

Qualifications for Corridor Land Use Planning Study

In response to Solicitation Number: 61000006917, RFQ 16-021
City of San Antonio

8 February 2016

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All items have been submitted electronically as separate PDF files.

EXECUTIVE SUMMARY

STATEMENT OF WORK

We understand that as SA Tomorrow nears completion, the City of San Antonio (CoSA) will find itself at a tipping point. After nearly a decade of reinvestment in Downtown, the energy that drove redevelopment of the Pearl Brewery and Lower Broadway is poised to spill over into the City's vital transportation corridors. How that growth is accommodated and how it helps realize the goals set forth in SA Tomorrow and the SA Sustainability Plan will be driven by a strong roadmap for implementation.

In order to provide CoSA with the tools to realize its long-term vision for transit-supportive land use and actionable strategies for near term redevelopment, we have assembled a dynamic team of local and national experts who are passionate about urban revitalization. Fregonese Associates (FA) has more than 15 years of experience working with cities and regions to develop implementable plans yield tangible results. In addition, we have retained the expertise of leading national and local transportation, economics, and public involvement firms to assist in this effort.

At the heart of our practice is Envision Tomorrow, a rigorous spatial analysis tool that can provide an analytical framework for understanding the built environment and market conditions. We enhance what we learn using ET through on the ground research and stakeholder input. One of the cornerstones of our practice is communicating complex technical information in a way that meaningfully engages people of all knowledge levels. We use photo-realistic visualizations and infographics to gather important feedback to refine our models and assumptions.

The technical analyses outlined in the RFQ will require an efficient and thoughtful approach and we believe we are uniquely positioned to provide those services. The Envision Tomorrow suite of planning tools have been in use by CoSA and VIA for several years and additional tools have recently been developed and customized specifically for the San Antonio region. Moreover, our team's recent work with VIA and CoSA mean we also have access to a wealth of value-added local market, urban form, and infrastructure data. With past experience that spans both of the major on-going planning efforts in the region we also have context and a clear understanding of the goals of this project: to provide a set of actionable strategies that will help the City accommodate its 1.1 million additional future residents in a way that respects the environment, the economy, and local quality of life.

EXECUTIVE SUMMARY

OVERALL TECHNICAL APPROACH

Our approach to this project is founded on the principal that the models and spatial analysis tools that we develop will not be static, but will provide a foundation for the City to further enhance and easily maintain over time. We will provide datasets that integrate with Google Earth, ArcGIS and Excel, providing a completely replicable and functional core data set that CoSA can adapt as needed. Fundamental to our technical approach is:

- Developing a replicable and transparent methodology that identifies development opportunities that support community goals.
- Using reliable and available data resources that enable seamless updates and allow the City to measure impacts and understand change over time.
- Creating tools that are accessible and can be used to communicate to stakeholders (property owners, decision makers, the public, and developers) in a meaningful way.

Our approach is outlined in detail in the Proposed Plan section of this RFQ response. Below is a summary of our overall approach to each major task and key outcomes from each effort.

TASK 1

In this task, the Fregonese Associates team will develop a GIS-based land use profile for each VIA Vision 2040 corridor using the Envision Tomorrow suite of open source planning tools. In order to link these profiles with on-going planning efforts, we will use a recently completed Transit Supportive Land Use (TSLU) Capacity Analysis for the region as the starting point for the corridor land use profiles. Our team will work with CoSA and VIA staff to refine the GIS-based scenarios as needed. We will leverage our team of experts and Envision Tomorrow's 80+ indicators to track each corridor's performance in terms of:

- Market Feasibility
- Financial Feasibility
- Equity
- Environmental Impacts
- Community Acceptanc
- Impacts on Travel Behavior
- Policy Needs

EXECUTIVE SUMMARY

In addition to GIS-based scenarios, we propose including up to three (3) birds-eye renderings using ESRI's City Engine visualization engine to help communicate the corridor-wide impact of future land uses being "optimized" for transit.

TASK 2

Task 2 will bring together the set of actionable strategies required to realize the land use profiles developed in task 1 and begin testing their efficacy at the station-area level. We will also create a Recommendation and Action Item Matrix with prioritized capital improvements, preliminary costs, and responsible agencies.

We will work with CoSA staff to perform station area identification – the selection and categorization of every station area within each of the corridors. As the lead authors of VIA's Guide to Transit Supportive Land Use, we have in-depth knowledge of VIA's station area typologies and will further customize a recently completed station area identification methodology. From this database of station areas, we will work with CoSA staff to select up to twelve (12) stations for station area concepts. In addition, we will develop up to twelve (12) photo-realistic renderings that show existing and potential future land uses and infrastructure improvements.

Finally, we will work with CoSA to select an additional six (6) high capacity transit (HCT) station areas for detailed station area planning work. The goal of these station area plans will not only be to identify capital projects and optimized land uses but also to examine land ownership and identify up to two (2) catalyst development sites for each station area for further analysis. FA will develop additional photo-realistic renderings of these catalyst sites to help communicate their redevelopment potential to stakeholders and developers.

TASK 3

In this task FA and RJ Rivera Associates will work with City staff to develop a public engagement plan. In addition to social media outreach and focus groups, we propose three touch points with the general public. The first touch will be concurrent with task 1 and will involve a web-based mapping application that will allow residents and business owners to submit their comments on land use and infrastructure concerns and aspirations in each corridor. We will also produce hard-copy versions of these maps for use during live events. Our second touch point will take the form of up to three (3) station area workshops that will allow local residents and business owners to provide detailed comments on future land uses, pedestrian crossings, and transit access. The final public touch point will be a public open house where we will gather feedback on draft station area plans, renderings, and the Action Plan.

EXECUTIVE SUMMARY

ADDITIONAL TASKS

In addition to the tasks outline in the scope of services, Fregonese Associates proposes 2 half-day Envision Tomorrow trainings for CoSA and VIA staff, as well as staff from other local agencies. The goal with these trainings is to continue to build on the local Envision Tomorrow expertise that has been developed at CoSA and VIA in recent years. We feel strongly that building this internal capacity will allow us to leave you with more than just an Action Plan. Rather you will have a calibrated model that you can use to continue to refine station area plans, test new strategies such as zoning and incentives, and identify future catalytic redevelopment sites.

UNIQUE ISSUES

PROJECT SCHEDULES

With two concurrent planning projects closely related to the Corridor Land Use study, it will be important to maintain clear communication regarding schedules and the timing of public events. Special attention will have to be paid to developing a public engagement plan that works with SA Tomorrow and VIA Vision 2040 while allowing adequate time for outreach materials to be produced.

TECHNICAL PROJECTS OFTEN RUN INTO TECHNICAL ISSUES

With a budget of \$250,000 the importance of data availability and quality are key. If the team has to spend a great deal of time searching for, cleaning, and even creating data sources this can add significant time and cost to a project. Our approach is to understand data needs at the outset, and work together find efficiencies to stay under budget. We have made every effort to leverage our involvement in other recent and on-going planning projects to help mitigate this issue.

GENERAL INFORMATION FORM

016 - RFP ATTACHMENTS

RFP ATTACHMENT A, PART ONE

GENERAL INFORMATION

1. **Respondent Information:** Provide the following information regarding the Respondent.

Respondent Name: Fregonese Associates, Inc.

(NOTE: Give exact legal name as it will appear on the contract, if awarded.)

Principal Address: 1525 SW Park Ave Ste 200

City: Portland State: OR Zip Code: 97201

Telephone No. 503-228-3054 Fax No.: 503-525-0478

Website Address www.frego.com

Year established: 1997

Provide the number of years in business under present name: 8 yrs

Social Security Number or Federal Employer Identification Number: 20-5315355

CRD Number (if applicable): N/A

Texas Comptroller's Taxpayer Number, if applicable: 32038160399

(NOTE: This 11-digit number is sometimes referred to as the Comptroller's TIN or TID.)

DUNS NUMBER: 005525581

Business Structure: Check the box that indicates the business structure of the Respondent.

Individual or Sole Proprietorship If checked, list Assumed Name, if any: Partnership

Corporation

If checked, check one: For-Profit Nonprofit

Also, check one: Domestic Foreign

Other If checked list business structure:

Printed Name of Contract Signatory: John Fregonese

Job Title: President

(NOTE: This RFP solicits proposals to provide services under a contract which has been identified as "High Profile". Therefore, Respondent must provide the name of person that will sign the contract for the Respondent, if awarded.)

GENERAL INFORMATION FORM

Provide any other names under which Respondent has operated within the last 10 years and length of time under for each:

Provide address of office from which this project would be managed: 1525 SW Park Ave Ste 200

City: Portland State: OR Zip Code: 97201

Telephone No. 503-228-3054 Fax No: 503-525-0478

Annual Revenue: \$ 2.7 mil

Total Number of Employees: 12

Total Number of Current Clients/Customers: 19

Briefly describe other lines of business that the company is directly or indirectly affiliated with:

List Related Companies:

N/A

2. **Contact Information:** List the one person who the City may contact concerning your proposal or setting dates for meetings.

Name: John Fregonese Title: President

Address: 1525 SW Park Ave Ste 200

City: Portland State: OR Zip Code: 97201

Telephone No. 503-228-3054 Fax No: 503-525-0478

Email: john@frego.com

3. Does respondent anticipate any mergers, transfer of organization ownership, management reorganization, or departure of key personnel within the next twelve (12) months?

Yes _____ No

4. Is Respondent authorized and/or licensed to do business in Texas?

Yes No _____

If "Yes", list authorizations/licenses.

Taxpayer # 32038160399

GENERAL INFORMATION FORM

5. Where is the Respondent's corporate headquarters located?

1525 SW Park Ave Ste 200 Portland, OR 97201

6. **Local/County Operation:** Does the Respondent have an office located in San Antonio, Texas?

Yes _____ No If "Yes", respond to a and b below:

a. How long has the Respondent conducted business from its San Antonio office?

Years _____ Months _____ Type of Office _____

b. State the number of full-time employees at the San Antonio office.

If "No", indicate if Respondent has an office located within Bexar County, Texas:

Yes _____ No If "Yes", respond to c and d below:

c. How long has the Respondent conducted business from its Bexar County office?

Years _____ Months _____

d. State the number of full-time employees at the Bexar County office.

7. **Debarment/Suspension Information:** Has the Respondent or any of its principals been debarred or suspended from contracting with any public entity?

Yes ___ No If "Yes", identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

8. **Surety Information:** Has the Respondent ever had a bond or surety canceled or forfeited?

Yes ___ No If "Yes", state the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.

9. **Bankruptcy Information:** Has the Respondent ever been declared bankrupt or filed for protection from creditors under state or federal proceedings?

Yes ___ No If "Yes", state the date, court, jurisdiction, cause number, amount of liabilities and amount of assets.

10. **Disciplinary Action:** Has the Respondent ever received any regulatory/disciplinary action, or any pending regulatory/disciplinary action, from any regulatory bodies or professional organizations? If "Yes", state the name of the regulatory body or professional organization, date and reason for disciplinary or impending disciplinary action.

GENERAL INFORMATION FORM

N/A

11. Previous Contracts:

a. Has the Respondent ever failed to complete any contract awarded?

Yes ___ No If "Yes", state the name of the organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

b. Has any officer or partner proposed for this assignment ever been an officer or partner of some other organization that failed to complete a contract?

Yes ___ No If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

c. Has any officer or partner proposed for this assignment ever failed to complete a contract handled in his or her own name?

Yes ___ No If "Yes", state the name of the individual, organization contracted with, services contracted, date, contract amount and reason for failing to complete the contract.

GENERAL INFORMATION FORM

REFERENCES

Provide three (3) references, that Respondent has provided services to within the past three (3) years. The contact person named should be familiar with the day-to-day management of the contract and be willing to respond to questions regarding the type, level, and quality of service provided.

Reference No. 1:

Firm/Company Name: Austin Code Next
Contact Name: Jim Robertson Title: Urban Design Division, PDRD
Address: 2006 East 4th Street
City: Austin State: TX Zip Code: 78702
Telephone No. 512-974-3564 Email: Jim.Robertson@austintexas.gov
Date and Type of Service(s) Provided: Development Code Rewrite
(2014-present)

Reference No. 2:

Firm/Company Name: Powell-Division Transit and Development Project
Contact Name: Alexandra Howard Title: Project Coordinator
Address: 1221 SW 4th Avenue
City: Portland State: OR Zip Code: 97204
Telephone No. 503-823-7849 Email: alexandra.howard@portlandoregon.gov
Date and Type of Service(s) Provided: Transit Development (2014-2015)

Reference No. 3:

Firm/Company Name: Dallas TOD
Contact Name: Luis Tamayo Title: Project Manager
Address: 1500 Marilla Ave Rm 5CN
City: Dallas State: TX Zip Code: 75201
Telephone No. 214-670-5404 Email: luis.tamayo@dallascityhall.com
Date and Type of Service(s) Provided: Transit-Oriented Development Plan
(2011-2013)

EXPERIENCE, BACKGROUND & QUALIFICATIONS

RFQ ATTACHMENT A, PART TWO

EXPERIENCE, BACKGROUND, QUALIFICATIONS

Prepare and submit narrative responses to address the following items. If Respondent is proposing as a team or joint venture, provide the same information for each member of the team or joint venture.

1. Describe Respondent's experience relevant to each of the components of the Scope of Services requested by this RFQ. List and describe relevant projects of similar size and scope performed over the past four years. Identify associated results or impacts of the project/work performed.
2. Describe Respondent's specific experience with public entities clients, especially large municipalities. If Respondent has provided services for the City in the past, identify the name of the project and the department for which Respondent provided those services.
3. For each of the components, describe staffing and other resources to be dedicated:
 - a) List other resources, including total number of employees, number and location of offices, number and types of equipment available to support this project.
 - b) If Respondent is proposing as a team or joint venture or has included sub-contractors, describe the rationale for selecting the team and the extent to which the team, joint ventures and/or sub-contractors have worked together in the past.
 - c) Identify the number and professional qualifications (to include licenses, certifications, associations) of staff to be assigned to the project and relevant experience on projects of similar size and scope.
4. State the primary work assignment and the percentage of time key personnel will devote to the project if awarded the contract.
5. Additional Information. Identify any additional skills, experiences, qualifications, and/or other relevant information about the Respondent's qualifications.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

1. *Describe Respondent's experience relevant to each of the components of the Scope of Services requested by this RFQ. List and describe relevant projects of similar size and scope performed over the past four years. Identify associated results or impacts of the project/work performed.*

We are including a response to this question for each of our team members.

FREGONESE ASSOCIATES INC.

Fregonese Associates (FA) is a premier land use planning firm in Portland, Oregon, with an award-winning track record of helping make better cities and regions since 1997. Our dynamic, multi-disciplinary team provides innovative solutions and technical expertise that help shape the way communities and regions grow in concert with their vision of the future. We specialize in scenario planning, GIS analysis, project management, comprehensive planning, visualizations, implementation strategies, Envision Tomorrow training and support for city staff, and innovative public engagement programs and materials. We have had tremendous success managing complex projects engaging civic and community leaders, diverse groups of citizens and technical experts to develop feasible solutions to current issues and future growth. We strongly believe in engaging people in meaningful discussions about what they want for their future and in creating plans that can be implemented, taking into account market and political realities to provide action-oriented strategies and solutions.

