

REQUEST FOR PROPOSAL

RFP NUMBER: **21-01**

RFP SUBJECT: **MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY**

PROPOSALS SHOULD BE SUBMITTED TO:

Purchasing Agent
Town of Vienna – Vienna Town Hall
127 Center Street S
Vienna, Virginia 22180

OPTIONAL PRE-PROPOSAL

ZOOM MEETING: **OCTOBER 21, 2020 AT 10:00 AM**

SEALED PROPOSALS

DUE DATE AND TIME: **November 2, 2020 AT 11:00 AM**

**** ONE COMPLETE ELECTRONIC SUBMITTAL IS REQUESTED ****

All inquiries should be made, in writing, to Gina Gilpin, Purchasing Agent, at ggilpin@viennava.gov by **October 26, 2020 at 2:00 PM.**

In compliance with this Request For Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiations.

Name & Address of Offeror:
Streetsense

3 Bethesda Metro, Suite 140

Bethesda, MD 20814

EEl/FIN: 32-0023006

Signature:  Title: Managing Director, Public Non-Profit Solutions

(Date)

Printed Name: Larisa Ortiz

Phone: 718.205.5116

Email: lortiz@streetsense.com

October 22, 2020

ADDENDUM #1

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

(Must be completed and returned with response)

1. Q: What are your specific high-priority stakeholders?
A: The Town would like to hear from the Consultant about whom should be priority stakeholders to engage during this process. The Town will work with the selected Consultant to confirm a list of specific stakeholder groups.
2. Q: Helpful presentation! Would it be possible to get a list of the Consultants who attended this webinar to help facilitate partnering on this?
A: Yes, the attendee list is attached.
3. Q: Great project introduction. What is the anticipated start and end date of this project?
A: The anticipated start date is January 2021. There is no specific end date – the project will end when it is complete.
4. Q: Assuming the timeline of the zoning update work with Calfee Zoning will follow through 2021, can we tie in outreach and engagement process with Code Create Vienna efforts to avoid engagement fatigue?
A: Yes, the Town anticipates that the chosen Consultant will work with Planning and Zoning staff to combine outreach and engagement efforts where appropriate.
5. Q: For the vacant spaces and rate, would a secondary data source be adequate (such as CoStar) or are you hoping Consultant will collect primary data on vacant spaces in Vienna? Thanks!
A: The Town currently uses CoStar as a secondary resource. The Town anticipates that the Consultant will collect primary data on vacant spaces in Vienna.
6. Q: Are you requiring in-person public meetings, or is Vienna still using virtual meetings for public engagement?
A: The Town of Vienna is currently adhering to the guidelines under the Commonwealth's state of emergency in response to the health crisis and most meetings are virtual. Virtual meetings held by the Town may also include an in-person component that limits the number of attendees and adheres to social distance guidelines.
7. Q: Should any legal/insurance exceptions be required, are proposers required to use the 'Exceptions' form to submit? Or will this process be undertaken in negotiation phase?
A: Any and all exceptions to the solicitation must be listed on the Exceptions form and submitted with the proposal.
8. Q: The RFP is interested in having the proponent understand / evaluate neighboring jurisdictions that have the potential to impact or become economic generators for the Town. Do you have any specific jurisdictions in mind that are a must to be included? How far outside the Town would you like us to consider?

A: It is important to include at least Tysons as neighboring jurisdiction in your evaluation. However, the Consultant should be able to provide feedback about jurisdictions that the Town should consider in the evaluation process and the range of that consideration.

9. Q: Does the Town have strong relationships with/Has the Town previously engaged major property owners along commercial corridors on other planning processes? Does the Town anticipate having issues engaging with property owners?

A: The Town has more recently begun to engage and attempt to develop stronger relationships with property managers in commercial corridors. Because the economic development department is new to the Town the process of engagement may be a challenge.

10. Q: To what extent does the Town coordinate/collaborate on economic development strategy with the County?

A: The Town does not currently collaborate on overall economic development strategy with the County. However, on certain economic development related projects, the Town has worked with the County to implement and deliver them to the community.

11. Q: What is the timing of the Calfee Zoning work, particularly in terms of crafting language for commercial and mixed-use zones?

A: The Calfee Zoning work began in July 2020 and is anticipated to last for 18 months. The Consultant for this project will be expected to coordinate and share information with Calfee Zoning to understand the timing for crafting the language.

12. Q: The RFP states that the Contractor must work with Calfee. Does Calfee have a similar requirement to work with the Contractor for the market analysis and economic development study?

A: Yes, Calfee Zoning does have the same requirement and expectation to work with the Consultant for the market study and economic development strategy.

13. Q: What procedures is the Town of Vienna using during coronavirus pandemic for meetings? Do you intend for the meetings that are part of this study to be in-person or virtual?

A: The Town of Vienna is currently adhering to the guidelines under the Commonwealth's state of emergency in response to the health crisis. Most meetings are virtual with limited opportunity for in-person public meetings that account for appropriate social distancing measures. It is anticipated that the Town will negotiate which meetings should be in-person versus virtual during the duration of this project. The intention is to conduct meetings virtually as much as possible.

14. Q: Does the Town of Vienna currently have an inventory of vacant spaces that will be shared with the Consultant?

A: No, the Town does not have an inventory of vacant spaces to be shared with the Consultant.

15. Q: Will the Town of Vienna be able to provide the Consultant with information in an aggregate (summary) format from its assessment database summarized as laid out by Consultant (single-family, townhouse, multifamily for-rent, multifamily for-sale, office, retail, industrial, and tax-exempt (to avoid having the Consultant individually going through assessment records one at a time)?

A: Yes, the Town will work with the Consultant to provide information and resources that are needed (as much as possible in aggregate form). The Town may need to work with the County or other external organizations to receive information that will be necessary for the Consultant to complete the work.



TOWN OF
VIENNA
since 1890

Purchasing Office

16. Q: The deadline for questions is Monday, October 26th. Assuming that the Town receives many questions from prospective bidders, it might take one or two days for the Town to answer all the questions. Assuming that the Town replies to all questions by Wednesday, October 28th, that gives prospective bidders 3 business days (Wednesday, Thursday and Friday) to incorporate the Town's answers to those questions into their proposal responses in order to meet the Monday, November 2nd deadline. Will the Town consider extending the deadline a few days (maybe until Friday, November 6th) for the proposal response submission?

A: The Town intends to respond to any additional questions with an addendum no later than Tuesday, October 27, 2020. The deadline date for submission of proposals for this solicitation will not change and remains Monday, November 2, 2020 at 11:00 AM, via email.

17. Q: Our firm is currently reviewing RFP 21-01 and would like to submit the following question to help inform our understanding of scope of services. Are project reimbursables (e.g. travel/printing) included in the project budget of \$100,000? If not, what is the anticipated all-inclusive budget for the project?

A: The all-inclusive budget cost is currently \$100,000.

18. Section 5, 2, j reads: Cost Proposal: Provide proposed cost for completion of the scope of work as listed in the RFP.

