 2013-0099)

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THIS PROCUREMENT AGREEMENT ("AGREEMENT") is by and between the City of Franklin, Tennessee ("CITY"), and Browne, Bortz & Coddington, Inc., doing business as BBC Research & Consulting ("VENDOR"), who mutually agree as follows:

1. CITY issued (a) on May 7, 2013 Purchasing Office Solicitation No. 2014-001, a request for qualifications for consulting services for housing needs analysis and plan; and (b) on May 22, 2014 Addendum No. 1 to Purchasing Office Solicitation No. 2014-001 (collectively, "SOLICITATION"), a copy of which is attached hereto as Attachment No. 1 and hereby incorporated by reference as if fully set forth herein.
2. In response to CITY's SOLICITATION, VENDOR submitted a response dated May 30, 2013 ("SUBMITTAL"), a copy of which is attached hereto as Attachment No. 2 and hereby incorporated by reference as if fully set forth herein.
3. CITY issued to VENDOR a July 10, 2013 letter invitation to propose ("INVITATION"), a copy of which is attached hereto as Attachment No. 3 and hereby incorporated by reference as if fully set forth herein.
4. In response to CITY's INVITATION, VENDOR submitted a proposal dated July 13, 2013.
5. CITY and VENDOR conducted a video conference call on July 29, 2013.
6. VENDOR submitted a revised proposal dated July 31, 2013 ("JULY 31, 2013 PROPOSAL"), aspects of which include (a) a six-month work period to commence upon notice of award, (b) a firm, fixed total fee, including expenses, of \$59,700, and (c) the public policy review to include Title 21, "Affordable and Workforce Housing," of the City's Municipal Code, a copy of which is attached hereto as Attachment No. 4 and hereby incorporated by reference as if fully set forth herein.
7. VENDOR has now also submitted three Certificates of Insurance that collectively meet or exceed CITY's Insurance Requirements as specified in SOLICITATION, copies of each of which are collectively attached hereto as Attachment No. 5 and hereby incorporated by reference as if fully set forth herein.
8. CITY awarded on September 10, 2013 and now desires to retain VENDOR to render consulting services for housing needs analysis and plan pursuant to SOLICITATION, SUBMITTAL, INVITATION and JULY 31, 2013 PROPOSAL.
9. In the event of a conflict between JULY 31, 2013 PROPOSAL and either SOLICITATION or SUBMITTAL, then JULY 31, 2013 PROPOSAL shall supersede conflicting terms and conditions found in either SOLICITATION or SUBMITTAL or both. In the event of a conflict between SOLICITATION and SUBMITTAL, SOLICITATION shall supersede conflicting terms and conditions found in SUBMITTAL, except for any exceptions identified by VENDOR in its SUBMITTAL and accepted at the time of award by CITY.



**CITY OF FRANKLIN, TENNESSEE  
PROCUREMENT AGREEMENT**

(City of Franklin Contract No. 2013-0099)

EXECUTED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 20\_\_.

For VENDOR:

  
\_\_\_\_\_  
(signature of VENDOR's authorized representative)

TITLE: Managing Director

For CITY:

\_\_\_\_\_  
(signature of CITY's authorized representative)

TITLE: Mayor

Approved as to Form:

\_\_\_\_\_  
Kristen L. Corn, Staff Attorney