The breadth of our work has provided us with extensive experience in public engagement, corridor and station area land use planning, economic development, and travel behavior analysis. Services we bring to this effort include:

- Real estate market analysis
- Zoning and policy analysis
- Innovative public engagement
- Land use optimization with Envision Tomorrow
- Planning for revitalization of distressed areas through feasibility modeling
- Affordable housing and anti-displacement strategies
- Travel behavior modeling

These elements are embedded in many of our projects such as our work locally with VIA Metropolitan Transit on their long range plan corridors and transit supportive land use guidelines, in Dallas on developing Transit Oriented Development (TOD) implementation strategies, in the Portland region on a potential Bus Rapid Transit (BRT) corridor, and in Austin on their CodeNext Form Based Code update. For VIA, we led a collaborative effort with Cambridge Systematics to create a Transit-Supportive Land Use

EXPERIENCE, BACKGROUND & QUALIFICATIONS

(TSLU) Guide and are currently working on a TSLU Strategic Plan element for VIA's Long Range Comprehensive Transportation Plan. In Dallas we performed site specific TOD analysis and made recommendations for community development tools to support catalytic development. This led to the subsequent RFP issued on one of the sites analyzed as part of the Dallas TOD project. For the Cities of Portland and Gresham, we performed redevelopment feasibility analyses in 8 focus areas and developed an Action Plan which included a prioritized list of capital improvements to help leverage their investment in BRT. In Austin, our involvement in the CodeNext project includes financial feasibility, housing affordability, and environmental performance testing using Envision Tomorrow.

RELEVANT PROJECTS

Powell – Division Transit and Development Project **Metro Portland, City of Portland, City of Gresham (2014 – 2015)**

The Powell-Division Corridor stretches eastward from Central Portland 13 miles to the heart of downtown Gresham. Today, the corridor is characterized by a range of land uses and market conditions. While the pace of development in close-in sections of the corridor has accelerated in recent years, much of the corridor is dominated by auto-oriented land uses and a stagnant real estate market. A proposed bus rapid transit (BRT) line has the potential to drastically alter the landscape along the corridor and catalyze new development, but only if local policies are tailored to leverage this public investment.

Fregonese Associates worked with the Cities of Gresham and Portland to perform a market-driven assessment of 12 nodes along the Powell-Division corridor to assess their transit-supportive development potential over the next 5-10 years. The Envision Tomorrow suite of Urban Planning tools was then used to create alternative development scenarios. These scenarios helped the City of Portland and the City of Gresham evaluate potential zone changes, public realm investments, and development incentives that will help to leverage the region's investment in high capacity transit.

In addition to scenario analysis, our team led an extensive public outreach campaign which included urban design charrettes and interactive instant polling. The information gleaned from public input was used in conjunction with our scenario analysis to create a land use vision for each node within the corridor and an action plan was created to help guide policy and implementation in the short to medium term.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

Austin CodeNext

City of Austin (2014 – 2016)

Since 2014, Fregonese Associates has been on the core team of consultants engaged in the first comprehensive overhaul of the Austin Zoning code since the 1980s. Fregonese Associates is using tools within the Envision Tomorrow scenario planning platform to examine both the existing and draft code standards. The purpose is to understand how the code impacts development outcomes, such as affordability, transportation and parking, stormwater management and other key community goals outlined in ImagineAustin, the City's Comprehensive Plan.

FA has been able to detail the link between parking standards and housing affordability, transportation mobility and stormwater. FA has been able to test the impact of shared parking strategies or reduced parking standards on development feasibility and travel behavior in key centers and corridors throughout the City. The data and models calibrated for this effort can be immediately put to use in an analysis of downtown parking strategies and standards.

Dallas TOD

City of Dallas (2011 – 2013)

Following the success of our partnership with Dallas on their Comprehensive Plan in 2006, Fregonese Associates co-led the Dallas TOD project. Fregonese Associates worked to implement the recommendations of forwardDallas! Comprehensive Plan by completing five station area plans for neighborhoods near seven DART light rail stations. Overarching goals for the Dallas TOD station area plans include the creation of safe, attractive community centers that offer a range of affordable housing options for new and existing residents; improved access to transit; and the identification of market-feasible catalytic development sites that outline specific recommendations for implementation. Based on these development recommendations, the City of Dallas has already starting issuing request for proposals to find development partners for a number of the identified sites.

The station area plans were approved in the spring of 2013. The plan spurred the development of four mixed use projects, including a mixed use library in Vickery meadows that will be built by the Austin based DMA Development Corp.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

CAMBRIDGE SYSTEMATICS

Cambridge Systematics (CS) has offered critical support to hundreds of metropolitan planning organizations, regional and county agencies, cities, port authorities, and steamship authorities. All look to us for help managing increasingly complex issues in moving passengers and goods with limited budgets.

As partners, we help identify and address considerations around land use, environmental and economic impacts, and community concerns. All of our clients, from rural counties to densely populated municipalities, remark on their appreciation for our teams' focused attention, communication and commitment.

RELEVANT PROJECTS

VIA Land Use Policy Support VIA Metropolitan Transit (2012 – 2015)

For VIA Metropolitan Transit (TX), Cambridge Systematics developed policies and strategies to support transit-oriented development (TOD) in the San Antonio region. The objectives of this work were to establish and maintain partnerships between local municipalities and VIA in order to develop transit supportive land use policies and plans and position the region for national competitiveness for Federal transit funding. Work included establishing a vision for the VIA's involvement in land use policy; developing a guide to transit-supportive land use; developing a land use toolkit and implementation plan; and developing an affordable housing strategy and implementation toolkit. The work was coordinated with the City of San Antonio and other local stakeholders.

DKS ASSOCIATES

Today's community leaders must balance investments to ensure their transportation systems serve all members of the community, including those who walk, bike, take transit, drive, and transport goods. In the past, a typical response to congestion was to add travel lanes, which detracts from the livability, health, safety and fiscal well-being of the community. As leaders in multimodal planning, DKS staff members work with communities from the regional scale to neighborhoods to understand their existing transportation systems, help set realistic and measurable goals, identify needs for all users, evaluate and refine alternatives, and develop fiscally responsible and prioritized plans.

During the planning process, we leverage our experience in designing multimodal facilities to maximize success for future implementation. This integrated approach results in a more seamless transition from planning concept to actual implementation

EXPERIENCE, BACKGROUND & QUALIFICATIONS

of strategies and projects that provide tangible benefits to the community. Through our comprehensive and integrated multimodal technologies, DKS staff plan and design safe, convenient and productive transportation networks that reduce driving demands at congested locations and improve walking, biking, and transit options.

RELEVANT PROJECTS

Downtown Transportation Plan, San Antonio, TX City of San Antonio (2011-2012)

The San Antonio Downtown Transportation Plan identified transportation solutions to enhance accessibility for residents and visitors, improve marketability for businesses downtown, improve vehicular mobility, expand transportation options, promote healthy living and improve air quality. DKS staff was part of the team that evaluated the existing downtown transportation infrastructure and land uses, and identified areas for improvement.

As part of the Downtown Transportation Plan, DKS staff was responsible for:

- Developing a street typology that standardizes urban design elements for the downtown to help reach the economic goals of the Mayor's 2020 plan through a balanced system of transportation modes which support economic development;
- Developing short-term and long-term capital project concepts for inclusion in San Antonio's 2012-2017 Bond that bring the liveliness of the Downtown Riverwalk up to the street level and support future growth;
- Developing traffic forecasts to evaluate Bond Program projects and other long-term transportation improvements; and
- Integrating on-going planning and transit agency projects into the plan, including the streetcar alignment.

E.D. HOVEE & COMPANY, LLC

Since 1984, E. D. Hovee & Company, LLC (EDH) has provided economic and development services to public agency, non-profit, and private clients. Services include economic and market research, socioeconomic and carbon footprint impact analysis, economic development and diversification strategies, and assistance with project implementation.

E. D. Hovee specializes in the assessment of value capture from transit oriented development (TOD). The firm has evaluated the economic development nexus with transit service for mixed use development and density, formulating a GIS/parcel-based

EXPERIENCE, BACKGROUND & QUALIFICATIONS

forecast methodology to assess residential and commercial development potential with and without transit investment. Both for in-place streetcar and light rail corridors, the firm has conducted retrospective analysis to quantify actual impacts in terms of rates of new development, valuation, and urban density increases in proximity to station areas as compared with geographies further removed from the transit alignment.

E. D. Hovee has also modeled transportation and economic benefits across a wide range of project applications: for transit modes including conventional bus, BRT, light rail, streetcar, and tram. TOD assessments have been conducted in the San Antonio, Oklahoma City, Los Angeles, Reno, Boise, Portland and Seattle metro areas – including evaluation of carbon footprint savings as compared to the suburban alternative in Portland and Boise.

RELEVANT PROJECTS

San Antonio Streetcar Economic Impact Update & Market Analysis VIA Metropolitan Transit (2011-2014)

Working with SABÉR Research Institute, E. D. Hovee has modeled transportation and economic benefits for proposed streetcar re-introduction in San Antonio, TX. Initial work in 2011 involved a parcel-based GIS assessment of development potential for eight potential downtown streetcar alignments.

In 2014, SABÉR and E.D. Hovee updated the prior streetcar economic impact evaluation for the locally preferred alignment (LPA) of east/west and north/south streetcar lines. The evaluation differentiated impacts for properties within two zones of proximity (or approximately two blocks) to the proposed alignment under no-build, baseline and accelerated scenarios.

The 2014 updated market analysis included a review of current parcel-based development patterns, recent development investment and potential development sites together with benchmarking to regional population and employment forecasts. Stakeholder interviews were conducted with developers, community leaders and those at the forefront of economic development in San Antonio – with the initial 2011 analysis and subsequent 2014 refined LPA evaluation. Also included was comparative case study review of recent TOD experience with streetcar introduction in Portland, Seattle and Tampa.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

STEVEN R. NIVIN, PH.D., LLC

Steven R. Nivin, Ph.D. is an economic consultant based in San Antonio, Texas. His practice focuses on conducting economic research and planning related to regional economic growth and development with particular emphasis on transit-oriented development; the role of arts and culture in economic development; neighborhood and community development; hospitality, tourism, and sporting event impacts; and economic forecasting. He has completed numerous market analyses, economic forecasts, economic development plans, economic and fiscal impact analyses, and cost-benefit studies. Dr. Nivin has been conducting research on various economic development issues for twenty years and is a recognized expert who is frequently asked to speak and provide his expertise to various media. He is also an associate professor of economics at St. Mary's University and director of the SABÉR Research Institute.

RELEVANT PROJECTS

A Cost-Benefit Analysis of the VIA Westside Multimodal Center VIA Metropolitan Transit (2011)

This study provided a cost-benefit analysis of the Westside Multimodal Transit Center near downtown San Antonio. The benefits and costs were measured over the projected twenty-five-year life of the facility. Once the projections to the benefits and costs were complete, three different discount rates were applied to calculate the net benefits so as to test the robustness of the projected net benefits to different economic scenarios. Regardless of the discount rate used, the net benefits were found to be positive.

RJ RIVERA ASSOCIATES INC.

RJ Rivera Associates, Inc. (RJRA) is a non-subsidiary corporation that provides civil, roadway, and traffic engineering, transportation planning, and bilingual public involvement services to government agencies, municipalities, and private organizations. Founded by Rodolfo "Rudy" J. Rivera, PE, in early 2003, the company has grown to include engineers, planners, and public involvement professionals and provides clients with integrated services.

Rudy founded the company on the belief that successful engineering plans and designs integrate community needs and environmental sensitivity. The company and its melting pot of disciplines is a product of this vision. RJRA's philosophy of integration has resulted in a reputation for technical excellence and proven success working with contentious issues and controversial projects. Social media and online surveys within RJRA's public involvement services are examples of how the company utilizes technologies to better engage the community.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

RJRA is more than just a consulting firm; it is a team comprised of highly experienced professionals who bring a thorough understanding of the work involved and key tasks needed to successfully deliver each plan, study, or project.

RELEVANT PROJECTS

South/West Corridor Transit Improvement Plan VIA Metropolitan Transit (2014-2015)

This study determined the benefits, costs, and impacts of implementing high-capacity transit along a 19.9-mile corridor along the western and southern sides of San Antonio. Tasks included developing and implementing a PIP; identifying stakeholders and their issues related to transportation; leading a Technical Advisory Committee; developing an outreach strategy that included bilingual public notices newsletters, media and public relations, social media, e-blasts; and conducting public meetings. Innovative outreach methods such as pushing surveys through social media and visiting VIA transit stations to survey riders at peak travel times proved more successful than traditional public meetings.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

- 2. Describe Respondent's specific experience with public entities clients, especially large municipalities. If Respondent has provided services for the City in the past, identify the name of the project and the department for which Respondent provided those services.*

Our team has extensive experience working with the public sector. Many of the Project Management team members, including John Fregonese, and Alex Steinberger have worked for public planning agencies during their career and understand how crucial it is to complete projects on-budget. We have found that doing this requires a deliberate project management approach that focuses on the deliverables that the client wants, in the time planned and at the cost we have agreed to. Our team understands how to work within large cities, transit agencies, and regions to achieve consensus on a project approach involving multiple city departments or agencies.

Fregonese Associates has worked with large municipalities on comprehensive, corridor, and housing plans throughout the state of Texas including the cities of San Antonio, Austin, and Dallas as well as nationwide in Omaha, Albuquerque, Denver, Chattanooga, Baton Rouge, and Portland. In 2014, Fregonese Associates provided services to the City of San Antonio, Department of Planning and Community Development as the lead consultant for the REnewSA Study: Redevelopment Strategies for Economically Challenged Commercial Corridors and their Trading Areas.

Cambridge Systematics has worked with federal agencies, DOTs and municipalities across the country. They developed the National Highway Institute/National Transit Institute course on Transportation and Land Use as well as best practice toolkits for FHWA. In addition, CS's work with state DOTs has led to integrated land use considerations in transportation decision-making processes, including long-range planning, corridor planning, and project development such as the corridor management handbooks.

DKS Associates is a nationally-recognized transportation planning and engineering firm that has worked with large municipalities, regional governments, and state departments of transportation. In addition, practice leader Jim Daisa has led projects for the City of San Antonio including the 2012 Downtown Transportation Plan (Department of Transportation and Capital Improvements).

EXPERIENCE, BACKGROUND & QUALIFICATIONS

While **E. D. Hovee and Company LLC** has not previously done work directly for the City of San Antonio, the firm has been involved as subconsultant to SABÉR in four project assignments contracted through VIA Metropolitan Transit that have involved coordination with the City:

- Economic impacts of streetcar - 8 alignments (2010-11)
- Tiger III downtown multi-modal center cost-benefit analysis (2011)
- Initial planning for north-south HCT transit (2014)
- Updated economic impact for streetcar LPA (2014)

Steven R. Nivin, Ph.D. LLC has provided economic and fiscal impact studies, cost-benefit analyses, forecasts, market analyses, and economic development and cultural plans for several municipalities, non-profit economic development organizations, and private sector firms. These analyses and planning efforts have focused on regional economic development, including transit-oriented development. While most of this work is focused on the San Antonio area, the firm has completed projects for municipalities around Texas and the United States.

Dr. Nivin has completed numerous analyses for several departments within the City of San Antonio. These projects include economic and fiscal impacts of various economic development projects, forecasts of the local economy, sales tax revenue forecasts, economic impacts of the creative industry, economic impacts of the military and Department of Defense activities, and the economic impact of downtown San Antonio. Additionally, Dr. Nivin served as chief economist and industry development manager for the City of San Antonio from 2001 to 2008.

RJ Rivera Associates Inc. is an SBE, MBE, DBE, and HUB-certified engineering, planning, and public involvement (PI) firm established in 2003, with headquarter in San Antonio and a branch office in Austin, TX. The firm has extensive experience working with numerous public agencies in and around the San Antonio area, and employs dedicated, professional staff specializing in transportation and urban planning, alternatives development, traffic engineering, operational analysis, landscape design, intersection design, drainage design, intelligent transportation systems (ITS), PI, utility and railroad conflict resolution, and development of Plans, Specifications and Estimates (PS&E).