Edited to add: Consultants should break out consulting work and any incidentals, including travel costs, if applicable.

19. The audio and video links for the Pre-Proposal Webinar have are posted on the project webpage at www.viennava.gov/econdevrpf

ALL OTHER TERMS, CONDITIONS, AND SPECIFICATIONS SHALL REMAIN THE SAME.

A copy of this signed addendum must accompany your response as an acknowledgment of its receipt:

NAME AND ADDRESS OF VENDOR:

Streetsense

3 Bethesda Metro, Suite 140 Bethesda, MD 20814

PHONE #: 718-205-5116 EMAIL: lortiz@streetsense.com

NAME OF AUTHORIZED REPRESENTATIVE:

Larisa Ortiz

Please Print

SIGNATURE:  DATE: 10/29/2020

Host Name	Email
Natalie Monkou	natalie.monkou@viennava.gov
Gina Gilpin	gina.gilpin@viennava.gov

Attended	Name	Email	Organization	Job Title
Yes	Catherine Timko	catherine@theriddlecompany.com	The Riddle Company	CEO/Principal
Yes	Mac McKenzie	mac.mckenzie@timmons.com	Timmons Group	Sr. Project Manager
Yes	Jon Stover	jstover@stoverandassociates.com	Jon Stover & Associates	Managing Partner
Yes	Jason Kipfer	jason@explorersolutions.ca	Explorer Solutions	Director of Economic Development
Yes	Jake Lovinger	jakelvnr5@gmail.com	Deaton Group LLC	Consulting Associate
Yes	Dean D. Bellas, Ph.D.	dbellas101@aol.com	Urban Analytics, Inc.	President
No	Curvin	cleatham@areaprobe.com	AreaProbe	Managing Member
Yes	Kyle Talente	kst@rkassociates.com	RKG Associates, Inc.	Principal
Yes	Anita Morrison	amorrison@pesconsult.com	Partners for Economic Solutions, LLC	Principal
Yes	Nur Asri	nasri@streetsense.com	Streetsense	Senior Research Strategist
Yes	Agnes Artemel	agnes.artemel@artemelassociates.com	Artemel & Associates	Principal
No	Michelle	mtierney@willdan.com	Willdan Financial Services - Washington, DC	Project Manager
Yes	Ron Thompson	rthompson@tcaanalytics.com	Thompson Consulting and Analytics	Owner/Principal Consultant
Yes	Molly McKay	mmckay@willdan.com	Willdan Group	Managing Principal
Yes	Matt Patton	mpatton@angeloueeconomics.com	AngelouEconomics	Senior Project Manager
Yes	Emily Otto	eotto@rclco.com	RCLCO	Office and Proposal Assistant
Yes	Tracy Lower	tracy.lower@timmons.com	Timmons Group	Group Leader - Metro DC
Yes	Jolena Presti	jolena.presti@bakertilly.com	Baker Tilly Municipal Advisors	Managing Director
Yes	JOLENA PRESTI	jolena.presti@bakertilly.com		
Yes	Steven Reilly	sreilly@hraadvisors.com	HR&A Advisors	Principal
Yes	Melina Duggal	mduggal@duggaladvisors.com	Duggal Real Estate Advisors	Owner
Yes	Stan Wall	swall@hraadvisors.com	HR&A Advisors	Partner
Yes	Richard Cutting-Miller	rrcm@resonanceco.com	Resonance Consultancy	Executive Vice President



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October 29, 2020

ADDENDUM #2

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

(Must be completed and returned with response)

1. Section 5, 2, f. reads: Statement of Qualifications: Provide a summary of the firm's/team's overall background, capabilities, experiences, and qualifications. Cite national experience drafting subdivision and zoning ordinances as well as experience working in Virginia and with similarly-sized jurisdictions

Edited to read: Statement of Qualifications: Provide a summary of the firm's/team's overall background, capabilities, experiences, and qualifications. Cite any national experience as well as experience working in Virginia and with similarly-sized jurisdictions.

ALL OTHER TERMS, CONDITIONS, AND SPECIFICATIONS SHALL REMAIN THE SAME.

A copy of this signed addendum must accompany your response as an acknowledgment of its receipt:

NAME AND ADDRESS OF VENDOR:

Streetsense

3 Bethesda Metro, Suite 140 Bethesda, MD 20814

PHONE #: 718-205-5116 EMAIL: lortiz@streetsense.com

NAME OF AUTHORIZED REPRESENTATIVE:

Larisa Ortiz

Please Print

SIGNATURE:  DATE: 10/29/20



Market Study + Economic Development Strategy

RFP# 21-01 — TOWN OF VIENNA

November 2, 2020 / Confidential

streetsense.

Gina Gilpin, Purchasing Agent
Town of Vienna - Vienna Town Hall
127 Center Street S
Vienna, Virginia 22180

November 2, 2020

Dear Ms. Gilpin,

We are pleased to present this RFP response to the Market Study & Economic Development Strategy RFP (RFP# 21-01) issued by the Town of Vienna. Our team is uniquely qualified to provide an unparalleled level of service to the Town as it seeks to develop a market-informed and consensus-driven economic development strategy.

Streetsense is an uncommon collective of creative thinkers who bring a diverse range of experience uniquely suited to support the following services requested in this RFP. Our team, which consists of both Streetsense and RCLCO Real Estate Advisors, includes a deep bench of experts in a variety of fields, including economic development, public policy, market research, small business technical assistance (particularly in the retail, food & beverage and hospitality industries), placemaking, marketing, and branding.

We are particularly committed to supporting and shepherding cities across the country to not just economic recovery, but vibrancy in the wake of the COVID-19 pandemic. Streetsense is supporting COVID recovery efforts in communities nationwide, working with Business Improvement Districts in New York and Virginia, as well as public sector agencies, including Montgomery County, MD and Sacramento, CA. We are also recognized thought leaders in COVID recovery and response, with a number of published guides on recovery strategies for the public and non profit sectors, as well as for the retail, food and hospitality industries. We are thrilled to bring this expertise and insight to bear on behalf of the Town of Vienna.

Your primary point of contact will be Larisa Ortiz, Managing Director of Streetsense' Public and Non-Profit Solutions Initiative. Larisa has over two decades of experience working for and with public and non-profit sector partners and is a well respected national expert in commercial and neighborhood economic development.

If you have any questions, please feel free to reach out directly. Thank you for considering Streetsense for this effort and we look forward to hearing from you.

Warm regards,



Larisa Ortiz
Managing Director
Public Non Profit Solutions
lortiz@streetsense.com
718.205.5116

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**Streetsense
Website**

www.streetsense.com

Office Locations

3 Bethesda Metro, Suite 140,
Bethesda, MD 20814 *(HQ)*

120 Blagden Alley, Suite 300,
Washington, DC 20001

10441 Jefferson Boulevard,
Culver City, CA 90232

Paseo de la Castellana 200,
28046 Madrid, SP

Contact

Larisa Ortiz
Managing Director
Public Non Profit Solutions
lortiz@streetsense.com
718.205.5116

SECTION 1

About Streetsense

Firm Profile

Who We Are

Streetsense is an uncommon collective of designers and strategists offering solutions in real estate, retail, food and beverage, hospitality, and the public sector. We specialize in branding and marketing, architecture, interior design, research and analysis, and operations. Our interdisciplinary approach contributes to dynamic, cohesive, and innovative projects and deliverables.

