

# Boone County Purchasing

**Melinda Bobbitt, CPPO, CPPB**  
Director of Purchasing



613 E. Ash St., Room 110  
Columbia, MO 65201  
Phone: (573) 886-4391  
Fax: (573) 886-4390

---

## MEMORANDUM

TO: Boone County Commission  
FROM: Melinda Bobbitt, CPPO, CPPB  
DATE: December 12, 2023  
RE: Request for Proposal Award Recommendation: *C000705 (Bid 23-25JUL23 – Housing Study for Boone County, Missouri with Amarach Planning Services, LLC*

Request for Proposal 23-25JUL23 – *Housing Study for Boone County, Missouri* closed on July 27, 2023. Five proposal responses were received.

The evaluation committee consisted of:

Stephanie Browning, Director, Columbia/Boone County Public Health/Human Service Department  
Jennifer Deaver, Housing Programs Manager, Community Development, City of Columbia  
Bill Florea, Director, Boone County Resource Management  
Darin Preis, Executive Director, Central Missouri Community Action  
Brian Toohey, CEO, Columbia Board of REALTORS

Recommendation for award is to Amarch Planning Services, LLC of Ocala, Florida per the attached Evaluation Report.

Award is for a not to exceed contract amount of \$86,373.75 and will be paid from department 2132- Community Health Fund Program Funding, account 71101 – Professional Services. \$155,000 is budgeted for 2024.

ATT: Evaluation Committee Report

cc: RFP File

## Evaluation Form

*RFP # 23-25JUL23 Housing Study Review Committee*

Offeror #1: Amarach Planning Services, LLC

Scoring:

Method of Performance (30 points)	28
Experience/Expertise (20 points)	11
Cost (50 points)	50
<b>Total Score:</b>	<b>89</b>

Method of Performance (30 points)

**Strengths:**

- The scope of the study lists multiple items included in the RFP such as demographic and employment data, housing supply and demand, and community input.
- The original proposal did not clearly outline items requested in the scope of work but the response to Written Clarifications #1 explained the items would be included.
- The proposal includes a policy analysis of existing land use and zoning policies.
- The timeframe to conduct the study is 10 months.
- The approach to conducting the study seems logical.
- Included in-person meetings, guided tours, and presentations.
- Affordability and identification of affordability gaps is prominently discussed.
- Includes presentations to County Planning and Zoning Commission and County Commission. These presentations were adjusted to be held virtually in order to host more community meetings.
- The proposal presents a good understanding of Boone County's needs.
- The company appears to have a good sense of national sources utilized for data gathering.
- The proposal includes monthly progress reports.
- The proposal describes analyzing and providing recommendations on development or redevelopment projects.
- Interviews will be held with approximately 40 key stakeholders.
- Visits from the consultant include tours of the County and conducting community meetings.
- Community meetings will be led by the consultant rather than fully relying on County staff. The proposal notes community meetings will be held across the County. The consultant explained during the interview that he could organize community meetings instead of relying on County staff. Some guidance may be needed from staff but majority of the planning would be completed by the consultant.
- The original proposal only listed three community meetings which will be hard to cover the county in only three community meetings. The consultant increased the number of community meetings to five in their response to Written Clarifications #1.
- The proposal is unclear on the approach and reliable sources recommendations will be based on. The response to Written Clarifications #1 provided more information on how recommendations would be developed.

- The proposal has a heavy reliance on virtual meetings throughout the study. The response to Written Clarifications #1 explained that the budget is structured as a not-to-exceed amount. Meetings may be eliminated throughout the project.
- Amarach provided detailed information on how community meetings would be structured. The structure is designed with the intention of gathering thoughtful feedback from community members and described how it would be incorporated throughout the study and report.
- Includes community meetings early in the process, prior to the Market Analysis.
- Includes a “Growth Pattern Analysis” as part of the Housing Market Analysis.

**Concerns:**

- No redundancy of tasks for quality control.
- The steering committee only consisted of the Fair and Inclusive Housing workgroup and would need to include people who build housing and work with current regulations.