- RJRA has provided similar transportation and public involvement services for the City of San Antonio including those listed below:
- CoSA, Frio City Road from Brazos to W. Malone, 5-Legged Signal Design – Traffic Signal Design and Traffic Control, 2014-2015 (Capital Improvements Management Services [CIMS])

EXPERIENCE, BACKGROUND & QUALIFICATIONS

- CoSA On-Call Civil Engineering Services, 2014-Ongoing (Transportation and Capital Improvements [TCI])
- CoSA HemisFair Park Area Master Plan, 2010-2011 (City of San Antonio HemisFair Park Area Redevelopment Corp.)
- CoSA Pedestrian Mobility and Traffic-Calming Initiatives, Districts 4, 6, & 7, 2009-2010 (CIMS)
- CoSA Left Turn Lanes/Traffic Signal Design-Wiseman Blvd. at Ellison Drive (TCI)

EXPERIENCE, BACKGROUND & QUALIFICATIONS

3. *For each of the components, describe staffing and other resources to be dedicated:*
 - a) *List other resources, including total number of employees, number and location of offices, number and types of equipment available to support this project.*

FREGONESE ASSOCIATES INC.

Fregonese Associates employs 11 full-time employees at the office located in Portland, Oregon. We will support the efforts on this project with all key staff in this proposal as well as additional support staff as needed.

We will use our available software tools — including Envision Tomorrow, ArcGIS, City Engine, Adobe Illustrator, Photoshop, and InDesign — to complete these services. All Fregonese Associates staff proposed for this project have the appropriate software packages for immediate use on this project. Fregonese Associates provides high-quality plotter services to accommodate large-scale printing for project maps and other visualizations. Fregonese Associates also utilizes various communication tools to quickly share and collaborate on project files between team members and clients. For weekly project team meetings, online GoToMeeting meetings are used to visually communicate progress and present interim findings with the team.

CAMBRIDGE SYSTEMATICS

Cambridge Systematics has 232 employees and a total of 11 offices, with one located in Austin, Texas. The staff proposed for this effort are located in Austin, Texas; Bethesda, Maryland; and Cambridge, Massachusetts. Cambridge Systematics' experienced personnel and consultants compose the primary resources required to successfully perform our work. In addition to these staff resources, the equipment and facilities supporting the contract work include offices located in strategic geographic areas throughout the United States; professional libraries; conference facilities; survey design and data collection staff; advanced computer hardware and software; and comprehensive graphics, electronic publication, and multimedia services.

DKS ASSOCIATES

DKS Associates has 200 employees in 9 offices in Oregon, Washington, Florida, California, and Texas. Staff participating in this effort are located in Portland, Sacramento, and Austin.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

E.D. HOVEE & COMPANY, LLC

E. D. Hovee is a small professional services company specializing in economic development consulting services. Based in Vancouver WA, full-time personnel include Eric Hovee (Principal) and Andrea Logue (Research Coordinator) plus part-time personnel for office management support.

In-house economic analysis is typically reliant on ArcGIS for parcel based data together with Excel based forecast modeling. EDH also regularly makes use of proprietary data bases including Nielson/Claritas (demographics), CoStar (real estate), and IMPLAN (economic multiplier) data bases on an as-needed, per-job cost reimbursement basis.

As in the past with similar transit and economic development project assignments in San Antonio, services will be coordinated with Steve Nivin, SABÉR Research Institute.

STEVEN R. NIVIN, PH.D., LLC

Dr. Nivin runs his own sole proprietorship consulting practice, Steven R. Nivin, Ph.D., LLC, and has completed numerous consulting projects focused on transit-oriented development, the impacts of economic development projects, forecasting, and economic development and cultural planning. Steven will provide access to all technical resources at his disposal including ESRI Business Analyst Online, IMPLAN, and proprietary economic and fiscal impact models.

RJ RIVERA ASSOCIATES INC.

RJ RIVERA Associates, Inc. (RJRA) has 27 employees in two offices: Our San Antonio (Headquarters) office, with 21 employees, and an Austin, TX, office with 6 employees. RJRA will support the efforts on this project with local San Antonio staff.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

b) If Respondent is proposing as a team or joint venture or has included sub-contractors, describe the rationale for selecting the team and the extent to which the team, joint ventures and/or sub-contractors have worked together in the past.

Fregonese Associates is excited to lead this multi-disciplinary team comprised of regional and national experts in land use optimization, transportation planning, economic development, and public engagement. At the core of the team are Fregonese Associates and Cambridge Systematics who have collaborated on San Antonio-area projects since 2013. Currently, CS is leading VIA Metropolitan Transit's Long Range Coordinated Transportation Plan (LRCTP) for which FA is the land use lead. Both firms' experience working on this and other VIA projects means that we already have a firm basis for shared project management as well as the local context needed to integrate VIA's LRCTP with the City's Comprehensive Plan. DKS Associates practice lead Jim Daisa rounds out our team's transportation planning expertise with multimodal strategies and context-sensitive design. Jim Daisa and John Fregonese have worked together for over 15 years in Portland, Denver, and the Seattle area.

We are joined by economic development experts E.D. Hovee and Dr. Steven Nivin. EDH and Dr. Nivin comprise a formidable source of economics expertise, particularly where land use and transportation are concerned, and will help develop strategies for transportation corridors and station areas. In addition to working closely with Dr. Nivin on several San Antonio-area projects, E.D. Hovee and John Fregonese have a long history of collaboration in the Portland metro area.

Finally, RJ Rivera Associates Inc. will bring their public involvement expertise and local knowledge to this project. RJRA has strong local connections and will work with FA to engage under-represented groups and foster meaningful discourse in all engagement events. With practice areas that span both transportation planning and public involvement, RJRA will provide staff that have the ideal background for this type of effort. RJRA has also worked extensively with Cambridge Systematics in the San Antonio region and has worked collaboratively as a sub-consultant with CS and Fregonese Associates on VIA-funded projects.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

- c) *Identify the number and professional qualifications (to include licenses, certifications, associations) of staff to be assigned to the project and relevant experience on projects of similar size and scope.*

FREGONESE ASSOCIATES

KEY STAFF - 4

JOHN FREGONESE | STRATEGIC ADVISOR

John has been a planner for 37 years. He has built a reputation for his ability to energize communities around their shared vision. He works with communities to develop prioritized strategies and actions that enable their vision to take shape through an actionable plan. The mark of John's leadership is a plan that is successfully implemented at the city or regional scale and transitions into projects at the community or neighborhood scale. John is known for his work in Portland, where he served as the planning director for five years at Metro, and was the primary author of Metro 2040.

Since founding Fregonese Associates in 1997, John has assembled a track record of successful downtown and small area planning in cities and communities of all sizes across the country. He served as lead consultant for the Beaverton Creekside District Master Plan (Beaverton, Oregon), the Dallas TOD station area planning project (Dallas, Texas), and developed the Mountlake Terrace Town Center Plan, much of which has been implemented to date.

SCOTT FREGONESE | OVERALL TEAM LEAD

As Vice President, Scott is involved in many of the firm's most effective and high-profile projects. He has more than 14 years of experience in land use and transportation planning and policy development. His work and research spans major regional initiatives, public outreach, local planning and policy, downtown plans and implementation strategies. He has a proven record of achievement, and his focus on creative problem-solving and collaboration assures success for clients. Scott's skills in presentations, team building, workshop facilitation, communication and GIS analysis enrich every planning process he manages for Fregonese Associates' projects.

Scott has led numerous comprehensive plans including PLANiTULSA Comprehensive Plan; FUTUREBR, the East Baton Rouge Parish Comprehensive Plan; and forwardDallas! Comprehensive Plan. Most recently, Scott managed Fregonese Associates' role in the City of Olympia's Gateway District Community Renewal Area Process.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

ALEX STEINBERGER | PROJECT MANAGER

Alex is an urban planner with a strong foundation in economics and GIS. His experience in local public finance, urban design and transportation planning allows him to approach projects with an eye for creative, practical solutions. Alex uses these skills to fulfill a broad range of project needs – from site design to fiscal impact analysis. Alex has worked extensively in regional and site-level land-use modeling and brings an eye for practical, implementation-focused strategies to every project. Most recently, he played a lead role in the development of land use and transportation scenarios for Powell Boulevard, an urban state highway in Portland, Oregon.

JULIA REED, ALSA, LEED, AP | URBAN DESIGNER

Julia is an urban designer with 11 years of experience in landscape architecture, site planning, analysis and design. Her skills include development of urban design framework plans, access and transportation planning, open space planning, community/neighborhood analysis and multimodal streetscape design. Julia’s renderings and graphic design products help people visualize change before it happens.

Recently Julia’s work has included re-imagining the six-mile stretch of the Barbur Boulevard corridor through the heart of Southwest Portland as the design lead for the Barbur Concept Plan. The plan identified potential development opportunities, streetscape improvements and recommended changes to City policy and zoning to inform decisions on future high-capacity transit along the corridor.

CAMBRIDGE SYSTEMATICS

KEY STAFF - 3

CHRISTOPHER PORTER | PRINCIPAL

Christopher is Principal of Cambridge Systematics with expertise in transportation and land use relationships, economic development, air quality analysis, and nonmotorized travel. For nearly 20 years, Christopher has provided support to transportation agencies in identifying and applying innovative approaches to state, regional, and corridor-level planning. He is currently leading CS’ work for VIA Metropolitan Transit in San Antonio, Texas, to support local agencies in linking transportation and land use policies to support increased transit ridership and quality of service. He has led economic development analysis work, using both quantitative and qualitative methods, for a variety of transit and highway projects including commuter rail projects in New Hampshire and Chicago. For the FTA he has reviewed transit-supportive land use practices for over 50 projects nationwide applying for New Starts/Small Starts funding. He was lead developer of a National Highway Institute course on transportation and land use which included a lesson on corridor planning and management.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

KELSEY AHERN, PE | TRANSPORTATION PLANNER

Kelsey has 11 years of experience in transportation planning, analysis, engineering, and performance management. Kelsey has led or supported multimodal and mode-specific long-range transportation plans at the state, regional, and local levels. She applies the emerging principles of performance-based planning and has led robust stakeholder and public outreach to support the development of transportation plans consistent with Federal requirements.

STACY COOK, AICP | TRANSPORTATION PLANNER

Stacy is a Transportation Planner for CS with experience in regional and urban transportation planning, with expertise in multimodal transportation and land use planning and coordination. She has applied professional experience in transportation and land use analysis, and technical research and writing. Stacy currently is supporting the development of a Performance Management Guidebook for the Transportation Alternatives Program (TAP) and is completing the development of the 2016 AR and the 2017 MFR, Maryland's annual performance reports on the implementation of the Maryland Transportation Plan and the Consolidated Transportation Program. For VIA Metropolitan Transit of San Antonio, Stacy has recently completed work on a number of projects, including supporting the development of transit supportive land use (TSLU) policy toolkit and guidebook, supporting a BRT corridor, and leading the development of a Strategic Housing Toolkit for High Capacity Transit Corridors that documents best practices for preserving and producing affordable housing in transit communities. Currently, Ms. Cook is leading the development of the VIA TSLU Strategic Plan, (part of the VIA long range plan update), which includes prioritization of pedestrian improvements, and the development of six TOD Concept plans for the San Antonio which include transit, bicycle and pedestrian circulation maps. She is also leading a team that is developing a vision plan for an area surrounding VIA's new Central Plaza, know as VIA Villa. She is also supporting the development of the Virginia Multimodal Transportation Plan. Stacy has supported the FTA in the review of Small Start grant applications, focusing on the relationship of land use, affordable housing, and transit.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

DKS ASSOCIATES

KEY STAFF - 3

JIM DAISA, PE | PRACTICE LEADER

Jim brings national experience in transportation planning and traffic engineering. His experience includes developing policies and implementation strategies, preparing Complete Streets policies, plans and designs; developing pedestrian and bicycle system plans and safety improvements; and preparing feasibility studies and long-range plans for regional public transportation systems, including LRT, BRT, streetcar, and commuter rail. In addition, Jim excels at performing parking supply and demand studies, developing parking financing strategies, and creating parking management plans. Jim works with multidisciplinary teams alongside agencies and stakeholders to devise transportation solutions for urban areas undergoing change or revitalization. He structures financing plans to meet the needs and resources of communities.

CHRIS MACIEJEWSKI, PE, PTOE | PRINCIPAL

Chris has 15 years of experience working on various transportation planning and engineering projects including transportation system planning, travel demand forecasting, capacity and operations analysis, multimodal analysis, neighborhood traffic calming, circulation studies, intersection safety improvement evaluations, freight mobility analysis, and conceptual design. Chris has experience leading transportation studies that include coordination between several public agencies, involvement with the general public, and presentations to elected officials. He co-led multiple efforts to create multi-modal/mixed-used areas in key centers that balance the mobility needs of state highways with the prioritization of walking, biking, and transit to support vibrant urban centers.

REAH FLISAKOWSKI, PE | SENIOR PROJECT MANAGER

Reah has provided transportation engineering and planning services to public agencies throughout the Pacific Northwest. Her project experience includes citywide multi-modal system plans, urban corridor complete street studies, pedestrian/bicycle/trail master plans, high capacity transit corridor studies, and urban revitalization plans. As project manager, Reah has evaluated complex transportation environments and developed cost-effective improvement strategies. She specializes in balancing the needs of all transportation modes with many of her plans recommending innovative pedestrian, bicycle, and transit improvements that enhance a community's livability and vitality. She has presented transportation issues and findings to the public through community open houses, citizen advisory meetings, and planning commission/ city council hearings.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

E.D. HOVEE & COMPANY, LLC

KEY STAFF - 2

ERIC HOVEE | LEAD FOR PLANNED ACTION/EIS

Eric formed the economic and development consulting practice E. D. Hovee & Company, LLC in 1984. He conducts economic and market research, facilitates community and business assessments, prepares economic development and impact evaluations, and assists in project implementation. Prior to consulting, Eric worked for the City of Vancouver, WA, as Economic Development Manager and for the City of Portland, OR, as Economic Development Coordinator. He received his undergraduate education in economics and urban studies from the University of Pennsylvania with subsequent graduate courses at Portland State University.

Eric has documented the development experience associated with Portland, Oregon's westside streetcar and Blue Line MAX systems. He has developed predictive models for successful FTA Small Starts funding of Portland's Eastside Loop, to four other potential streetcar corridors in Portland, and to planned streetcar projects in Boise, Reno, Anaheim, Santa Ana (CA), San Antonio, and Oklahoma City. Eric also has conducted case study and development analysis for a Clark County (WA) proposed BRT corridor, evaluated value capture for Portland Transit Mall redesign, and completed case study analysis for an FTA funded Practitioners Guide to Transit Supportive Development through of the New Jersey Institute of Technology.

ANDREA LOGUE | RESEARCH COORDINATOR

Andrea has 15 years of experience specializing in data analysis, research, and technical support on behalf of E. D. Hovee for projects ranging from development feasibility assessments and market analyses to socioeconomic reports. She has expertise in database and geographic information system (GIS) software as analysis tools – including use of GIS/ tax assessors' databases for redevelopment assessments. She is responsible for data research and analysis and management of document preparation.