Founded in 2001 as a real estate strategy firm, Streetsense has evolved over the last 19 years in response to emerging needs in the market. Today, we are an agency of over 150 designers, architects, planners, brokers, writers, analysts, strategists, and more. We offer expertise across a variety of disciplines and industries, reaching outside the box to deliver dynamic, customized solutions. We create memorable places, distinctive brands, and meaningful experiences. We are constantly refining our approach and expanding our capabilities to offer the best service and the most innovative solutions.

Diversity of Experience

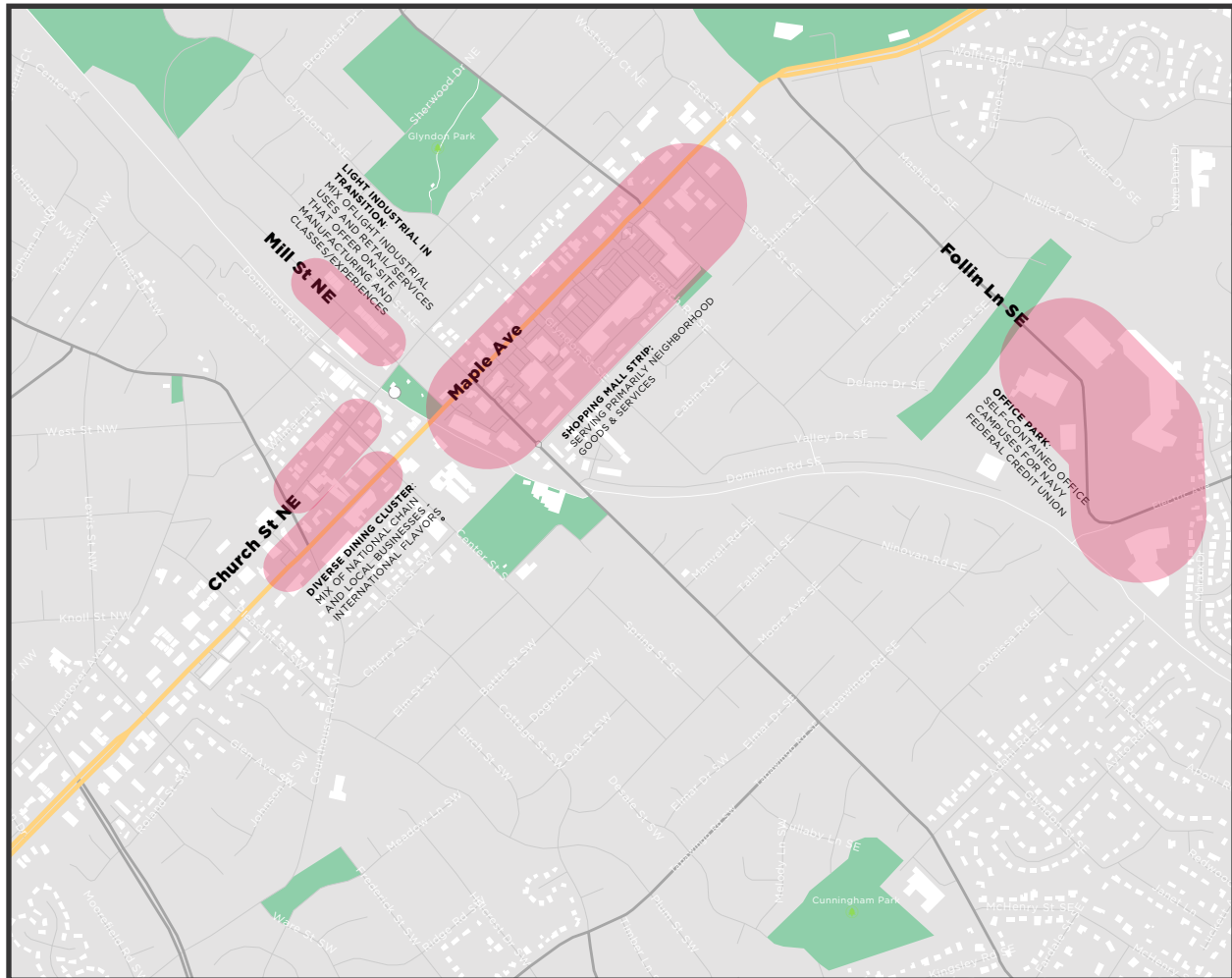
No experience is one-dimensional, so neither is our team. We combine the perspectives of a diverse team of specialists to examine each challenge through a variety of lenses and fully understand the opportunity — no blinders, no pre-conceptions. We have assembled an uncommon collective of strategists and designers uniquely positioned to tackle complex challenges in diverse communities. Our in-house talent includes retail strategists, brand strategists, architects, interior designers, web designers, chefs, researchers, analysts, graphic designers, and more.

Streetsense places people and human experiences at the center of the firm's work and the work process is one of user-focused research and discovery. Highly collaborative with the client throughout the entire process, the staffing of assignments includes those with professional and/or personal experience relevant to the project, lending perspectives that are academic, real-world and economically proficient. This highly unique and capable team represents fewer breaks in translation and communication.

SECTION 2

Our Approach

Project Understanding



Spanning 4.4 square miles, the Town of Vienna is a small town in rapidly growing and commercially competitive Fairfax County. Committed to its strategic planning goal of creating an economically prosperous community that is the “location of choice for unique, independent businesses”, the Town of Vienna has hired its first Economic Development manager and is looking to expand its business outreach and support initiatives in order to attract a healthy balance of industries, and enhance overall quality of life for residents and visitors. At this critical juncture in the Town’s evolution, particularly following a pandemic that has resulted in sales declines, small business closures, and rapidly changing consumer preferences, the Town is in need of a forward-thinking, clear, and actionable roadmap to guide business recovery and resilience efforts, as well as key investment decisions in the coming years.

Streetsense, in partnership with RCLCO, will bring forth its specialized knowledge of the DC-MD-VA region, experience working in diverse commercial districts across the country, and its comprehensive approach to market research that combines the value of quantitative and qualitative data to this project. Our goal is to provide direction to the Town on how it should be utilizing its resources in the near term to help revitalize its commercial nodes/clusters, and generate and diversify tax revenue following the pandemic - including attracting and retaining businesses, filling commercial vacancies, and creating vibrant places that people can safely return to. Our team's assessment of the commercial markets and our unparalleled industry expertise in retail, hospitality, and placemaking will help inform a strategic set of economic development tools and strategies (i.e. policy, program, capital improvement) that leverages the Town's competitive advantages, mitigates its proximity to major competitors, and is adaptive to industry trends and consumer preferences.