Experience/Expertise (20 points)

**Strengths:**

- The consultant is professionally certified with the American Institute of Certified Planners and has his Ph.D. in urban and regional planning.
- The company cites three similar studies.
- Dr. Boston’s resume lists multiple related projects and skills.
- Dr. Boston stated he would not take on additional contracts if contracted.

**Concerns:**

- Only one person will be working on the housing study from this company.
- The company is relatively new and lacks extensive experience.
- The previous projects listed seem small.
- The distance from the firm’s location and Boone County seems a disadvantage, practically in terms of an understanding of the social realities of the Midwest.
- A limited approach compared to input from a multi-disciplinary team.

Cost (50 points) – \$86,373.75 (BAFO)

**Strengths:**

- The proposal clearly outlines the cost and number of hours anticipated for each component of the study.
- The proposed amount is a low price.
- The number of hours aligns well with each task.
- The cost per hour seems reasonable.

**Concerns:**

## Offeror #2: Goldstone Consulting Group

### Scoring:

Method of Performance (30 points)	10
Experience/Expertise (20 points)	11
Cost (50 points)	37
<b>Total Score:</b>	<b>58</b>

### Method of Performance (30 points)

#### **Strengths:**

- Includes market assessments and housing development models for Boone County and each of the various communities.
- The consultant will tour Boone County communities. The consulting company is located in Moberly, Missouri which will reduce cost and increase their ability to spend more time in rural communities in Boone County.
- The proposal mentions providing a projection of additional housing units needed and specifically mentions the rural communities.
- The proposed timeline is for the study to be completed by June 2024.

#### **Concerns:**

- The proposal mentions various components of the scope of work but lacks specificity in how it will be conducted.
- The proposal lacks specificity regarding the timeline and conducting each component.
- The proposal did not include information on analyzing the student population and housing with supportive services.
- The approach seems basic.
- The proposal did not provide the anticipated number of hours needed to complete the study.
- The company will conduct an online survey but does not state what information will be sought or obtained by it.
- The proposal does not seem to factor in possible land use or zoning.
- Phase 1 seemed to be an inadequate start to the study.
- The proposal seems to rely heavily on Boone County staff.
- More information is needed on data sources and how information will be gathered.
- Information was not included on analyzing energy efficiency of housing units.
- The proposal mentions holding one open house and presenting information at a second open house. Communities in Boone County vary and additional meetings will be needed.

### Experience/Expertise (20 points)

#### **Strengths:**

- Consultants have a variety of experience that could be beneficial to conducting the housing study.
- The consultant company is located in mid-Missouri.
- The company has experience with smaller communities.
- The company has conducted similar housing studies in Missouri, including an affordable housing element.
- The number of personnel to work on the study seems reasonable.

#### **Concerns:**

- The proposal lists projects and references but does not provide detailed information about the projects.
- The company has experience with smaller communities and may have less complex growth dynamics.
- Focus of team members seems to be on economic development.
- Experience does not seem precisely relevant to housing assessment work.
- The proposal lacked an explanation of the work each personnel has completed previously.
- Unclear how serving on the Columbia Board of Realtors is a strength.
- The firm does not have as much experience compared to other firms that submitted proposals.

### Cost (50 points) - \$125,000.00

#### **Strengths:**

- The proposed cost is \$125,000.00.

#### **Concerns:**

- The proposal does not provide detailed information on how the proposed budget was developed and costs to conduct each component.
- The proposal does not mention the number of hours needed to complete the study.
- The cost seems high for being located close to Boone County and relying heavily on Boone County staff.

## Offeror #3: PGAV Planners LLC

## Scoring:

Method of Performance (30 points)	21
Experience/Expertise (20 points)	20
Cost (50 points)	25
<b>Total Score:</b>	<b>66</b>