Relevant project experience includes assessment of development potential of properties proximate to the Oklahoma City Modern Streetcar Project and the Santa Ana-Garden Grove Fixed Guideway Project; local improvement and urban renewal district economic benefits for a proposed streetcar in downtown Boise, ID; economic impact analysis for eight potential streetcar alignments in downtown San Antonio, TX; economic development analysis for anticipated value of development, incremental property and sales tax revenue associated with construction of the proposed Virginia Streetcar transit corridor in Reno, NV; and assessment of local economic development potential and funding sources associated with four future planned streetcar corridors in Portland, OR.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

STEVEN R. NIVIN, PH.D., LLC

KEY STAFF - 1

STEVEN NIVIN, PH.D. | ECONOMIC CONSULTANT

Steve Nivin is an associate professor of economics at St. Mary's University. At the university he also holds the position of director and chief economist of the SABÉR Institute – a think tank focused on the research of issues related to the development of regional economies. He teaches urban economics, cost-benefit analysis, intermediate macroeconomics, and money and banking. His academic research currently focuses on the use of complexity economics to understand the functioning of regional economies, the role of arts and culture in economic development, and other issues related to regional economic development. Dr. Nivin also runs his own consulting practice, Steven R. Nivin, Ph.D., LLC, and has completed numerous consulting projects focused on transit-oriented development, the impacts of economic development projects, forecasting, and economic development and cultural planning. He is often quoted in the print media and regularly appears on radio and television programs to discuss various economic issues.

Before coming to these positions, Dr. Nivin served as chief economist and industry development manager for the City of San Antonio. He also worked as an economist at USAA and Blue Cross Blue Shield of Texas. He received his Ph.D. and M.A. in Political Economy from the University of Texas at Dallas and his B.A. in Economics from Austin College.

RJ RIVERA ASSOCIATES, INC.

KEY STAFF - 1

GUILLERMO "WILLIAM" RAMIREZ-LONG | PUBLIC OUTREACH CONSULTANT

Mr. Ramirez-Long has more than 15 years of experience in community relations, facilitation, and event planning, and more than 9 years of experience conducting NEPA-compliant public involvement (PI). He specializes in the development, management, and implementation of NEPA-compliant PI programs, including scheduling, agency coordination, planning, and conducting PI activities. He has extensive experience with outreach to low-income/minority/Environment Justice populations, coordinating bilingual communications, developing informational materials, exhibits, public service announcements, media packets, public contact lists, infographics, legal notices, placing display ads, creating websites, and social network sites. He has executed numerous public meetings and hearings, MAPOs, and documented the PI process and public comments through summary reports.

EXPERIENCE, BACKGROUND & QUALIFICATIONS

In addition to being responsible for RJRA's Public Involvement Department, William is responsible for successfully developing and recruiting new business opportunities. In his efforts to further these goals, he was selected to participate in the Alex Briseño Leadership Development Program (ABLDP), and most recently has served on the ABLDP Steering Committee. As Chair, William intends to continue to identify ways to enhance the leadership curriculum and act as an advocate for the ABLDP, as well as the San Antonio Hispanic Chamber of Commerce.

4. *State the primary work assignment and the percentage of time key personnel will devote to the project if awarded the contract.*

FREGONESE ASSOCIATES

- John Fregonese, Strategic Advisor - 10%
- Scott Fregonese, Overall Team Lead - 25%
- Alex Steinberger, Project Manager - 40%
- Julia Reed, ALSA LEED AP, Urban Designer - 30%

CAMBRIDGE SYSTEMATICS

- Christopher Porter - 10%
- Kelsey Ahern - 15%
- Stacy Cook - 15%

DKS ASSOCIATES

- Jim Daisa, PE - 5%
- Chris Maciejewski - 5%
- Reah Flisakowski - 5%

E.D. HOVEE & COMPANY, LLC

- Eric Hovee, Lead for Planned Action/EIS - 10%
- Andrea Logue - 5%

STEVEN R. NIVIN, PH.D., LLC

- Steven Nivin, Economic Consultant - 10%

RJ RIVERA ASSOCIATES, INC.

- Guillermo "William" Ramirez-Long - 20%

EXPERIENCE, BACKGROUND & QUALIFICATIONS

5. Additional Information. Identify any additional skills, experiences, qualifications, and/or other relevant information about the Respondent's qualifications.

We believe our team is uniquely positioned to provide the City of San Antonio with the services outlined in the RFQ. Our team includes practitioners with experience developing similar spatial models for other public sector clients. Fregonese Associates has collaborated with VIA and CoSA staff on the development of our open source land use model and a version, calibrated for San Antonio, already exists off-the-shelf. This will allow our team to focus on the analysis rather the development of a model.

Some of the technical analysis requested in the RFQ deals with the travel behavior impacts of future land use and infrastructure changes. Fregonese Associates, in partnership with lead transportation researchers, has developed a Household 7D Travel Model which can be run with minimal effort in tandem with land use scenario modeling. This eliminates the need for costly and time-consuming 4-step transportation models in this analysis. Our model has been peer reviewed and is used by municipalities, students and researchers all over the country.

Our experience working for both VIA and CoSA on major on-going planning efforts in the region gives us unique qualifications for this project. Unlike other proposers, we already have the context and background to begin making informed strategic decisions and will need only minimal time for briefing on SA Tomorrow or VIA Vision 2040. Moreover, our experiencing building implementation-ready plans and understanding of market realities and the breadth of tools that are available to the public sector, we bring a right and varied skill set to the City of San Antonio.

PROPOSED PLAN

RFQ ATTACHMENT A, PART THREE

PROPOSED PLAN

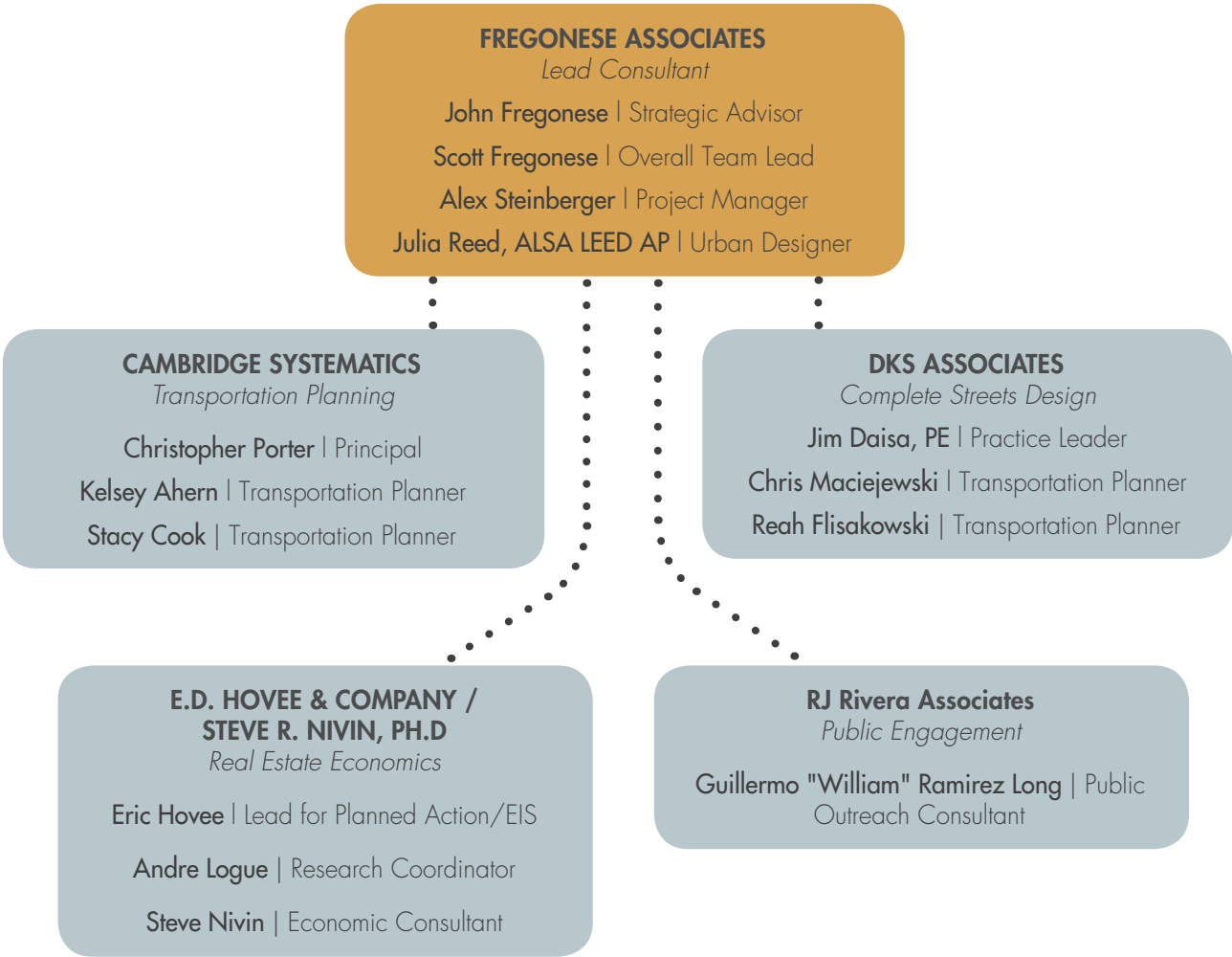
Prepare and submit the following items:

1. Project Management Plan - Describe the approach and methodology to be used for the study. Describe the data to be identified and analyzed for each component of the study. Include proposed budget, organization chart to undertake the project, and the proposed deliverables.
2. Include any additional recommended activities/tasks not included in Scope of Services which Consultant may recommend be undertaken to ensure the reliability of the study.
3. Identify any unique problems perceived by Consultant to achieve scope of services.

PROPOSED PLAN

1. *Project Management Plan - Describe the approach and methodology to be used for the study. Describe the data to be identified and analyzed for each component of the study. Include proposed budget, organization chart to undertake the project, and the proposed deliverables.*

Fregonese Associates (FA) has a solid reputation for quality work, delivered on-time and within budget. We do this through the assignment of highly experienced strategic advisory staff and motivated project managers, coupled with dynamic project teams. The firm president and at least one principal share the role of guiding the projects and engaging the clients through work sessions and meetings. For the Corridor Land Use Planning Study we have also retained a dynamic team of local and national specialists in the fields of land use planning, economics, and transportation. The team members that we have put forward for this project are uniquely suited to provide the City of San Antonio with a nuanced technical approach, inclusive public involvement, and practical solutions that will move the SA Tomorrow Comprehensive Plan toward implementation.



PROPOSED PLAN

JOHN FREGONESE – STRATEGIC ADVISOR

John will serve as the team’s strategic advisor and will be engaged in all aspects of the project. John is easily accessible to his clients and is enthusiastic about bringing his team’s knowledge and expertise to work with the City of San Antonio. He is committed to leading plans that get implemented and are grounded in the political, social, environmental, and market realities of a place. He has recently led successful projects in Dallas, Austin, and San Antonio and enjoys working in with Texan communities.

SCOTT FREGONESE – TEAM LEAD

As overall team lead, Scott will be instrumental in project decisions and communications and help guide the Corridor Land Use Study from project kick-off to plan adoption. Scott will bring his 15+ years of experience in land use planning and public outreach to the project and will manage digital and in-person engagement efforts. In 2012, Scott acted as project manager for the Dallas TOD Plan and is currently overseeing the development of Comprehensive Plans in Irving, TX and Albuquerque, NM.

ALEX STEINBERGER – PROJECT MANAGER

As the project manager, Alex will be responsible for primary project coordination, including maintaining client and production schedules, and coordinating products between team members. He will be available to respond to client questions and to quickly relay questions and requests to other team members. Alex has a background in real estate finance, and strong qualitative and quantitative skills. At Fregonese Associates, Alex is a leader in developing and applying sophisticated analytical/spatial tools to help solve complex problems. He expertly applies these tools to communicate complex urban, technical and economic issues at a variety of scales to the general public and decision makers.

JULIA REED – URBAN DESIGNER

Julia is an experienced urban designer with a background in landscape architecture, 3D modeling and sustainable development. She has over ten years of experience in planning and design, and has worked on projects involving a range of scales, from single lots to downtowns and multi-county regions. Julia’s illustrations, photo-simulations and 3D models help people visualize change before it happens. Julia will manage the development of photo-realistic renderings for the Corridor Land Use study and will work closely with technical staff to ensure that these renderings reflect community preferences and market realities.

PROPOSED PLAN

APPROACH TO SCOPE OF SERVICES

We have outlined our proposed approach and data needs for each major component in the scope of services listed in the RFQ. Through our work with VIA on their Long Range Comprehensive Transit Plan (LRCTP), we are uniquely positioned as a team to provide the requested deliverables on time and within the allotted budget. To the greatest extent possible, we will leverage recently completed products of both the LRCTP and the SA Tomorrow Comprehensive Plan to help expedite deliverables and bridge the two planning efforts.

The FA team seeks to produce actionable strategies and tools that won't simply sit on the shelf. To that end, we propose that a major deliverable resulting from this effort should be a visually appealing and concise Action Plan to move implementation forward. In the following scope of work, we have referenced this document and how we will use it to summarize the findings of each task.

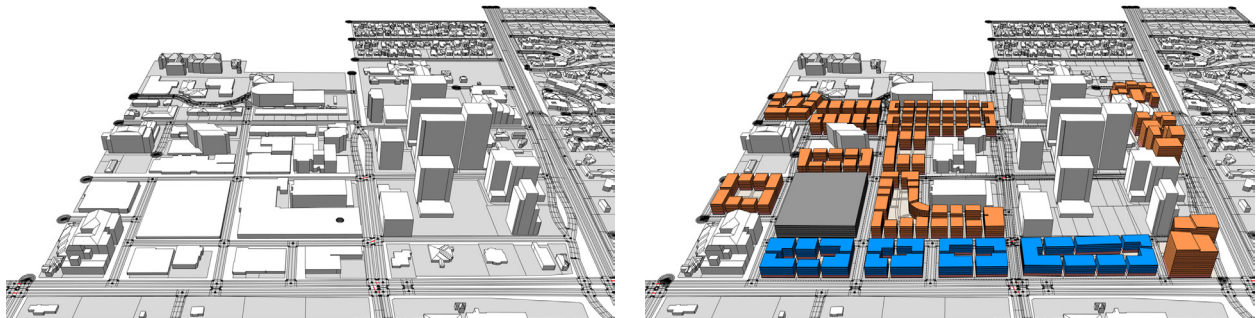
TASK 1 – SCENARIO PLANNING FOR LAND USE OPTIMIZATION

In this task, the Fregonese Associates team will develop a GIS-based land use profile for each VIA Vision 2040 corridor using the Envision Tomorrow suite of open source planning tools. The existing land use patterns that exist along major thoroughfares in San Antonio range from walkable urban districts – Museum Reach, Pearl Brewery, and Downtown – to fully auto oriented areas – Stone Oak, Hill Country Village, and North Star Mall. Developing optimized land use profiles for each of the identified corridors will help provide much needed context for subsequent station area planning efforts in task 2. In addition, these profiles will help CoSA and the consultant team identify, at a high level, the major missing characteristics – infrastructure, real estate market, or otherwise – that will be the key focus for optimizing each corridor.

The Fregonese Associates team sees this task as an opportunity to integrate VIA Vision 2040 with SA Tomorrow's implementation. As the lead authors of the Guide to Transit Supportive Land Use, we have an in-depth understanding of its guiding principles and how they relate to VIA Vision 2040. Recently, Fregonese Associates and Cambridge systematics completed a regional market analysis and development capacity scenario for VIA's proposed transit corridors using Envision Tomorrow. In order to promote efficiency and expediency, we propose to use this capacity scenario as the starting point for the corridor profiles. We will work with CoSA and VIA staff to refine the scenario and make adjustments as needed. In addition, an updated library of Envision Tomorrow prototype buildings was created to reflect guiding principles from the Transit Supportive Land Use Guide.