Our Approach

We believe that every community has a unique set of characteristics that shape opportunities for economic growth and success. This includes local retail and service offerings, employment opportunities, market demand and spending characteristics, anchors and destination drivers, and overall access and transportation patterns. We call these characteristics the “Commercial DNA” of place. Helping our clients understand how to harness these assets to create an environment in which commercial activity can thrive is the primary focus of our work product.

Our approach, further laid out in the Technical Approach section, considers four key areas of analysis – Physical Environment, Business Environment, Market Data and Demographics, and Administrative Capacity – with the goal of developing a comprehensive and market-informed understanding of town conditions that will guide the development of tools and strategies to ensure equitable and sustainable success of businesses in each commercial node/cluster.

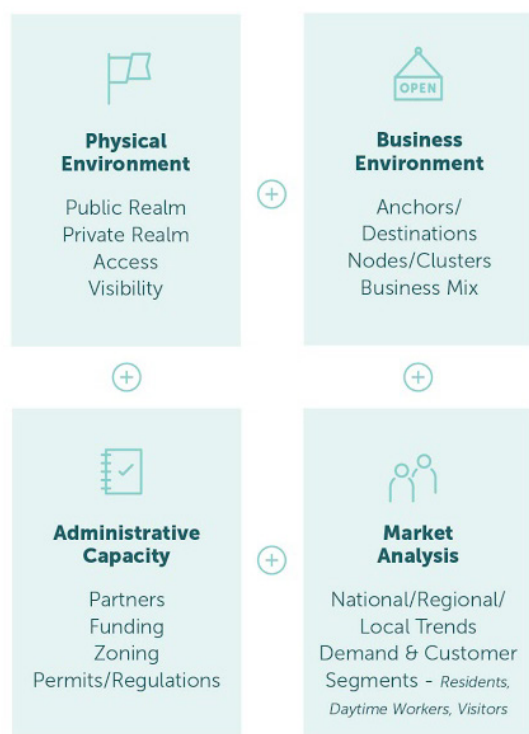


Figure 1 The Commercial-DNA approach is an award-winning planning tool recognized by the American Planning Association (APA) and the International Downtown Association (IDA).

Physical Environment

The conditions of the physical environment “set the stage” for consumer experiences that culminate inside a local business and ideally, result in a consumer expenditure. As such, our approach includes developing a comprehensive understanding of the strengths and weaknesses of the physical environment that can be addressed with targeted capital investments and policies that improve the public and private realms.

A physical assessment is also rooted in understanding issues of accessibility and visibility, which affect the utility of commercial areas as destinations of choice for residents, visitors and employees alike. Understanding impediments to access, visibility and circulation for the user — is

fundamental to ability to develop recommendations for place based improvements. Our analysis looks closely at how each commercial node is accessed by a variety of transportation modes, including automobile, bike, walking or public transit.

Business Environment

The conditions of the local business environment include existing supply of uses (retail, offices, industrial) in each cluster, including quantity, quality, type, and competitive supply, including quantity and type, which each play a role in how successful the Town is in meeting the needs of businesses, office users, and shoppers. In addition, our team will also consider local anchors and destination drivers.

Market + Demographic Data

Sufficient market demand and purchasing power is critical to a healthy and sustainable commercial node. It is the fundamental building block upon which we build economic development policy and recommendations. To assess the full extent of demand and local buying power, we will consider spending by different customer groups including residential and non-residential demand – daytime workers, students, hotel guests. For full details on data collection methods, please refer to the Methodology Section of this proposal.

Administrative Capacity

The successful execution of commercial district improvements, real estate development, business policies, and strategies will require a viable organization or entity with the expertise, know-how and authority to carry out and advocate for resources and investments. As part of our approach we consider the Clients' capacity to execute, and take into consideration the unique public sector tools and policies available to our client. These become the basis of our recommendations and action plan. We also consider the degree to which additional funding resources are required to support the effort, and the extent to which local leadership and partners must be engaged to support plan implementation.

We further recognize the role the the regulatory framework and public policies play in defining the rules of the game for businesses.

We all know that the pandemic has been a game changer for our communities. Making economic development strategies or long-term plans has never been this challenging. Streetsense is well-positioned to help the Town tailor its efforts to each unique commercial corridor and cluster.

To assist the City in its economic development efforts, we propose the following course of inquiry, discovery, strategy, and recommendation.

Technical Approach

Phase 1 — Immersion + Discovery

Task 01 — Kick Off + Background Document Review

Streetsense begins every project with a kickoff meeting with all project stakeholders (as jointly determined with the Client) to establish baseline expectations for the work ahead. This first meeting is critical to ensuring timely and high-quality delivery of project tasks and will include a discussion to define study area boundaries and aspirational districts for comparison, survey needs, and align project objectives, methodology, schedule, deliverables, and protocol for communications and file transfers between project managers (on both the Client and Consultant Teams).

After over 35 years of combined retail market analysis experience, Streetsense has crafted a multi-variate retail market analysis model that analyzes the existing retail inventory and each population segment that supports it. During the kick-off meeting, Streetsense will review our methodology (as presented in the following tasks) in great detail, including how trade areas are delineated, what data sources may be used during each task, and other methods.

In addition, we look forward to tapping into the Client Team's collective knowledge regarding the business environment, including recent policies and strategies impacting retail, office, and industrial development, any zoning considerations, planned development/consolidation efforts, etc.

Prior to the meeting, Streetsense will also review any publicly available data and relevant background documents, including area and comprehensive plans, previous demographic/market studies and industry reports (including that of competitive districts) that can help inform our understanding of conditions on-the-ground. Any gaps in background information will be established with the Client at the kickoff meeting.

Key Deliverables: Meeting Agenda, Meeting Notes, Project Contact List

Task 02 — Site Visit (Physical Assessment) + Inventory of Existing Supply

The first and most important step in our diagnostic approach is conducting a site visit of each commercial cluster - Maple Avenue, Church St, Mill St, Follin Lane. This visit will enable the team to gather field data based on predefined study area boundaries, including conducting an observational assessment of the public realm/ storefronts/ access/ visibility and collecting an inventory of ground floor commercial spaces.

Streetsense prides itself in collecting data using primary source methods. We have found, in previous experience, that CoStar's tenant lists, Reference USA, and other proprietary sources do not provide an accurate depiction of real estate occupancy - particularly during a pandemic that has significantly altered the realities of in-person sales and the ability of tenants to maintain physical locations in markets across the country. For example, their software lists often include retail that both historically and currently occupies the space, resulting in double-counting of total square feet. Our team will go site-by-site to inventory and identify the current businesses (including stores, service providers, and eating establishments) as well as record the address, store name and category/type, occupancy status, and estimated square footage of each retail-occupied and retail-appropriate space. This information will be employed as a methodology to calculate "modified inventory." Streetsense created this technique to assign a Class of Space (A, B, or C) to each retail-occupied or retail-appropriate space. The living inventory should serve as a resource for the Town to continually update its tenancy in commercial clusters beyond this project.

Key Deliverables: Site Visit photos, CSV/Excel Inventory of commercial spaces in each node/cluster (as determined at kick-off meeting) that may be easily modified/used by the Town to be geo-located on digital maps.