## Method of Performance (30 points)

**Strengths:**

- The proposal describes the importance of diversity, equity, and inclusion practices when conducting community projects.
- The proposal describes the demographic and economic analysis which includes populations needing supportive services and students.
- The majority of the items listed in the scope of work were clearly described in the proposal.
- The agency collects community feedback through creative methods. The proposal notes difficulty in engaging with the community and looks for different methods to collect information and generate buy-in.
- The proposal presents a solid approach to conducting the study and provides a good strategy development section.
- The company will develop three demographic profiles: Residents, Students, and Labor Force.
- Proposal is developed as a logical progression of deliverables, demographic profiles, gap and barrier analysis, stakeholder engagement, and strategy development.
- The proposal notes aligning strategies across political subdivisions.
- The proposal notes importance of understanding the labor force and how it impacts housing needs.
- The proposal had strong data-informed suggestions.
- The initial meeting is in-person compared to being virtual.
- The proposal clearly states a policy analysis will look at existing policies contributing to the housing gap and projections if left unaddressed.
- The proposal mentions utilizing best practices for recommendations.
- Recommendations will include goals that are data driven and provide next steps for achieving goals.
- Data points will be provided to benchmark and track progress on goals.
- The proposal includes a dashboard outlining strategies, indicators of success, costs, and responsible entities.
- The study can be completed within eight months based on the response to Written Clarifications #1.
- The response to Written Clarifications #1 lists multiple strategies for collecting energy efficiency data.
- The response to Written Clarifications #1 provided more information on reliable data sources that will be used to conduct the study.

**Concerns:**

- PGAV added community meetings when requested but increased the cost significantly. The meetings seem loosely structured and lack guided facilitation from PGAV staff.
- Initiates stakeholder engagement very late in the process.

Experience/Expertise (20 points)

**Strengths:**

- PGAV has multiple team members that have a variety of skills that will help produce a well-rounded housing study.
- The proposal included extensive information on related projects the firm has produced. (2)
- The employees have relevant experience and qualifications. The employee resumes list projects they have worked on with the consulting company, including affordable housing issues.
- The company is based in Missouri.
- The company has experience with land use and zoning studies. The Kirkwood study seems similar.
- The company has multiple projects with the same communities which may demonstrate satisfaction from prior work.
- Developed an "implementation matrix" for Kirkwood to ensure the plan's vision was integrated into the decision-making processes.
- The company conducted a six-county housing study which seems like a complex project that requires integrating the needs of all the constituent counties. (2)
- The company has relevant experience across the state and has also completed studies across the country.

**Concerns:**

- The proposal lists numerous employees that may help with the project which may contribute to a higher cost to conduct the study.

Cost (50 points) - \$172,460.00 (BAFO)

**Strengths:**

- The proposal provides the anticipated number of hours and cost associated with each task outlined in the proposal.

**Concerns:**

- The cost increased significantly for providing four community meetings. The firm is located relatively close to Boone County to where travel expenses should be low.

## Offeror #4: TPMA

## Scoring:

Method of Performance (30 points)	24
Experience/Expertise (20 points)	17
Cost (50 points)	28
<b>Total Score:</b>	<b>68</b>

## Method of Performance (30 points)

**Strengths:**

- The consultant researched existing plans and reports on the community and mentions these tools throughout the proposal.
- The proposal outlined how each of the deliverables will be met throughout the study. All the deliverables were listed in the proposal.
- The proposal describes an intentional effort to reach underrepresented community members.
- The timeline to complete the study is 9 months.
- Robust analysis of economic conditions.
- Includes analysis of the impact of student housing needs on rental housing stock and neighborhoods.
- Includes a strong community engagement element.
- Proposal provides a more detailed response and scope.
- Commitment to presenting data in easy to understand format
- The proposal had a strong emphasis on stakeholder meetings.
- The proposal describes an Affordable Housing Strategy and Implementation Roadmap.
- The proposal had strong data-informed suggestions.
- The proposal had a strong gap and barriers analysis.
- The proposal notes the need to address housing disparities in communities.

**Concerns:**

- The proposal did not include open houses.
- The housing gap analysis may be too narrow at 0-150% of median income.
- Housing data source could be better.
- The proposal does not seem to address attainable housing and only focuses on affordable housing.
- The proposal copied the deliverables from the RFP and sometimes lacks specific information on how the information will be gathered.
- The proposal does not provide clear information on the anticipated number of hours to complete each task.