PROPOSED PLAN

In addition to GIS-based scenarios, we will produce a summary presentation of the resulting land use concepts/scenarios as well as a detailed technical memorandum. We also propose including up to three (3) birds-eye renderings using ESRI's City Engine visualization engine. These visualizations will not be photo-realistic, but will provide a sense for the visual impact and intensity of future land use changes within the corridors relative to the rest of the city.



City Engine development visualizations in Preston Center, Dallas, TX

As we develop the corridor profiles, our team of land use, real estate, zoning, and transportation experts will ensure that the following factors are incorporated:

MARKET FEASIBILITY

Fregonese Associates will develop market-feasible scenarios that take into account near-term achievable rents and construction costs in each corridor. A regional market analysis recently completed by FA for VIA Vision 2040, will be validated by our real estate economics team: Eric Hovee and Dr. Steven Nivin. This rigorous analysis will ensure that the proposed corridor land use profiles are financially feasible in the near to medium term.

We will also leverage VIA's MyLink database of infrastructure conditions for over 7,000 transit stops throughout the region to identify potential gaps in key pedestrian and transit-supportive infrastructure. In addition, Jim Daisa of DKS Associates will apply his "complete streets" expertise to identify the key capital investments required in each corridor to bring the proposed land use profile to fruition.

FINANCIAL FEASIBILITY

Once the gaps in key pedestrian and transit-supportive infrastructure are identified, Cambridge Systematics will lead the estimation of capital and O&M costs to make the improvements identified in each corridor profile. CS will work with Fregonese Associates and CoSA to identify local cost data and will use their library of national

PROPOSED PLAN

costs where local data does not exist. CS will then establish a baseline infrastructure scenario that quantifies the capital and O&M costs to continue to maintain each corridor assuming continued auto-oriented development patterns. Finally, CS apply cost information to the improvements needed to realize the “optimized” land use profile to determine the difference in one-time and on-going costs needed in both scenarios.

EQUITY IMPACTS

In order to understand the equity impacts of the proposed land use scenarios, we need to first understand the need for different housing types at a range of price-points within each corridor and city-wide. We propose the use of the Envision Tomorrow Balanced Housing Model which is used to analyze a community’s existing housing supply, including the matches and mismatches by age, household income and tenure (rental or owner-occupied). It is also used to conduct a capacity analysis of development potential and a forecast of future age and income cohorts.



Balanced Housing analysis – Dallas Neighborhoods Plus, Dallas, TX

We will use Envision Tomorrow’s building-based metrics to understand the wage, income, and housing cost implications of each corridor’s land use scenario as they relate to the housing need established by the Balanced Housing Model. Our economics team will help to further this discussion by identifying the investments that the public and private sectors will need to make to meet the housing affordability targets we identify in our modeling work.

PROPOSED PLAN

Transit supportive land uses favors amenities that serve pedestrians, including those with physical limitations and other disabilities. Moreover, a land use profile that is more dense, and served by high capacity transit can have a significant impact on the quality of life of people with physical limitations and/or other disabilities because it increases their access to amenities such as medical facilities, schools, jobs, grocery stores and banks. Our transportation and complete streets team will ensure that existing infrastructure conditions, proposed capital improvements, and future land use patterns will address the needs of these populations by apply national best practices to our proposed land use profiles. In our scenarios we will also track key accessibility metrics such as non-auto trips, daily metabolic equivalents (METs) from active transportation, intersection density, and sidewalk a quality/availability.

ENVIRONMENTAL IMPACTS

How future growth is accommodated in San Antonio – and how investment in key transit corridors may guide that growth – will have major implications for the environmental health and sustainability of the region. Using Envision Tomorrow’s built-in water, energy use, and storm water modeling tools, our team can provide CoSA with a range of metrics that will help us better understand the sustainability impacts of the proposed corridor profiles. Fregonese Associates recently completed a similar analysis in Austin for their CodeNext development code update that used localized storm water modeling information to map the impact of green features in buildings and the effect proposed zone changes might have on runoff and storm water capture.

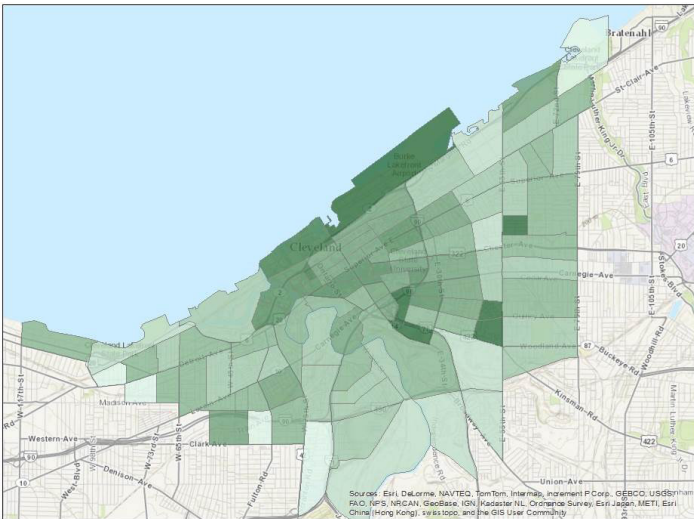
COMMUNITY ACCEPTANCE

As corridor profiles are being developed, our team will also track local plans and neighborhood boundaries to provide the City with a list of potentially impacted stakeholders. This review will include a compatibility analysis of each scenario with overlapping local and neighborhood plans to identify potential conflicts.

IMPACTS ON LOCAL AND REGIONAL MULTIMODAL TRAFFIC PATTERNS

In order to assess the potential travel impacts of each corridor’s “optimized” land use scenario, FA proposes the use of Envision Tomorrow’s Household 7D model. This model, developed by leading transportation scholar Reid Ewing, estimates the relationship between travel behavior and several key demographic and built environment characteristics. Using this tool, we will be able to efficiently summarize the mode split and per capita VMT impacts of land use changes in each corridor without the need for a cumbersome and time-consuming 4-step travel demand model.

PROPOSED PLAN



Envision Tomorrow Household 7D Model – Future walk trips per household

For the proposed land use profile's effects on "trip chaining", Cambridge Systematics will work with FA to measure internal trip capture within each corridor and potentially, sub geographies within each corridor. There is a body of literature that links reduced "trip chaining" and increased "park once" behavior when a mix of housing, service, and retail destinations are in close proximity to one another.

POLICY NEEDS

Significant work in the arena of zoning and incentive programs has already been done as part of SA Tomorrow and VIA Vision 2040. In order to identify the policy changes required to realize each corridor land use profile, we will first need to reconcile the efforts completed to-date by both VIA and CoSA. As members of the VIA Vision 2040 effort, the FA team has an in-depth understanding of the zoning and incentive-related work done in that arena. We will work closely with CoSA and the MIG-led consultant team for SA Tomorrow to synthesize these bodies of work.

For zoning considerations, we will leverage Envision Tomorrow's Return on Investment (ROI) model to help us understand the implications of potential zoning changes (including development code and overlay districts) to housing affordability, development feasibility, environmental performance, and transit-supportive land use. We will apply the tools and methodology developed as part of the City of Austin's CodeNext development code update including building-level zoning analysis and on-the-fly 3D visualization tools. In addition, our team of local and national economics experts Dr. Steven Nivin and Eric Hovee will provide useful insight into incentives programs and other economic policies that the City may employ to ensure implementation of the proposed land use scenarios.

PROPOSED PLAN

TASK 2 – CORRIDOR AND STATION AREA PLANNING

Corridor and station area planning will take the results of task 1 and apply them to individual station areas in the form of actionable strategies. This task will provide an opportunity to ground-truth assumptions and test potential policy changes locally in areas with varying urban form and market conditions. In order to maintain continuity between corridor and station area scenarios, the FA team will continue the use of Envision Tomorrow as our primary scenario planning tool.

ASSESSMENT OF CORRIDOR-WIDE STRATEGIES

The FA team will provide a detailed assessment of the strategies developed as part of task 1, for inclusion in the Action Plan and organized under the following topic areas:

- Multimodal infrastructure improvement recommendations: Safe pedestrian and bicycle access to the transit stops is a critical component of successful transit planning. We will identify the type, cost, location, and level of priority for each recommendation as well as the agencies and entities that may fund and implement the proposed investment.
- Market-supportive zoning changes: The land use scenarios will provide a clear comparison of the performance of the current zoning versus alternative zoning ideas. Using these analyses, as well as the guidance of the project team, FA will prepare recommendations for changes to key zones within the study area. Examples of the types of recommendations are changes to specific standards, such as use restrictions, site development regulations and parking requirements.
- Incentive and financing tool recommendations: Transit-oriented development will be a departure from the current land uses along the majority of the corridors. Enticing developers to invest will likely take more than just zoning changes. FA has experience using scenarios to test the effectiveness of specific real estate financial tools and incentive programs. Based on the scenario evaluation and the building-level testing of specific gap financing options, FA will work with Dr. Steve Nivin and Eric Hovee to recommend a range of incentives and tools that the city can pursue to ensure the desired project development occurs.

As we organize the corridor-level strategies, we will leverage our team of national experts to incorporate case studies to help guide implementation of projects within each of the above topic areas. We will also produce a Recommendation and Action Item Matrix that will serve as a road map for city-wide prioritization of transit-supportive capital improvements. With the Recommendation and Action Item Matrix, we aim to create a concise and useful document that not only lays out potential policy and investment strategies, but also the relevant public or private entities the city should engage to implement each recommendation.

PROPOSED PLAN

LEVEL 1 STATION AREA IDENTIFICATION

As part of our work with VIA, much of the FA team has been party to the assignment of station area typologies to specific station areas within the region. This means that we will have a measured and validated methodology for assigning typologies prepared by the time this task is set to begin. However, the nature of station area typologies is that they can change over time as the urban form and real estate markets in certain areas change. We will work with CoSA and VIA staff and use value-added datasets such as our urban form composite score and regional market analysis to revisit the typology assignment that occurred as part of VIA Vision 2040. This reexamination will be based not only on how the station areas function today, but how we think they may function in the future based on the corridor land use profiles developed in task 1.

FA has access to a wealth of existing conditions data for the entire San Antonio region and will work to integrate this information into a set of existing conditions profiles for each station area. In addition to the information contained in the matrix of existing conditions provided by DPCD and VIA, FA will provide the following for each station area:

- Existing achievable rents and sales prices (multifamily, single family, retail, office)
- Parcelization and development readiness
- Urban form composite score

LEVEL 2 STATION AREA CONCEPTS

The FA team will work with CoSA and VIA staff to identify up to twelve (12) station areas for further study. FA proposes selecting a set of station areas that are diverse not only in their location in various corridors, but also in terms of their urban form and real estate market attributes.

We will utilize Envision Tomorrow to develop optimized parcel-specific land use refinements to the corridor-level scenarios developed in task 1. These concepts will provide a real-world pilot test of the transit supportive policies and infrastructure improvements identified in previous tasks. Our transportation and complete streets team will work to provide general infrastructure recommendations for each station including locations for pedestrian crossings, sidewalk and streetscape improvements and traffic calming measures.

Building upon the work done in task 1 and linking directly to the Action Plan, we will produce station area concept plans that cover the topic areas of land use, infrastructure, zoning, incentives, and affordable housing. Included in each of the up to twelve (12) concept plans will be one (1) photo-realistic rendering showing current conditions and potential future land uses and changes to the public right of way.

PROPOSED PLAN

LEVEL 3 STATION AREA PLANS

Level 3 station area plans are our chance to delve deeper into the near term development and investment potential for up to six (6) station areas served by high capacity transit (HCT). A wealth of academic research exists to suggest a strong link between frequent transit access and increases in real estate value. The FA team will work with CoSA and VIA to identify station areas that exhibit a range of urban form and market conditions. Using the corridor-level land use profiles developed in task 1, we will further refine the station area future land uses based on the presence of HCT.

In addition to specific infrastructure investments, policy changes, and urban design guidelines, the level 3 station area plans will focus specifically on parcel-level ownership and near term development opportunities. As part of the scenario analysis, our team will identify up to three (2) near term catalyst development sites within each level 3 station area. In addition to identifying catalyst sites, our real estate economics team will develop a stack of financial strategies and tools to position CoSA and/or VIA to enter into a public-private partnership or other mutually beneficial arrangement with the identified land owners. The above analysis will include up to two (2) photo-realistic renderings – one for each catalyst site – within each station area. The resulting renderings will depict near term market feasible development along with prioritized public-realm improvements and HCT.



Before/after rendering of Vickery Meadow mixed use library project – Dallas, TX

PROPOSED PLAN

TASK 3 – PUBLIC ENGAGEMENT

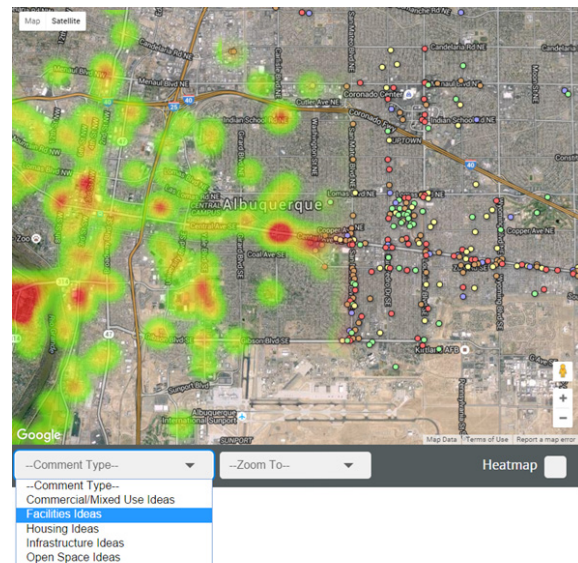
The foundation of a great plan is one that is built on the support of the public and key stakeholders and will be adopted by decision makers. Our experience locally and across the nation uniquely positions our team to understand the key issues, and to create outreach strategies that engage all participants and decision makers in a meaningful way that results in an action-oriented plan. This includes workshops, interviews and focus groups, targeted media outreach, and online public involvement.

We also want to ensure that this effort remains closely tied to VIA Vision 2040 and SA Tomorrow both in its products and its outreach. We will work closely with both project teams to respect their outreach schedules and, wherever possible, hold outreach events in conjunction with both ongoing projects.