Main Street Ground Floor Map. Based on approximate ground floor space measurements by Streetsense in November 2018.

WARD ST			WARD ST			NORTH ↑
(Development Site)			Dental Center at Hackensack	394	Office	
Embroid Me	381	Office	Greater Bergen Community Action	392	Office	
Signarama	379	GAFO	Noches De Columbia	382	F&B	
DVL Consulting	375	Office	Bull Shark Mixed Martial Arts	382	NG&S	
Greater Alliance	359	Office	-	378	Vacant	850 SF
			Braverman & Lester Attorneys at Law	372	Office	
PASSAIC ST			PASSAIC ST			
Philip Carco Jr. Learning Center	355	Office	Edible Arrangements	350	GAFO	
ES Body Fitness	343	NG&S	Bergen Optometry	348	Office	
Hackensack Physical Therapy	343	NG&S	Main Salon	346	NG&S	
Dominos Pizza	339	F&B	Colombia Bakery	346	F&B	
Medical	337	Office	Creations in Glass	344	GAFO	
Jackson Hewitt Tax Service	335	Office	Metro PCS	342	GAFO	
Subway	333	F&B	Rinconito Musical	338	GAFO	
Save Way Discount	333	GAFO	-	336	Vacant	2,400 SF
Paula's Soul Food	331	F&B	Bonanza Colombian Delights	336	F&B	
-	329	Vacant	Yay Scrubs	336	GAFO	
Main Street Eye, Inc.	327	Office	-	330	Vacant	5,700 SF
Manhattan Leather and Jeans	325	GAFO	Giant Farmers Market		NG&S	
BERRY ST			BERRY ST			
Orlando Bank	321	Office	Some's Uniforms	310	GAFO	
EMA Martial Arts	307	NG&S	Rivers Lounge	308	F&B	
Citrus Cafe	305	F&B	Andrew's Travel	306	Office	
Record King	303	GAFO	Marlo Pizza	306	F&B	
301	Office		Hackensack Wireless	302	GAFO	
Santa's Beauty Salon	301	NG&S	Servicio Express	300	NG&S	
Thomas & McCarter Law Office	299	Office	Tentaciones	300	GAFO	
Special Services	295	Office	Hair Salon	298	NG&S	
Gateway High School Venture Program	293	Office	Pho Saigon	296	F&B	
Health Care	291	Office	-	290	Vacant	800 SF
Cricknet	289	GAFO	-	290	Vacant	800 SF
Bohemia Restaurant	287	F&B	Unseek Fashions	288	GAFO	
CAMDEN ST			CAMDEN ST			
Digital DJ Gear	5 W Camden	GAFO	Johnson Public Library			
Musically Yours	283	GAFO	El Tango Argentina Grill	270	F&B	

1,200 SF

5,700 SF

800 SF

800 SF

DOWNTOWN HACKENSACK MERCHANDISING PLAN AND STRATEGIES | 31

Task 03 – Consumer/Business Survey + Discovery Conversations

Pending Department of Health guidelines and the preferences of stakeholders, the team may conduct meetings over video conference or via safe, socially distanced stakeholder engagement in-person through 1-on-1 interviews or small focus group discussions organized by interest groups – e.g. retail/restaurant/service businesses, major employers, property owners, Town officials (e.g. Town Manager, Planning and Zoning, Public Works), and trade groups such as the Vienna Business Association-Vienna Chamber of Commerce, etc. Streetsense will look to the Client to support outreach to key local stakeholders.

As health restrictions lift in the County and Town, our team may elect to conduct discovery conversations in the form of interviews and small focus group discussions in-person in large venues that enable social distancing, for example in a school gym, community center, library, or museum hall.

Alternatively, virtual engagement may be conducted to protect the health and safety of stakeholders through web conference call apps (Zoom, Microsoft Teams, etc.). As with an in-person meeting, our team will record and illustrate discussion notes in real time through digital applications such as Adobe Illustrator, Miro and MindMeister.

Based on our team's experience conducting stakeholder engagement across several planning projects, particularly during the pandemic, we understand that engagement fatigue is a common and likely factor to consider in the engagement efforts of this work. As such, where appropriate, our team will coordinate closely with the selected zoning consultant (Calfee) to ensure any business owner outreach aligns with engagement efforts as part of the zoning update efforts.

For stakeholders who are unable to attend virtual/in-person focus groups or interviews, our team will prepare customized short surveys requiring no more than 10-15 minutes of a respondent's time to collect information from either local consumers or businesses - depending on the data needs of the Town as determined at kick off. Surveys will prioritize multiple choice questions to garner a higher response rate and to allow for more accurate analysis of results. To ensure the Town is able to quickly distribute surveys, access results, and respond to any queries from stakeholders regarding the survey, our team recommends the Town set up and host the survey for at least three weeks. Our team will then provide the Town with any communications and outreach support to ensure higher response rate of surveys, and conduct analyses of results that will help inform the parameters of the market study in Phase 2 and recommendations and strategies in Phase 3.

***Key Deliverables:** Draft and final survey, in-person meeting/focus group agenda and summary notes, virtual meeting agenda, video recording, summary notes (alternative).*

Phase 2 — Diagnostic

Task 04 - Administrative Capacity Assessment

Through interviews and review of any regulatory text and zoning ordinances (including draft zoning updates by Calfee) that inform the physical environment of each commercial cluster (e.g. signage restrictions, outdoor dining permits, awning, window and roll-down gate requirements, etc.), the team will assess strengths and weaknesses of the Town's existing regulatory frameworks and processes in encouraging innovative storefront marketing design, co-location and clustering of synergetic business activities, and in ensuring easy access and visibility of businesses in each cluster.

Through years of direct experience assisting retail and restaurant businesses open and expand operations in various localities, Streetsense is able to leverage its wealth of knowledge to determine any shortcomings of Town permitting and regulatory processes, especially as it relates to business success and vibrancy of commercial corridors.

Case Study: East Farmingdale Form-Based Code & Port Chester Neighborhood Revitalization Strategy

Our team's market analysis work in East Farmingdale (New York) and Port Chester (New York) have supported the development of form-based codes for both communities. These zoning changes will increase flexibility of commercial uses in the downtown and transit-oriented districts and will continue to enable landlords and tenants to easily adapt commercial spaces based on market realities.

Case Study: City of Cambridge Retail Market Study and Strategic Plan (recipient of 2018 IDA Pinnacle Achievement Award and 2019 APA Donald E. Hunter Award for Excellence in Economic Development)

In 2018, our team released the citywide retail strategic plan which included several recommendations to address regulatory barriers to business vitality. Our assessment of local zoning found the current table of uses in its zoning ordinance was creating unintended consequences for many small businesses that are seeking creative ways to remain competitive. As such, the City has since adapted its commercial land use classification to allow for flexible and new retail formats

Task 05 — Retail Market Assessment - Retail

We have a staff dedicated to the exclusive study of retail environments because it is an ever-evolving and highly nuanced field. Below, you will see that our approach to market analysis is highly refined and practical, not aspirational. This process has been fine-tuned and continues to be re-evaluated to ensure that we are able to provide the best possible estimates of market supported retail demand in 2025 and 2030 (the rapid changes in the industry and the evolution of the retail landscape yield an unpredictable outlook for customer sales past this time frame).