### Experience/Expertise (20 points)

#### **Strengths:**

- The proposed personnel to work on the project have adequate qualifications and experiences.
- The company has completed studies for large communities.
- The company has completed two county housing studies.
- The Project Lead specializes in housing research and strategy.
- The project team includes five personnel which is good for redundancy and quality control.
- Resumes include experience with related projects and their skills.
- The proposal provided information on previous projects and included a general description.

#### **Concerns:**

- Their expertise seems heavily focused on economic development; however, Attachment B includes more housing relate projects.
- The company lacks experience in our part of the country/state.
- The plans cited seem lacking, including one completed by students.
- The number of personnel seems high.

### Cost (50 points) - \$174,837.00

#### **Strengths:**

- The proposal provides the hourly rates and total number of hours for each team member.
- The time for each task seems reasonable and appropriate.
- The proposal provides the total cost per task.

#### **Concerns:**

- The average hourly rate is \$252.39/hr. The total cost is \$174,837.00
- The hourly rates for each team member seem extremely high.
- The proposal lacks detailed information on how the hours were estimated and overall project costs.

## Offeror #5: Urban Partners

### Scoring:

Method of Performance (30 points)	24
Experience/Expertise (20 points)	17
Cost (50 points)	31
<b>Total Score (100 points):</b>	<b>72</b>

### Method of Performance (30 points)

#### **Strengths:**

- The proposal will present the final report in a way that can be easily understood by a diverse audience.
- Majority of the deliverables were mentioned in the proposal and were detailed. Items that were not clearly stated were included in the response to Written Clarifications #1.
- The proposal mentioned utilization of ESRI psychographic tapestry data.
- The Housing Needs Assessment (Task 4) includes identifying spatial mismatch of jobs and labor force and interviews with major employers about their observations regarding the housing market.
- The timeline to complete the study is 9 months.
- Timeline is clear.
- The company will provide an interim report before a final report.
- The proposal acknowledges the impact of student housing.
- The proposal includes additional tools for the final analysis, public facing reports, and presentations.
- The proposal notes allowing clients to easily replicate their analytical methodology to allow for future updates.
- The proposal provides a detailed timeline for each task including number of hours and the assigned team member.
- Urban Partners added community meetings to increase community input when requested. The study also includes surveys for community members. Other input is provided by key interviews and information from the review committee.

#### **Concerns:**

- Information was not included on analyzing energy efficiency of housing units. The consultant explained in Written Clarifications #1 they are prepared to expand the scope of work and cost if a more robust analysis is needed.
- Initiates stakeholder engagement relatively late in the process.

### Experience/Expertise (20 points)

#### **Strengths:**

- The proposal describes the company's experience conducting studies for college communities.
- The proposed personnel to work on the project have adequate qualifications and experiences.
- The number of personnel to work on the study seems reasonable.
- The company has conducted several regional and county-level housing studies which will help them address the complexities of a plan spanning rural and urban areas.
- The personnel have varied backgrounds and experiences.
- The company has experience with Missouri communities.
- Resumes include experience with related projects and their skills.
- The proposal provided information on previous projects and included a general description.
- The project profiles provide a clear overview of various projects and key services performed.

#### **Concerns:**

- The company is based in Philadelphia.
- Limited experience with county-level projects.


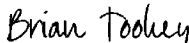

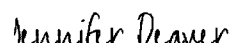
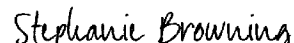
### Cost (50 points) - \$142,000.00 (BAFO)

#### **Strengths:**

- The team member with the lowest hourly rate has a significantly higher number of hours working on the project compared to team members with higher hourly rates.
- The additional cost of adding community meetings seemed reasonable based on travel and time expenses.