The FA team will prepare an engagement plan that outlines the types, timing, and amount of engagement for each task. Fregonese Associates is a Hispanic-Owned Business and we have internal Spanish speaking and writing capability. We have also retained RJ Rivera Associates who can assist with Spanish language translation of online and live public engagement efforts. Our team is skilled at producing material in many languages, and conducting public meetings where several languages are spoken, and different cultural norms are present. We recommend the following public engagement components to be included as part of the Corridor Land Use Study process:

CROWD-SOURCED CORRIDOR WORKSHOPS

As part of our engagement plan, we envision three major touch points with the general public. The first touch point should occur at the beginning of the process as we are exploring corridor land use profiles and “optimized” land use scenarios. We will develop an online google maps based comment tool that allows users to identify areas that are deficient in transit supportive infrastructure, amenities, or other key built environment characteristics. Users will be able to select from a list of categories and provide customized comments for each location. We will embed this mapping tool in the existing SA Tomorrow and/



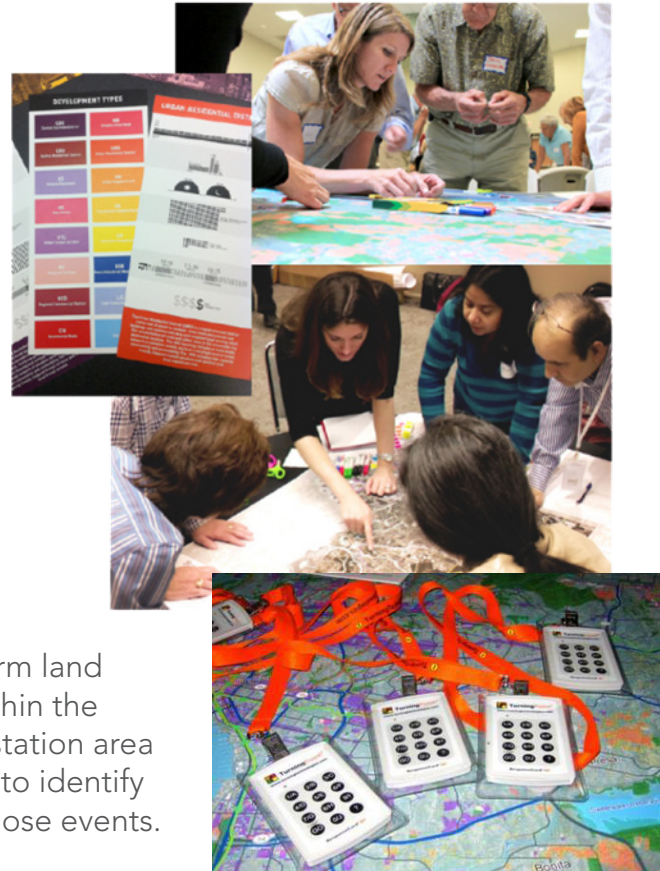
Public comment tool – Albuquerque Comprehensive Plan

PROPOSED PLAN

or VIA Vision 2040 websites where users can provide input or simply view responses left by other participants. Once the comment period has closed, we can use this geo-spatial data to perform robust analysis on areas of public concern within each corridor. In addition, we will also produce a paper map version of this exercise for use in stakeholder meetings, public events, or grass roots outreach.

STATION AREA WORKSHOPS

We propose that the second major touch point should occur in task 2 as we begin to develop level 2 or level 3 station area concepts/plans. A benefit of small area workshops is to better understand community values of nearby residents, what is important to preserve or enhance, and identifying opportunities for change. These engaging workshops typically include a map-based exercise and audience instant-polling. Information gathered at the station area workshops will inform and help shape the future scenarios and generate initial development proposal ideas that feed into the short-term land use analysis and investment strategies within the Action Plan. We propose up to three (3) station area workshops and with work with CoSA staff to identify the appropriate timing and location for those events.



OPEN HOUSE

Our final public touch point will be a public open house to review draft level 2 and level 3 scenarios, obtain input on the various photo-realistic renderings, and obtaining input on the draft and final Action Plan. We will create a fun and informative event program to keep the public informed of key issues, decisions and project milestones.

STAKEHOLDER FOCUS GROUPS

At various points throughout the project, we will be able to use the map-based exercises developed for corridor and station area planning to gather input from smaller targeted stakeholder groups. We will work with CoSA and RJ Rivera Associates to identify key groups and set up meetings to gather valuable input in a small-group setting.

PROPOSED PLAN

SOCIAL MEDIA

In addition to direct interaction with the public, social media platforms such as Facebook, Twitter, and Instagram have been very effective tools in keeping the public informed throughout plan development and encouraging participation particularly to younger audiences.

GRASS ROOTS OUTREACH

Going to people where they are and working with local organizations or agencies will be important in adequately reaching different neighborhoods, cultures, demographic groups, and communities within San Antonio. We suggest involvement at public events during the SA Tomorrow and VIA Vision 2040 processes, as well as booths at local cultural events with raffle activities and prizes. Our local partners, RJ Rivera Associates, will provide valuable connections and insight into local organizations and agencies and build the team's capacity to reach diverse communities.

DELIVERABLES

TASK 1

- Optimized land use concepts / scenarios (ESRI Geodatabase)
- Database of proposed capital projects (ESRI Geodatabase)
- Land use concepts summary presentation (Microsoft Powerpoint)
- Up to three (3) birds-eye corridor visualizations (Google Earth KMZ / JPEG)
- Technical memorandum (Microsoft Word)

TASK 2

- Optimized land use concepts / scenarios (ESRI Geodatabase)
- Database of proposed capital projects (ESRI Geodatabase)
- Recommendation and Action Item Matrix (Microsoft Word / Excel)
- Up to twelve (12) level 2 station area concepts (Adobe Illustrator)
- Up to twelve (12) photo-realistic renderings of level 2 station area concepts (Microsoft Powerpoint)
- Up to six (6) level 3 station area plans (Adobe Illustrator)
- Up to twelve (12) photo-realistic renderings of level 3 station area plans (Microsoft Powerpoint)
- Technical memorandum (Microsoft Word)
- Action Plan Document (Adobe Indesign / Adobe Acrobat)

PROPOSED PLAN

TASK 3

- Engagement plan
- Google map-based online engagement tool
- Up to three (3) station area workshops
- One (1) public open house

PROPOSED BUDGET

The methodology and scope detailed in this proposed plan can be accomplished for the budgeted \$250,000.

2. *Include any additional recommended activities/tasks not included in Scope of Services which Consultant may recommend be undertaken to ensure the reliability of the study.*

ACTION PLAN

In addition to the scope of services listed in the RFQ, the FA team proposes to produce a visually appealing, concise, and functional Action Plan. While a final document was not explicitly requested, we feel strongly that a concise summary of the work completed will help establish a road map for the City as it moves forward in the implementation of the SA Tomorrow plan. In our work across the country, we have found it useful to develop a separate strategy document that details the priority actions to be taken within the first five years of adoption.

Fregonese Associates are experts at synthesizing complex information into succinct, illustrative plans accessible to the general public. We have a strong graphics team that can work with the City to develop the look and feel the City is attempting to achieve. Many will access the plan online through smart phones and tablets. We will ensure that it is accessible electronically, and in a variety of formats.



PROPOSED PLAN

ENVISION TOMORROW TRAINING

Building internal expertise among key CoSA and VIA staff on the use of ET will be key to successfully deploying it after the initial contract period. While we have held various trainings with City and VIA staff in San Antonio since 2014, we also understand that staffing at both agencies has changed in the interim. This also means that we have already established a core group of ET users at the City, VIA, and UTSA which continues to grow.

Practical application of ET to investigate real, local issues is the best way for users to learn. As such, we propose two (2) half day training sessions late in the project schedule to allow City and VIA staff the chance to focus on solving specific issues using calibrated data for station areas. We encourage a broad audience for these trainings across local universities and other agencies such as SAHA and SAWS.

A wealth of information about ET, how it functions, as well as helpful user guides and videos are also available on our Envision Tomorrow website (www.EnvisionTomorrow.org). Clients can gain access to the latest install files and spreadsheet models for free on this website.

3. Identify any unique problems perceived by Consultant to achieve scope of services.

PROJECT SCHEDULES

With two concurrent planning projects closely related to the Corridor Land Use study, it will be important to maintain clear communication regarding schedules and the timing of public events. Special attention will have to be paid to developing a public engagement plan that works with SA Tomorrow and VIA Vision 2040 while allowing adequate time for outreach materials to be produced.

TECHNICAL PROJECTS OFTEN RUN INTO TECHNICAL ISSUES

With a budget of \$250,000 the importance of data availability and quality are key. If the team has to spend a great deal of time searching for, cleaning, and even creating data sources this can add significant time and cost to a project. Our approach is to understand data needs at the outset, and work together find efficiencies to stay under budget. We have made every effort to leverage our involvement in other recent and on-going planning projects to help mitigate this issue.

CONTRACTS DISCLOSURE FORM

* = Required fields



City of San Antonio Contracts Disclosure Form

Office of the
City Clerk

Please fill out this form online, print completed form and submit with proposal to originating department. All questions must be answered.

For details on use of this form, see [Section 2-59 through 2-61](#) of the City's Ethics Code.

*This is a New Submission or Correction or Update to previous submission.

*1. Name of person submitting this disclosure form:

First: John M.I. A Last: Fregonese Suffix: _____

*2. Contract information.

a) Contract or project name: Corridor Land Use Planning Study RFQ #61000006917 (RFQ 16-021)

b) Originating department: _____

*3. Name of individual(s) or entity(ies) seeking a contract with the city (i.e. parties to the contract).

Fregonese Associates, Inc.

*4. List any individual(s) or entity(ies) that is a partner, parent, joint venture, or subsidiary entity(ies) of the individual or entity listed in Question 3.

Not applicable. Contracting party(ies) does not have partner, parent, joint venture, or subsidiary entities.

Names of partner, parent, joint venture or subsidiary entities, and all the board members, executive committee members, and officers of each entity:

*5. List any individuals or entities that will be subcontractors on this contract.

Not applicable. No subcontractors will be retained for this contract.

Subcontractors may be retained, but have not been selected at the time of this submission.

List of subcontractors, including the name of the owner(s), and business name:

Cambridge Systematics - Kelsey Ahern
DKS Associates - Randall McCourt
E.D. Hovee & Co. - Eric Hovee
Steve Nivin Consulting - Steve Nivin
RJ Rivera Associates - Rodolfo J. Rivera

*6. List any attorneys, lobbyists, or consultants retained by any individuals listed in Questions 3, 4, or 5 to assist in seeking this contract.

Not applicable. No attorneys, lobbyists, or consultants have been retained to assist in seeking this contract.

List of attorneys, lobbyists, or consultants retained to assist in seeking this contract:

CONTRACTS DISCLOSURE FORM

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City of San Antonio Contracts Disclosure Form

Office of the
City Clerk

<p>*7. Disclosure of political contributions.</p> <p>List any campaign or officeholder contributions made by the following individuals in the past 24 months totaling more than \$100 to any current member of City Council, former member of City Council, any candidate for City Council, or to any political action committee that contributes to City Council elections:</p> <ul style="list-style-type: none"> a) any individual seeking contract with the city (Question 3) b) any owner or officer of entity seeking contract with the city (Question 3) c) any individual or owner or officer of an entity listed above as a partner, parent, or subsidiary business (Question 4) d) any subcontractor or owner/officer of subcontracting entity retained for the contract (Question 5) e) the spouse of any individual listed in response to (a) through (d) above f) any attorney, lobbyist, or consultant retained to assist in seeking contract (Question 6) <p><input checked="" type="checkbox"/> Not applicable. No campaign or officeholder contributions have been made in preceding 24 months by these individuals.</p> <p><input type="checkbox"/> List of contributions:</p>	
<p>Updates on Contributions Required</p> <p>Information regarding contributions must be updated by submission of a revised form from the date of the submission of this form, up through the time City Council takes action on the contract identified in response to Question 2 and continuing for 30 calendar days after the contract has been awarded.</p>	
<p>Notice Regarding Contribution Prohibitions for "High-Profile" Contracts</p> <p>Under <u>Section 2-309 of the Municipal Campaign Finance Code</u>, the following listed individuals are prohibited from making a campaign or officeholder contribution to any member of City Council, candidate for City Council or political action committee that contributes to City Council elections from the 10th business day after a contract solicitation has been released until 30 calendar days after the contract has been awarded:</p> <ul style="list-style-type: none"> a) Legal signatory of a high-profile contract b) Any individual seeking a high-profile contract c) Any owner or officer of an entity seeking a high-profile contract d) The spouse of any of individual listed in response to (a) through (c) above e) Any attorney, lobbyist, or consultant retained to assist in seeking a high-profile contract <p>Penalty. A high-profile contract cannot be awarded to the individual or entity if a prohibited contribution has been made by any of these individuals during the contribution "black-out" period, which is the 10th business day after a solicitation has been released until 30 calendar days after the contract has been awarded.</p>	
<p>*8. Disclosure of conflict of interest.</p> <p>Are you aware of any fact(s) with regard to this contract that would raise a "conflict of interest" issue under <u>Sections 2-43 or 2-44</u> of the City Ethics Code for any City Council member or board/commission member that has not or will not be raised by these city officials?</p> <p><input checked="" type="checkbox"/> I am not aware of any conflict(s) of interest issues under Section 2-43 or 2-44 of the City Ethics Code for members of City Council or a city board/commission.</p> <p><input type="checkbox"/> I am aware of the following conflict(s) of interest:</p>	

CONTRACTS DISCLOSURE FORM

* = Required fields



City of San Antonio Contracts Disclosure Form

Office of the
City Clerk

***9. Prohibited Interest in Contracts.**

Currently, or within the past twelve (12) months, have you, your spouse, sibling, parent, child or other family member within the first degree of consanguinity or affinity served on a City board or commission?

Currently, or within the past twelve (12) months, has an owner, partner or employee of a business entity in which you, your spouse, parent, child own 10% or more of the voting stock or shares, or 10% or more of the fair market value served on a City board or commission?

Currently, or within the past twelve (12) months, has an owner, partner, or employee of a business entity who owns 10% or more of the voting stock or shares, or 10% or more of the fair market value, that will be a subcontractor for this contract, served on a City board or commission?

No
 Yes

Notice Regarding Prohibited Interest in Contracts.

Please be aware, the City's Charter and Ethics Code prohibits members of certain more-than-advisory boards and commissions, as well as their close family members and any businesses they or their families hold a 10% or greater ownership interest from obtaining a contract with the City during their board or commission service. The prohibition extends to subcontracts on City contracts, and would also apply to parent, subsidiary or partner businesses owned by the member of the board or commission and their family. Please see [Section 141 of the City Charter](#) and [Section 2-52](#) of the City Ethics Code (Prohibited Interests in Contracts) for complete information.

Former members of certain more-than-advisory boards and commissions, their family members and the businesses they own will continue to be prohibited from obtaining any discretionary contracts for one year after leaving City service. Please see [Section 2-58](#) of the City Ethics Code (Prohibited Interest in Discretionary Contracts) for complete information.

Please note that any contract in place at the time the applicant becomes a City officer may remain in effect, but cannot be amended, extended, modified, or changed in any manner during the officer's City service on the more-than-advisory board.

If you have any questions, please contact the Office of the City Attorney to request to speak with a member of the Ethics staff: (210) 207-8940.

Acknowledgements

***1. Updates Required**

I understand that this form must be updated by submission of a revised form if there is any change in the information before the discretionary contract, housing and retail development incentive, or the purchase, sale, or lease of real estate to or from the City is the subject of action by the City Council, and no later than 5 business days after any change has occurred, whichever comes first. This includes information about political contributions made after the initial submission and up until 30 calendar days after contract has been awarded.

***2. No Contact with City Officials or Staff during Contract Evaluation**

I understand that a person or entity who seeks or applies for a city contract or any other person acting on behalf of that person or entity is prohibited from contacting city officials and employees regarding the contract after a Request for Proposal (RFP), Request for Qualification (RFQ), or other solicitation has been released.

This no-contact provision shall conclude when the contract is posted as a City Council agenda item. If contact is required with city officials or employees, the contact will take place in accordance with procedures incorporated into the solicitation documents. Violation of this prohibited contacts provision set out in [Section 2-61](#) of the City Ethics Code by respondents or their agents may lead to disqualification of their offer from consideration.

CONTRACTS DISCLOSURE FORM

* = Required fields



City of San Antonio Contracts Disclosure Form

Office of the
City Clerk

***3. Contribution Prohibitions for "High-Profile" Contracts**

This is not a high-profile contract.
 This is a high-profile contract.