Competitive Retail Assessment

Streetsense will prepare an assessment of competitive retail supply. Given that the commercial clusters are relatively close to each other (within 12-15 min drive), Streetsense will prepare a single assessment of local competition for customers in the market. In addition to the impact of the existing submarkets on each other, we will review the impact of malls and other retail districts irrespective of jurisdictional boundaries as customers do not make typical spending decisions based on political lines. This will include an assessment of a range of competitors, from convenience-based/ neighborhood retail districts to destination/ experience-based districts - including those initially mentioned by the Client (Tyson's Corner, Mosaic District, Oakton, Reston). It is the purpose of this analysis to ensure that each commercial cluster in the Town is complementary (not competitive).

Trade Area + Customer Profile Analysis

Based on information gathered in the previous tasks, we will evaluate and draw primary, secondary, and, if appropriate, tertiary trade areas for each of the retail clusters. The density, customer profiles, and spending patterns within each of these trade areas will begin to identify how expenditures throughout this area are distributed, and who the existing and potential customer bases are for each international retail cluster.

Demographic and customer spending reports for residents and employees will be generated through ESRI and Claritas, a Nielsen company, using US Census Bureau and Bureau of Labor Statistics data, among others. Our team will begin to develop customer profiles for each of the study areas, including details such as targeted age range, household composition, country of origin of any foreign-born populations, salary, commuting patterns, and total amount of expenditures by retail category.

In addition to residential- and employee-generated retail demand, we may assess the impacts of spending by atypical populations (if significant). These population categories may include hotel guests, students, or commuters. These customer groups also increase retail demand in a manner that needs to be evaluated in a technical manner (i.e.

quantified current and projected population growth and retail expenditures), and our team has the necessary tools and data to measure how much additional retail demand is derived from each of these customer groups.

Demand Calculation

After understanding the customer profiles for each retail cluster and compiling information about total customer spending for each retail category (a) Neighborhood Goods & Services, (b) Food & Beverage, and (c) General Merchandise, Apparel, Furnishing & Others, capture rates will be assigned. Capture rates for the retail at each cluster will be influenced by current competition and projected development in the market, accessibility/ visibility issues to the customer, industry changes, and technology innovations.

Streetsense has a reputation for being practical and conservative with assigning capture rates to ensure a balance in the market. We will translate that approach to each cluster to avoid the risk of retail vacancy and ensure the long-term viability and vibrancy of commercial districts. After capture rates are assigned, retail demand will be calculated as total square feet per retail category.

Almost all neighborhoods throughout the nation experience leakage. While retail leakage gap/opportunity reports are considered in Streetsense's analyses, our approach to market is more specific. By assigning a capture rate, or percentage likelihood for customers to patronize retail offerings within each submarket with respect to competition, travel behaviors, and convenience, Streetsense is able to provide a more accurate estimation of how much additional square footage is supportable in each submarket.

Almost all neighborhoods throughout the nation experience leakage. While retail leakage gap/opportunity reports are considered in Streetsense's analyses, our approach to the market is more specific. By assigning a capture rate, or percentage likelihood for customers to patronize retail offerings within each submarket with respect to competition, travel behaviors, and convenience, Streetsense is able to provide a more accurate estimation of how much additional square footage is supportable in each submarket.

Task 06 — Office Market Assessment

RCLCO has long-tenured experience working throughout Northern Virginia to evaluate how economic and employment trends intersect with property/building characteristics and location dynamics to influence how office markets grow, develop, and evolve. For towns such as Vienna that have a largely built-out character, our process starts with understanding the competitive landscape and identifying the town's existing strengths and locational advantages relative to nearby areas - who are your current office users and why have they located here? What types of office spaces does the town offer and are there opportunity sites for new or redevelopment to add to the supply? How does all of this compare to neighboring jurisdictions and other similar communities throughout the metro area? Is there likely to be an impact based on the development pipeline elsewhere?

We will then employ forward-looking analytics to evaluate market demand in the context of future employment dynamics, and trends in office space use more broadly. Our analysis will identify target industry segments and tenant types, and seek to demonstrate opportunities that are possible but perhaps yet to be realized within the local market and how to get there.

Market data is only as useful as its applicability and our effort contemplates not only characterizing facts on the ground and growth patterns, but also in highlighting the town's continued evolutionary potential and outlining ways in which the office market might support, organize, and harness that growth. RCLCO's work will seamlessly integrate with Streetsense' analysis so that the retail assessment incorporates the team's collective view on office market potential and the impact to retail demand from any changes in employment.

Task 07 — Industrial Market Assessment

In concert with the office market assessment, RCLCO will also conduct a similar assessment for the Industrial market in Vienna. While the underlying data collection and demand forecasting methodology for industrial is similar to office, industrial presents several broader strategic questions for the town and the consulting team to address, including:

- what is the long-term role of industrial for the town's economic development?
- What types of uses are industrial spaces actually playing host to?
- And finally, what is the longevity of actual industrial businesses in their current spaces?

RCLCO recognizes that in many cases the town's land use goals may be in conflict with the infrastructure and physical space needs of industrial businesses over the long term. Our goal in the industrial market analysis will be to better define the current economic contributions and future potential of industrial businesses to the City, and to evaluate which industrial sectors and spaces need to be enhanced and protected versus which ones should be considered for a transition to other uses.

Task 08 – Summary of Diagnostic

Following the work completed above, Streetsense will then summarize findings in an annotated presentation deck. The overall findings will feed into a simple risk and opportunity matrix for each cluster across all assessment categories – Physical Environment, Business Environment, Market Demand, Administrative Capacity. The matrix will enable the team to shortlist top 4-5 gaps for improvement that will help strengthen and preserve businesses in each commercial node/cluster.

Key Deliverables: *Draft and final Summary of Diagnostic*

Task 09 – Virtual Open House

It is at this critical juncture that our team will hold a virtual open house to engage with a wide range of stakeholders, including those previously engaged in Discovery Conversations, to present findings from the diagnostic and to educate on the realities of the marketplace prior to building consensus on the direction of the action plan and recommendation research in the following phase.

Our team will work closely with the Town to determine the appropriate digital tools and platforms to use for this engagement. For example, Zoom may be used as the meeting platform and its break out room feature may then be utilized to enable smaller group visioning exercises.

Key Deliverables: *Open House agenda, run-of-show, facilitator materials, video recording of meeting, and summary notes.*

Phase 3 — Action Plan + Economic Development Strategy

Task 10 — Develop Draft Strategies and Recommendations

Following the open house, Streetsense will identify policy or program tools, or capital improvement projects, that the Town can take the lead on implementing, and that address each of the areas identified as gaps for improvement. For example, if the customer base has been identified as rapidly changing with new lifestyle and spending preferences, then strategies should work to support existing retailers in adapting merchandise and marketing to meet the changing needs of residents.