#### **Concerns:**

**Housing Study Review Committee Signatures**

<div>DocuSigned by:  8897E01299BC40E...</div>	Bill Florea	12/6/2023
Signature	Name	Date
<div>DocuSigned by:  AE8C057FDD2A485...</div>	Brian Toohey	12/5/2023
Signature	Name	Date
<div>DocuSigned by:  3C88F489A7A9485...</div>	Darin Preis	12/5/2023
Signature	Name	Date
<div>DocuSigned by:  3D6993A4ED4442E...</div>	Jennifer Deaver	12/6/2023
Signature	Name	Date
<div>DocuSigned by:  7CB805BF68564B4...</div>	Stephanie Browning	12/5/2023
Signature	Name	Date

Additional Reviewers Included: Kip Kendrick, Barbara Buffaloe, De'Carlton Seewood, and Carl Freiling

**EVALUATION REPORT FORM - 1st Evaluation Meeting on 9/11/23**  
**PURCHASING DEPARTMENT - BOONE COUNTY - MISSOURI**

**Request for Proposal: 23-25JUL23 - Housing Study for Boone County, Missouri**  
 Melinda Bobbitt, CPPO, CPPB, Director of Purchasing

**SCORING**

					<b>For Purchasing Use Only</b>	
	<b>NAME OF OFFEROR</b>	<b>Method of Performance (30 points)</b>	<b>Experience/Expertise of Contractor (20 points)</b>	<b>TOTAL SUBJECTIVE POINTS (50 pts.)</b>	<b>COST POINTS (50 pts.)</b>	<b>TOTAL POINTS (Max 100 pts.)</b>
1	Urban Partners (UP Development Planning, LLC)	29	19	48	34	82
2	Goldstone Consulting Group	10	11	21	37	58
3	TPMA Inc.	24	17	41	27	68
4	PGAV Planners	26	20	46	30	76
5	Amarach Planning Services	18	9	27	50	77

We hereby attest that the subjective points assigned to each offeror above were scored pursuant to the established evaluation criteria and represent our best judgement of the subjective areas of the offerors' proposals. We have attached a narrative, which highlights some, but not all, of the reasons for our evaluation of the proposals as indicated by the scores above. Our comments represent our opinions only and do not represent the position of the Purchasing Department of Boone County, MO or any other party.

**EVALUATION REPORT FORM - 3rd Evaluation Meeting On 12/4/23**  
**PURCHASING DEPARTMENT - BOONE COUNTY - MISSOURI**

**Request for Proposal: 23-25JUL23 - Housing Study for Boone County, Missouri**

Melinda Bobbitt, CPPO, CPPB, Director of Purchasing

**SCORING**

					<b>For Purchasing Use Only</b>	
	<b>NAME OF OFFEROR</b>	<b>Method of Performance (30 points)</b>	<b>Experience/Expertise of Contractor (20 points)</b>	<b>TOTAL SUBJECTIVE POINTS (50 pts.)</b>	<b>COST POINTS (50 pts.)</b>	<b>TOTAL POINTS (Max 100 pts.)</b>
1	Amarach Planning Services	28	11	39	50	89
2	Urban Partners (UP Development Planning, LLC)	24	17	41	31	72
3	PGAV Planners	21	20	41	25	66

We hereby attest that the subjective points assigned to each offeror above were scored pursuant to the established evaluation criteria and represent our best judgement of the subjective areas of the offerors' proposals. We have attached a narrative, which highlights some, but not all, of the reasons for our evaluation of the proposals as indicated by the scores above. Our comments represent our opinions only and do not represent the position of the Purchasing Department of Boone County, MO or any other party.

## 23-25JUL23 - Housing Study

<b><u>Original Proposal</u></b>	<b>Amarach Planning Services</b>	<b>Urban Partners</b>	<b>PGAV Planners</b>	<b>Goldstone Consulting Group</b>	<b>TPMA Inc.</b>
<b>Total Cost</b>	<b>\$92,250.00</b>	<b>\$135,000.00</b>	<b>\$155,000.00</b>	<b>\$125,000.00</b>	<b>\$174,837.00</b>

<b><u>BAFO #1</u></b>	<b>Amarach Planning Services</b>	<b>Urban Partners</b>	<b>PGAV Planners</b>
<b>Total Cost</b>	<b>\$86,373.75</b>	<b>\$135,000.00</b>	<b>\$155,000.00</b>

<b><u>BAFO #2</u></b>	<b>Amarach Planning Services</b>	<b>Urban Partners</b>	<b>PGAV Planners</b>
<b>Total Cost</b>	<b>\$86,373.75</b>	<b>\$142,000.00</b>	<b>\$172,460.00</b>