***4. Conflict of Interest Questionnaire (CIQ)**
Chapter 176 of the Local Government Code requires all contractors and vendors to submit a Conflict of Interest Questionnaire Form (CIQ) to the Office of the City Clerk, even if contract is not designated as "High Profile".

I acknowledge that I have been advised of the requirement to file a CIQ form under Chapter 176 of the Local Government Code.

***Oath**

I swear or affirm that the statements contained in this Contracts Disclosure Form, including any attachments, to the best of my knowledge and belief are true, correct, and complete.

Your Name: John Fregonese Title: President

Company Name or DBA: Fregonese Associates, Inc. Date: 02/04/2016

Please fill this form out online, print completed form and submit with proposal to originating department. All questions must be answered.
If necessary to mail, send to:
Purchasing
P.O. Box 839966
San Antonio, Texas 78283-3966

LITIGATION DISCLOSURE FORM

ATTACHMENT C

LITIGATION DISCLOSURE FORM

Respond to each of the questions below by checking the appropriate box. Failure to fully and truthfully disclose the information required by this Litigation Disclosure form may result in the disqualification of your proposal from consideration or termination of the contract, once awarded.

Have you or any member of your Firm or Team to be assigned to this engagement ever been indicted or convicted of a felony or misdemeanor greater than a Class C in the last five (5) years?

Yes No

Have you or any member of your Firm or Team to be assigned to this engagement been terminated (for cause or otherwise) from any work being performed for the City of San Antonio or any other Federal, State or Local Government, or Private Entity?

Yes No

Have you or any member of your Firm or Team to be assigned to this engagement been involved in any claim or litigation with the City of San Antonio or any other Federal, State or Local Government, or Private Entity during the last ten (10) years?

Yes No

If you have answered "Yes" to any of the above questions, please indicate the name(s) of the person(s), the nature, and the status and/or outcome of the information, indictment, conviction, termination, claim or litigation, as applicable. Any such information should be provided on a separate page, attached to this form and submitted with your proposal.

SBEDA PROGRAM FORM



CITY OF SAN ANTONIO SUBCONTRACTOR/SUPPLIER UTILIZATION PLAN

SOLICITATION NAME: **Corridor Land Use Planning Study**

RESPONDENT NAME: **Fregonese Associates, Inc.**

SOLICITATION API: **Small Business Enterprise (SBE) Prime Contract AND Minority/Woman Business Enterprise (MWBE) Prime Contract Programs**

API REQUIREMENTS: In order to receive the ten (10) evaluation preference points associated with the SBE Prime Contract Program and the ten (10) evaluation preference points associated with the MWBE Prime Contract Program, S/M/WBE Prime Respondents must document on this form that at least 51% of this contract shall be self-performed or shall be subcontracted to other certified Small Business Enterprises with a Significant Business Presence within the San Antonio Metropolitan Statistical Area.

For further clarification, please contact David Rodriguez at 210-207-0071.

Enter Respondent's (Prime) proposed contract participation level. Leave blank for revenue generating contracts.

	PARTICIPATION DOLLAR AMOUNT	% LEVEL OF PARTICIPATION	CERTIFICATION TYPE AND NUMBER	TYPE OF WORK TO BE PERFORMED (BY NIGP CODE)
Prime: Fregonese Associates SAePS Vendor #: 10015194	\$ 140,000	56 %	HABE MBE SBE SCTRCA #: 214124888	91892

List ALL subcontractors/suppliers that will be utilized for the entire contract period, excluding possible extensions, renewals and/or alternates. Use additional pages if necessary.

Sub: Cambridge Systematics SAePS Vendor #: 10017950	\$ 55,000	22 %	SCTRCA #:	55090, 91832, 91846
Sub: Dks Associates SAePS Vendor #: 10037367	\$ 10,000	4 %	SCTRCA #:	92593
Sub: E.D. Hovee & Co SAePS Vendor #: 10017860	\$ 10,000	4 %	SCTRCA #:	91889
Sub: R.J. Rivera SAePS Vendor #: 10024931	\$ 25,000	10 %	HABE MBE SBE SCTRCA #: 215090610	92533

** Prime respondent and all subcontractors/suppliers must be registered in the City of San Antonio Electronic Procurement System (SAePS). To learn more about how to register, please call (210) 207-0118 or visit <http://www.sanantonio.gov/purchasing/saeps.aspx>.

SBEDA PROGRAM FORMS

Sub: Steven R. Nivin	\$ 10,000	4	% ESBE, SBE	91837
SAePS Vendor #: 10029533			SCTRCA #: 215029779	
Sub:	\$		%	
SAePS Vendor #:			SCTRCA #:	
Sub:	\$		%	
SAePS Vendor #:			SCTRCA #:	
Sub:	\$		%	
SAePS Vendor #:			SCTRCA #:	
Sub:	\$		%	
SAePS Vendor #:			SCTRCA #:	
A.Total Prime Participation:	\$ 140,000	56	%	A. Total base bid amount to be kept by prime.
B.Total Sub Participation:	\$ 110,000	44	%	B. Total amount prime will pay to certified and non-certified subcontractors/suppliers
C.Total Certified Sub Participation:	\$ 35,000	14	%	C. Total amount prime will pay to certified subcontractors/suppliers per the eligibility requirements stated above
D.Total Prime & Sub Participation*:	\$ 250,000	100	%	D. Total prime and subcontractor(s)/supplier(s) participation must equal your base bid amount (A+B)

If a business is not certified, please call the Small Business Program Office at (210) 207-3900 for information and details on how subcontractors and suppliers may obtain certification.

I HEREBY AFFIRM THAT I POSSESS DOCUMENTATION FROM ALL PROPOSED SUBCONTRACTORS/SUPPLIERS CONFIRMING THEIR INTENT TO PERFORM THE SCOPE OF WORK FOR THE PRICE INDICATED ABOVE. I FURTHER AFFIRM THAT THE ABOVE INFORMATION IS TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I UNDERSTAND AND AGREE THAT, IF AWARDED THE CONTRACT, THIS DOCUMENT SHALL BE ATTACHED THERETO AND BECOME A BINDING PART OF THE CONTRACT.

Print Name: John Fregonese Sign: [Signature] Title: President
 Date: 2/5/16

 FOR CITY USE

Action Taken: Approved _____ Denied _____

ASSISTANT DIRECTOR
 ECONOMIC DEVELOPMENT DEPARTMENT

Version 09/04/13

SBEDA PROGRAM FORMS



South Central Texas Regional Certification Agency

Your unified certification source
www.sctrca.org

December 2, 2014

John Fregonese
Fregonese Associates, Inc
1525 Southwest Park Avenue, #200
Portland, OR 97201

Dear John Fregonese:

We are pleased to inform you that your application for certification in our Small, Minority, Woman, African American, Veteran, and Disabled Individual Business Enterprise (S/M/W/AA/V/DI) Program has been approved. Your firm met the requirements of SCTRCA Standards and is currently certified as a:

***HABE MBE SBE**

Certification Number: **214124888**
Certification Renewal: **December 31, 2016**
Certification Expiration: **December 31, 2016**

Providing the following products or services:
NAICS-541320: URBAN PLANNING SERVICES

On the two year anniversary date of your certification, you are required to provide a renewal application affirming that no changes have occurred affecting your certification status. The SCTRCA will send you a Certification Renewal reminder **sixty (60) days** prior to your expiration date. The SCTRCA will no longer include a certificate upon certification renewals. Your expiration date is December 31, 2016.

Please notify this office within **thirty (30) days** of any changes affecting the size, ownership, control requirements, or any material change in the information provided in the submission of the certification application. Thank you in advance.

Sincerely,

Blaine R. Mitchell
Executive Director

LPP ORDINANCE IDENTIFICATION FORM

City of San Antonio
Finance Department - Purchasing Division
Local Preference Program Identification Form

The City of San Antonio Local Preference Program, described in the San Antonio City Code Chapter 2, Article XII, establishes a local preference for specific contracting categories. Each time a bidder or respondent submits a bid for a solicitation, this Local Preference Program Identification Form must be completed and turned in with the solicitation response in order to be identified as a City Business and receive the preference described below. The City will not rely on Local Preference Program Identification Forms submitted with prior or contemporaneous bids or proposals.

The Local Preference Program allows the City to grant a preference to a business meeting the definition of *City Business* in the award of the following types of contracts, when selection is made based on price alone:

- **Personal Property (Goods / Supplies):** The local bidder's price must be within 3% of the price of the lowest non-local bidder for contracts of \$50,000 or more;
- **Non-professional Services:** The local bidder's price must be within 3% of the price of the lowest non-local bidder for contracts of \$50,000 to under \$500,000;
- **Construction Services:** The local bidder's price must be within 3% of the price of the lowest non-local bidder for contracts of \$50,000 to under \$100,000, excluding contracts awarded using alternative delivery methods.

The Local Preference Program also allows the award of additional points, when multiple evaluation criteria are used in the award of professional service contracts, where the selection process is not governed by statute and in revenue generating and concession contracts. A business meeting the definition of *City Business* stated below may be awarded 10 points for being headquartered within the city, or 5 points for having a local office within the city.

Moreover, the program recognizes joint venture agreements and allows for apportioning of points based upon the percentage of ownership of joint ventures by *City Businesses* responding to solicitations for which discretionary points are applied. For solicitations where selection is made based on price alone, all members of a joint venture must be *City Businesses* for the preference to be applied.

City Business is defined as a business headquartered within the incorporated San Antonio city limits for one year or more OR one that meets the following conditions:

- Has an established place of business for one year or more in the incorporated limits of the City:
 - (a) from which at least 100 of its employees OR at least 20% of its total full-time, part-time and contract employees are regularly based; and
 - (b) from which a substantial role in the business' performance of a commercially useful function or a substantial part of its operations is conducted by those employees.

A location utilized solely as a post office box, mail drop or telephone message center or any similar combination, with no other substantial work function, is not a *City Business*.

For the purposes of this program, Headquartered is defined as the place where a business entity's officers direct, control, and coordinate the entity's activities.

NOTE: Bidders / Respondents are required to submit documentation to substantiate that the requirements of a City Business have been met. Examples of documentation may include, but are not limited to the following:

1. Existence of local headquarters or office: For corporations, Texas Comptroller's listing of names/addresses of officers and directors. For partnerships, partnership agreement and any documents identifying the current managing partners and their current work addresses
2. Evidence of local headquarters or office in existence for one year or more: Utility bills, real property lease agreements, equipment leases, personal property taxes, real property taxes
3. Evidence of number of employees: Organizational charts, payroll records by location

LPP ORDINANCE IDENTIFICATION FORM

City of San Antonio
Finance Department - Purchasing Division
Local Preference Program Identification Form

CITY RESERVES THE RIGHT TO REQUEST ADDITIONAL INFORMATION TO VALIDATE BIDDERS'/RESPONDENTS' DESIGNATION AS A CITY BUSINESS.

COMPLETE THE FOLLOWING FORM AND SUBMIT WITH YOUR RESPONSE EVEN IF YOU ARE NOT SEEKING A LOCAL PREFERENCE. THE BIDDER / RESPONDENT MUST COMPLETE THE FOLLOWING FORM TO BE IDENTIFIED AS A CITY BUSINESS. IF BIDDER / RESPONDENT IS SUBMITTING AS A JOINT VENTURE, EACH CITY BUSINESS THAT IS A MEMBER OF THE JOINT VENTURE MUST COMPLETE AND SIGN THIS FORM.

PROVIDE THE FOLLOWING INFORMATION IF BIDDER/ RESPONDENT IS SUBMITTING AS PART OF A JOINT VENTURE. Joint Venture means a collaboration of for-profit business entities, in response to a solicitation, which is manifested by a written agreement, between two or more independently owned and controlled business firms to form a third business entity solely for purposes of undertaking distinct roles and responsibilities in the completion of a given contract. Under this business arrangement, each joint venture partner shares in the management of the joint venture and also shares in the profits or losses of the joint venture enterprise commensurately with its contribution to the venture.

STATE BIDDER'S / RESPONDENT'S PERCENTAGE OF OWNERSHIP IN THE JOINT VENTURE: _____%

SUBMIT A COPY OF THE JOINT VENTURE AGREEMENT. SUBMIT ANY OTHER DOCUMENTATION REQUESTED BY CITY TO SUBSTANTIATE THE EXISTANCE OF AND/OR PARTICIPATION IN THE JOINT VENTURE. NO PREFERENCE POINTS WILL BE ALLOCATED TO A JOINT VENTURE THAT FAILS TO SUBMIT REQUIRED DOCUMENTATION.

SOLICITATION NAME/NUMBER: Corridor Land Use Planning Study RFQ 16-021

PROVIDE THE FOLLOWING INFORMATION REGARDING BIDDER'S / RESPONDENT'S HEADQUARTERS:

Name of Business:	<u>Fregonese Associates, Inc.</u>	
Physical Address:	<u>1525 SW Park Ave, Ste 200</u>	
City, State, Zip Code:	<u>Portland, OR 97201</u>	
Phone Number:	<u>503-228-3054</u>	
Email Address:	<u>john@frego.com</u>	
Provide the total number of full-time, part-time, and contract personnel employed by Bidder / Respondent:	<u>12</u>	
Is Business headquartered within the incorporated San Antonio city limits? (circle one)	Yes	<input checked="" type="radio"/> No
Has the business been headquartered in the incorporated San Antonio city limits for one year or more? (circle one)	Yes	<input checked="" type="radio"/> No
If the answers to the questions above are "Yes", stop here. If the answer to either of the above questions is "No", provide responses to the following questions:		

LPP ORDINANCE IDENTIFICATION FORM

City of San Antonio
Finance Department - Purchasing Division
Local Preference Program Identification Form

PROVIDE THE FOLLOWING INFORMATION REGARDING BIDDER'S / RESPONDENT'S LOCAL OFFICE (IF APPLICABLE):

Name of Business:	N/A	
Physical Address:		
City, State Zip Code:		
Phone Number:		
Email Address:		
Provide the total number of full-time, part-time, and contract personnel employed by Bidder / Respondent in the local office: _____		
Is the business located in the incorporated San Antonio city limits? (circle one)	Yes	No
Has the business been located in the incorporated San Antonio city limits for one year or more? (circle one)	Yes	No
Are at least 100 full-time, part-time or contract employees regularly based in the San Antonio office? (circle one)	Yes	No
Are at least 20% of the business' total full-time, part-time or contract employees regularly based in the San Antonio office? (circle one)	Yes	No
Do the employees in the San Antonio office perform a substantial role in the business' performance of a commercially useful function or are a substantial part of the business' operations conducted in the San Antonio office? (circle one)	Yes	No

LPP ORDINANCE IDENTIFICATION FORM

City of San Antonio
Finance Department - Purchasing Division
Local Preference Program Identification Form

ACKNOWLEDGEMENT

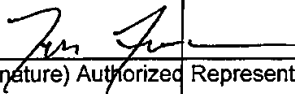
THE STATE OF TEXAS

I certify that my responses and the information provided on this Local Preference Program Identification Form are true and correct to the best of my personal knowledge and belief and that I have made no willful misrepresentations on this form, nor have I withheld any relevant information in my statements and answers to questions. I am aware that any information given by me on this Local Preference Program Identification Form may be investigated and I hereby give my full permission for any such investigation, including the inspection of business records and site visits by City or its authorized representative. I fully acknowledge that any misrepresentations or omissions in my responses and information may cause my offer to be rejected or contract to be terminated. I further acknowledge that providing false information is grounds for debarment.

BIDDER'S / RESPONDENT'S FULL NAME:

JOHN FREGONESE

(Print Name) Authorized Representative of Bidder / Respondent



(Signature) Authorized Representative of Bidder / Respondent

PRESIDENT

Title

1/29/2014

Date

This Local Preference Identification Form must be submitted with the bidder's / respondent's bid/proposal response.