Towards developing the new tools for the Town, the Consultant will assess the existing landscape of Town business programs and policies to understand the successes/ failures of each tool to-date. This is critical to understanding the level of public buy-in that any newly proposed tool will be met with, as well as level of resource commitment that may be dedicated to new programs and tools.

Streetsense will then leverage its national experience and in-house expertise (Placemaking + Branding/Marketing) developing economic strategic plans for diverse commercial districts and propose additional tools that may be applied Town-wide or that are unique to each commercial cluster. Specifically, the revitalization plan may include recommendations in the following broad categories:

- Physical Improvements/Redevelopment, including capital improvements to the public realm (i.e. public spaces and issues of public access) and private realm (privately owned properties) that will result in a healthier and more attractive business environment, and programmatic interventions to support and/or incentivize private sector investments in real property improvements.
- Business Mix/Tenant Attraction + Retention, including recommendations for optimum tenant mix, that is reflective of community needs and market appetite. We will also consider strategies that support the retention and/or expansion of existing businesses.
- Sales/Promotion + Marketing, including activities that will drive visitation and raise awareness of Rivertown's offerings, particularly through digital platforms.
- Administrative Capacity, including strategies to address issues of capacity that might otherwise impede implementation, as well as recommendations to address regulatory or zoning issues that impede business growth and vitality.

Each of these strategies will be informed by relevant case studies that will help the team form a robust understanding of estimated time for implementation, estimated cost of implementation, likely partners needed for implementation (Public agencies, Private property owners, developers, and businesses, Non-Profit organizations, etc.) and potential sources of funding (including Federal, State, Local and Philanthropic).

In recent years, our team has developed a number of award-winning citywide and neighborhood/commercial district strategic plans that have continued to guide our clients' economic development efforts. Our plans, rooted in market conditions and on-the-ground realities, never sit on the shelf. Furthermore, our plans have also become critical advocacy documents that have been used to strengthen several communities' applications to national and state grants, including National Endowment for the Arts Our Town Placemaking and NY State Main Street Technical Assistance.

In light of recent global and national events, it is especially critical for municipalities to establish robust plans and implement preventive, rather than reactive, measures to support and sustain small, diverse, and local businesses. Streetsense is able to leverage its wealth of experience in delivering actionable strategic plans for cities, towns and neighborhoods across the country.

Case Study: Downtown Memphis Retail Market Study + Action Plan (Tennessee)

As part of the market study and stakeholder visioning for downtown Memphis, our team determined that building a strong critical mass of businesses and retail activities within existing commercial nodes was a key guiding principle. However, the Downtown Memphis Commission (DMC) did not have the administrative capacity to conduct robust business attraction and retention efforts. Hence, a recommendation was made by our team to dedicate staff time to oversee tenant attraction and retention. The new staff person who has since been hired by DMC oversees the expansion of the Open on Main Pop-Up program and the implementation of a retail tenant improvement grant program that has approved its first grant for Paper & Clay, a micro-manufacturing business relocating to South Main.



Following an initial presentation to the Client Team and any major stakeholders, Streetsense will incorporate any feedback provided and work toward finalizing the action plan and economic development strategy, including providing a Key Performance Indicator for each tool so that the Town may evaluate its successes post-implementation.

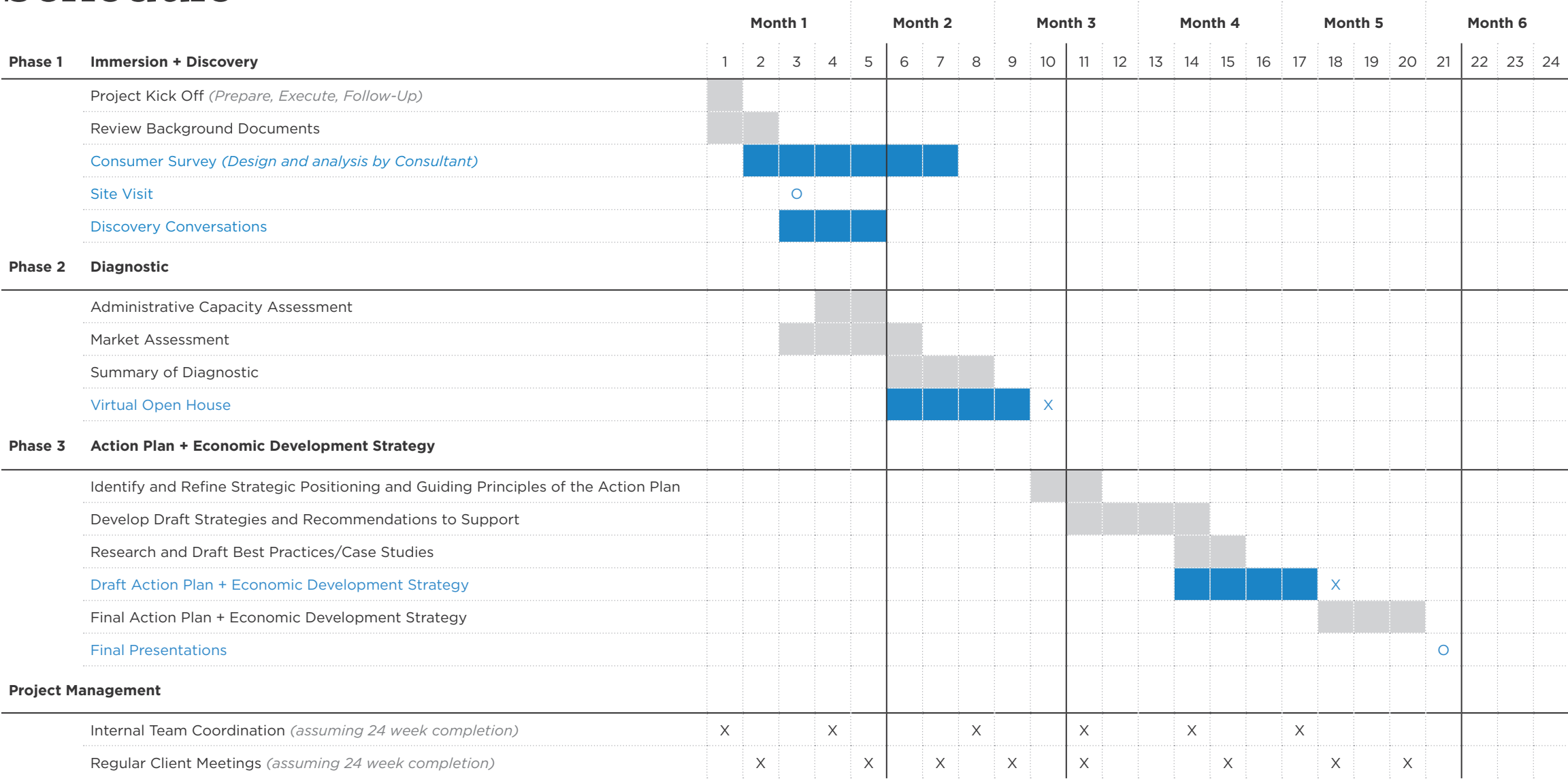
Key Performance Indicators are measurements that express impact through numbers or ratios. Recommendations for tool specific KPIs will also include suggested entities responsible for measuring and tracking the impact of these improvements over time. As such, Streetsense will focus on “fit for use” measurements that can be easily tracked by the implementing entity or by a county-wide organization with resources for evaluation. These KPIs will go beyond simply measuring sales on business impacts owing to the likely difficulty of collecting accurate sales data and the widely understood challenges associated with determining causality between projects and business impacts.