VOSB IDENTIFICATION FORM

City of San Antonio

Veteran-Owned Small Business (VOSB) Preference Program Identification Form

Authority. San Antonio City Code Chapter 2, Article XI describes the City's veteran-owned small business preference program.

Certification. The City relies on inclusion in the database of veteran-owned small businesses maintained by the U.S. Small Business Administration to verify VOSB status; however, veteran status may also be confirmed by certification by another public or private entity that uses similar certification procedures.

Preference. The VOSB preference applies to procurements of discretionary expenditure and revenue contracts for goods, services, and concessions, where the selection criteria are not limited by state or federal law. The preference consists of 5% of the evaluation points for a business that is certified as a Veteran-Owned Small Business. Moreover, the program recognizes joint venture agreements and allows for apportioning of points based upon the percentage of VOSB ownership of a joint venture responding to solicitations for which discretionary points are applied. There are no points available for VOSB subcontractors.

Tracking. In order to determine whether the program can be expanded at a later date, the City tracks VOSB participation at both the primary contract and subcontract levels.

Exclusions. This program does not apply to any expenditure or revenue contract with a value that is less than the amount that is required to be bid pursuant to state law (Chapter 252, Texas Local Government Code, as amended), currently \$50,000 or less, or where limited by state or federal law.

Definitions.

The program uses the federal definitions of veteran and veteran-owned small business found in 38 CFR Part 74.

- The term "veteran" means a person who served on active duty with the U.S. Army, Air Force, Navy, Marine Corps, Coast Guard, for any length of time and at any place and who was discharged or released under conditions other than dishonorable. Reservists or members of the National Guard called to federal active duty or disabled from a disease or injury incurred or aggravated in line of duty or while in training status.
- A veteran-owned small business is a business that is not less than 51 percent owned by one or more veterans, or in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; the management and daily business operations of which are controlled by one or more veterans and qualifies as "small" for Federal business size stand purposes.

The program uses the below definition of joint venture.

- Joint Venture means a collaboration of for-profit business entities, in response to a solicitation, which is manifested by a written agreement, between two or more independently owned and controlled business firms to form a third business entity solely for purposes of undertaking distinct roles and responsibilities in the completion of a given contract. Under this business arrangement, each joint venture partner shares in the management of the joint venture and also shares in the profits or losses of the joint venture enterprise commensurately with its contribution to the venture.

The program does not distinguish between a veteran and a service-disabled veteran-owned business and is not limited geographically.

COMPLETE THE FOLLOWING FORM AND SUBMIT WITH YOUR RESPONSE EVEN IF YOU ARE NOT SEEKING A VETERAN'S PREFERENCE. THE RESPONDENT MUST COMPLETE AND SUBMIT THE FOLLOWING FORM TO BE IDENTIFIED AS A VETERAN-OWNED SMALL BUSINESS. IF RESPONDENT IS SUBMITTING AS A JOINT VENTURE, EACH VOSB MEMBER OF A JOINT VENTURE MUST COMPLETE AND SIGN THIS FORM.

VOSB IDENTIFICATION FORM

City of San Antonio

Veteran-Owned Small Business (VOSB) Preference Program Identification Form

PROVIDE THE FOLLOWING INFORMATION IF RESPONDENT IS SUBMITTING AS PART OF A JOINT VENTURE.

SUBMIT A COPY OF THE JOINT VENTURE AGREEMENT AND ANY OTHER DOCUMENTATION TO SUBSTANTIATE THE EXISTANCE OF AND/OR PARTICIPATION IN THE JOINT VENTURE. NO PREFERENCE POINTS WILL BE ALLOCATED TO A JOINT VENTURE THAT FAILS TO SUBMIT REQUIRED DOCUMENTATION.

INSTRUCTIONS

- IF SUBMITTING AS A PRIME CONTRACTOR ONLY, COMPLETE **SECTION 1** OF THIS FORM.
- IF SUBMITTING AS A PRIME CONTRACTOR UTILIZING A SUBCONTRACTOR, COMPLETE **SECTIONS 1 AND 2** OF THIS FORM.
- IF SUBMITTING AS PART OF A JOINT VENTURE, COMPLETE **SECTION 3** OF THIS FORM.
- IF SUBMITTING AS A JOINT VENTURE UTILIZING A SUBCONTRACTOR, COMPLETE **SECTIONS 2 AND 3** OF THIS FORM.

VOSB IDENTIFICATION FORM

City of San Antonio

Veteran-Owned Small Business (VOSB) Preference Program Identification Form

SOLICITATION NAME/NUMBER: Corridor Land Use Planning Study RFQ 16-021

Section 1: Prime Contractor

Name of PRIME CONTRACTOR:	Fregonese Associates, Inc.	
Physical Address:	1525 SW Park Ave Ste 200	
City, State, Zip Code:	Portland, OR 97201	
Phone Number:	503-228-3054	
Email Address:	john@frego.com	
Is PRIME CONTRACTOR certified as a VOSB with the U.S. Small Business Administration? (circle one)	Yes	<input checked="" type="radio"/> No
If yes, provide the SBA Certification #		
If not certified by the SBA, is PRIME CONTRACTOR certified as a VOSB by another public or private entity that uses similar certification procedures? (circle one)	Yes	<input checked="" type="radio"/> No
If yes, provide the name of the entity who has certified PRIME CONTRACTOR as a VOSB. Include any identifying certification numbers.		
Participation Percentage:	N/A	
Participation Dollar Amount:	N/A	

Section 2: Subcontractor

Is PRIME CONTRACTOR subcontracting with a business that is certified as a VOSB? (circle one)	Yes	<input checked="" type="radio"/> No
Name of SUBCONTRACTOR Veteran-Owned Small Business:		
Physical Address:		
City, State, Zip Code:		
Phone Number:		
Email Address:		
Is SUBCONTRACTOR certified as a VOSB with the U.S. Small Business Administration? (circle one)	Yes	<input checked="" type="radio"/> No
If yes, provide the SBA Certification #		
If not certified by the SBA, is SUBCONTRACTOR certified as a VOSB by another public or private entity that uses similar certification procedures? (circle one)	Yes	<input checked="" type="radio"/> No
If yes, provide the name of the entity who has certified SUBCONTRACTOR as a VOSB. Include any identifying certification numbers.		
Participation Percentage:	N/A	
Participation Dollar Amount:	N/A	

VOSB IDENTIFICATION FORM

City of San Antonio
Veteran-Owned Small Business (VOSB) Preference Program Identification Form

Section 3: Joint Ventures

Is Respondent submitting as part of a joint venture? (circle one)	Yes	No
Name of Joint Venture VOSB Member:		
Physical Address:		
City, State, Zip Code:		
Phone Number:		
Email Address:		
Percentage of Ownership of Joint Venture by VOSB Member:		
Is Joint Venture VOSB Member certified as a VOSB with the U.S. Small Business Administration? (circle one)	Yes	No
If yes, provide the SBA Certification #		
If not certified by the SBA, is Joint Venture VOSB Member certified as a VOSB by another public or private entity that uses similar certification procedures? (circle one)	Yes	No
If yes, provide the name of the entity who has certified Joint Venture VOSB Member as a VOSB. Include any identifying certification numbers.		
VOSB Member's Percentage Share in Profits / Loss of Joint Venture		

VOSB IDENTIFICATION FORM

City of San Antonio
Veteran-Owned Small Business (VOSB) Preference Program Identification Form

ACKNOWLEDGEMENT

THE STATE OF TEXAS

I certify that my responses and the information provided on this Veteran-Owned Small Business Preference Program Identification Form are true and correct to the best of my personal knowledge and belief and that I have made no willful misrepresentations on this form, nor have I withheld any relevant information in my statements and answers to questions. I am aware that any information given by me on this Veteran-Owned Small Business Preference Program Identification Form may be investigated and I hereby give my full permission for any such investigation, including the inspection of business records and site visits by City or its authorized representative. I fully acknowledge that any misrepresentations or omissions in my responses and information may cause my offer to be rejected or contract to be terminated. I further acknowledge that providing false information is grounds for debarment.

RESPONDENT'S FULL NAME:

John Fregonese
(Print Name) Authorized Representative of Respondent

[Signature]
(Signature) Authorized Representative of Respondent

President
Title

1/29/2016
Date

This Veteran-Owned Small Business Preference Program Identification Form must be submitted with the Respondent's proposal.

PROOF OF INSURABILITY



January 21, 2016

City of San Antonio
Attn: Development of Planning and Community Development Dept.
PO Box 839966
San Antonio, TX 78283-3966

RE: Proof of Insurability for Fregonese Associates, Inc.

To Whom it may Concern:

I'm the Insurance Agent for Fregonese Associates, Inc. and their insurance provider for General Liability and Business Automobile Liability which is written with Sentinel Insurance Company, a division of The Hartford, with an A (Excellent) financial rating.

The Professional Liability is written with Westchester Fire Insurance/ACE Group with an A++, XV (Excellent) rating by A.M. Best.

The Workers Compensation is written with SAIF Corporation, the largest work comp provider in the State of Oregon. Since this is a government owned non-profit organization they are not rated by A.M. Best.

Should you have any questions, please feel free to give me a call at (503) 445-8428.

Sincerely,

A handwritten signature in black ink that reads 'Alissa Mishler'. The signature is fluid and cursive, written over a light blue horizontal line.

Alissa Mishler
Insurance Agent
amishler@epbb.com

Elliott, Powell, Baden & Baker, Inc.

1521 SW Salmon Street • Portland, Oregon 97205-1783
Phone: 503.227.1771 • Fax: 503.274.7644 • email: insure@epbb.com • www.epbb.com



PROOF OF INSURABILITY



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
1/19/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Elliott Powell Baden and Baker Inc. 1521 S.W. Salmon Street Portland OR 97205-1783		CONTACT NAME: Cindy Cromwell PHONE (A/C, No, Ext): (503) 227-1771 FAX (A/C, No): (503) 274-7644 E-MAIL ADDRESS: ccromwell@epbb.com	
INSURED FREGONESE & ASSOCIATES, INC 1525 SW PARK AVE. PORTLAND OR 97201		INSURER(S) AFFORDING COVERAGE INSURER A: Sentinel Insurance Co, LTD NAIC # 11000 INSURER B: SAIF Corporation 52412 INSURER C: Westchester Fire Insurance INSURER D: INSURER E: INSURER F:	

COVERAGES CERTIFICATE NUMBER: 15-16 G1 AU WC & E&O REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS								
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	52SBAPW4493	3/1/2015	3/1/2016	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 UAUTO \$								
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS		52UECJH5924	3/1/2015	3/1/2016	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ PIP-Basic \$								
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		52SBAPW4493	3/1/2015	3/1/2016	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 \$								
B	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	900667	3/1/2015	3/1/2016	<table border="1"> <tr> <td>PER STATUTE</td> <td>OTH-ER</td> </tr> <tr> <td>E.L. EACH ACCIDENT</td> <td>\$ 1,000,000</td> </tr> <tr> <td>E.L. DISEASE - EA EMPLOYEE</td> <td>\$ 1,000,000</td> </tr> <tr> <td>E.L. DISEASE - POLICY LIMIT</td> <td>\$ 1,000,000</td> </tr> </table>	PER STATUTE	OTH-ER	E.L. EACH ACCIDENT	\$ 1,000,000	E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000	E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
PER STATUTE	OTH-ER													
E.L. EACH ACCIDENT	\$ 1,000,000													
E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000													
E.L. DISEASE - POLICY LIMIT	\$ 1,000,000													
C	Professional Liability		G27571256001	3/27/2015	3/27/2016	2,000,000								

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
RE: Corridor Land Use Planning Study RFQ 61000006917 (RFQ 16-021).
 See SS0008 04/05.

CERTIFICATE HOLDER City of San Antonio P.O. Box 839976 San Antonio, TX 78283	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Cindy Cromwell/CB <i>Cindy Cromwell</i>
--	---

ACORD 25 (2014/01) INS025 (2014011) The ACORD name and logo are registered marks of ACORD © 1988-2014 ACORD CORPORATION. All rights reserved.

SIGNATURE PAGE

RFQ ATTACHMENT G

SIGNATURE PAGE

Respondent, and co-respondent, if any, must complete City's Certified Vendor Registration (CVR) Form prior to the due date for submission of proposals. The CVR Form may be accessed at: <http://www.sanantonio.gov/purchasing/>.

By submitting a proposal, whether electronically or by paper, Respondent represents that:

If Respondent is a corporation, Respondent will be required to provide a certified copy of the resolution evidencing authority to enter into the contract, if other than an officer will be signing the contract.

If awarded a contract in response to this RFQ, Respondent will be able and willing to comply with the insurance and indemnification requirements set out in RFQ Exhibits 1 & 2.

If awarded a contract in response to this RFQ, Respondent will be able and willing to comply with all representations made by Respondent in Respondent's proposal and during Proposal process.

Respondent has fully and truthfully submitted a Litigation Disclosure form with the understanding that failure to disclose the required information may result in disqualification of proposal from consideration.

Respondent agrees to fully and truthfully submit the Respondent Questionnaire form and understands that failure to fully disclose requested information may result in disqualification of proposal from consideration or termination of contract, once awarded.

To comply with the City's Ethics Code, particularly Section 2-61 that prohibits a person or entity seeking a City contract - or any other person acting on behalf of such a person or entity - from contacting City officials or their staff prior to the time such contract is posted as a City Council agenda item.

(S)he is authorized to submit this proposal on behalf of the entity.

If submitting your proposal by paper, complete the following and sign on the signature line below. Failure to sign and submit this Signature Page will result in rejection of your proposal.

Fregonese Associates, Inc.
Respondent Entity Name

Signature: 

Printed Name: John Fregonese

Title: President

(NOTE: If proposal is submitted by Co-Respondents, an authorized signature from a representative of each Co-Respondent is required. Add additional signature blocks as required.)

If submitting your proposal electronically, through City's portal, Co-Respondent must also log in using Co-Respondent's log-on ID and password, and submit a letter indicating that Co-Respondent is a party to Respondent's proposal and agrees to these representations and those made in Respondent's proposal. While Co-Respondent does not have to submit a copy of Respondent's proposal, Co-Respondent should answer any questions or provide any information directed specifically to Co-Respondent.

Co-Respondent Entity Name

Signature: _____

Printed Name: _____

Title: _____

PROPOSAL CHECKLIST

ATTACHMENT H PROPOSAL CHECKLIST

Use this checklist to ensure that all required documents have been included in the proposal and appear in the correct order.

Document	Initial to confirm document is included in proposal
Table of Contents	JF
Executive Summary	JF
General Information and References RFQ Attachment A, Part One	JF
Experience, Background & Qualifications RFQ Attachment A, Part Two	JF
Proposed Plan RFQ Attachment A, Part Three	JF
*Contracts Disclosure Form RFQ Attachment B	JF
Litigation Disclosure Form RFQ Attachment C	JF
*SBEDA Forms and any applicable certificates RFQ Attachment D	JF
* Local Preference Program Form RFQ Attachment E	JF
*Veteran-owned Small Business Preference Program Form RFQ Attachment F	JF
Proof of Insurability (See RFQ Exhibit 2) Copy of Current Certificate of Insurance	JF
*Signature Page RFQ Attachment G	JF
Proposal Checklist RFQ Attachment H	JF
One (1) Original, Five (5) copies and one (1) CD of entire proposal in PDF format if submitting in hard copy.	

*Documents marked with an asterisk on this checklist require a signature. Be sure they are signed prior to submittal of proposal.