Key Deliverables: Interim presentation on key findings, draft tools and recommendations, final tools and recommendations.

Task 11 – Final Action Plan

A detailed actionable report will be delivered that includes key findings from Phase One, Phase Two, and Phase Three of the work to be reviewed by the Client Team. Pending any final feedback by the Client, Streetsense will work toward preparing a final outward-facing report and presentation that the Town can use to continue advocating for resources and public buy-in.

Schedule



BLUE — Indicates tasks as part of community engagement
O — In Person (pending loosening of pandemic restrictions)
X —Virtual via Zoom Conference Calls (local participants may elect to gather in person)

End of Phase 1: Immersion + Discovery End of Phase 2: Diagnostic Project Completion

Budget

Phase 1	Immersion & Discovery	\$16,965.00
	Project Kick Off <i>(Prepare, Execute, Follow-Up)</i> Review Background Documents Consumer Survey Site Visit - Physical Assessment Discovery Conversations	
Phase 2	Diagnostic	\$50,240.00
	Administrative Capacity Assessment Market Assessment - Retail - Office - Industrial	
Phase 3	Action Plan & Economic Development Strategy	\$24,485.00
	Project Management	\$7,060.00
	Total Fee	\$98,750.00
	Estimated Reimbursables	\$1,250.00
	Total Not to Exceed	\$100,000.00

SECTION 3

Qualifications

Organizational Chart

TEAM LEAD, PUBLIC NON-PROFIT SOLUTIONS



Larisa Ortiz
*Managing Director,
Public Non-Profit*



Nur Asri
*Senior Research Strategist,
Research + Analysis*

RETAIL ANALYSIS



Heather Arnold
*Principal,
Research + Analysis*



Tom Colicchio
Research Analyst



Baiwei Zhang
Research Analyst

EXPERT ADVISORS



Colin Greene
*Managing Director,
Planning*



Thomas Frank
*Executive Director,
Marketing*

OFFICE + INDUSTRIAL ANALYSIS





Larisa Ortiz

Managing Director, Research + Analysis

May 2019 – Present

Larisa brings over 20 years of experience advising public, private, and non-profit sector clients on retail real estate. While with Streetsense, Larisa has led Destination Tourism Plans for Puerto Rico.

Prior to joining Streetsense, Larisa founded Larisa Ortiz Associates, leading award-winning projects including The City of Cambridge Massachusetts Retail Strategy, The City of New York's Commercial District Needs Assessment, and the formation of the first Business Improvement District in Latin America. Larisa is the author of Improving Tenant Mix, published by the International Council of Shopping Centers, and currently serves as a Mayoral Appointee to the NYC Planning Commission. She also serves on the Boards of the International Downtown Association, the Coro New York Leadership Center, the National Advisory Committee of the ICSC P3 Retail Program and is Co-Chair of the City of New York's OneNYC Plan Advisory Committee.

A Fulbright Scholar and Watson Fellow, Larisa has traveled the world studying successful downtown and mixed use environments. She holds an undergraduate degree from Wesleyan University and a master's in city planning with a certificate in urban design from the Massachusetts Institute of Technology.

SELECT LEADERSHIP POSITIONS

- Commissioner, New York City Planning Commission
- Co-Chair, Mayor's Sustainability Advisory Board, One New York Plan
- Board Member, Coro NY Leadership Center
- Board Member, International Downtown Association (IDA)
- Advisory Committee Member, National P3 Retail Program, International Council of Shopping Centers (ICSC)

EDUCATION

Massachusetts Institute of Technology, Boston, MA

Master in City Planning Certificate of Urban Design

Wesleyan University, Middletown, CT

Bachelor of Arts with Honors, College of Social Studies

**A multidisciplinary major focusing on Economics, History, Political and Social Theory and Government*

Larisa Ortiz

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streetsense.

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new york, ny 11372
streetsense.com

WORK EXPERIENCE

Founder & Principal, Larisa Ortiz Associates (LOA)

November 2008 – May 2019, Jackson Heights, NY

National Program Director, Commercial Markets Advisory Service/ MetroEdge Local Initiative Support Corporation (LISC)

May 2007 – October 2008, New York, NY

Senior Project Manager, New York City Economic Development Corp.

Jan. 2006 – May 2007, New York, NY

Planning & Real Estate Development Project Manager, Jonathan Rose Companies (JRCo)

Sept. 2003 – Dec. 2005, New York, NY



PROFESSIONAL ACCREDITATIONS

- Planner, American Institute of Certified Planners

MEMBERSHIPS

- American Planning Association
- Urban Land Institute
- International Downtown Association

PUBLICATIONS

- Will Opportunity Zones translate to Community Economic Development? (2019)
- Mall-to-Mixed Use Phenomena (2018)

TEACHING

- Pratt Institute
Guest Lecturer, Graduate Center for Planning and the Environment / 2018- Present

EDUCATION

Pratt Institute, New York, NY

Master of Science with Honors, City & Regional Planning, 2016

University College of London (Bartlett), London, United Kingdom

Bachelor of Science, Urban Planning, Design and Management, 2014

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new york, ny 10010
streetsense.com

Nur Asri, AICP

Senior Research Strategist, Research + Analysis

Nur is a community planner and economic development strategist committed to building equitable neighborhoods and strengthening downtowns and mixed-use places.

At Streetsense, Nur brings hands-on project management experience and advises cross-sector clients on retail and development strategy in urban environments. Nur leads retail market assessments through data collection, trend and comparable analysis, supply and demand projections, and best practice research to inform key policies, programs, and capital investment strategies. Most recently, Nur has shared her expertise on retail trends and community development practices at panels for regional and national industry tradeshow including the International Downtown Association and American Planning Association.

Nur's specialty is in translating technical findings and research into simple graphic language for communication and advocacy tools. She continues to apply her research, design thinking, and communications experience.

KEY PROJECTS

- Nassau Hub
Uniondale, NY
- Port Chester Neighborhood Revitalization Strategies
Port Chester, NY
- Downtown Hackensack Merchandising and Action Plan
Hackensack, NJ
- City of Cambridge Market Study and Retail Strategic Plan
Cambridge, MA
- Downtown Memphis Retail Study and Action Plan*
Memphis, TN
- Downtown Revitalization Initiative (Empire State Development)*
Middletown/ Albany/ Watkins Glen/ Hudson, NY
- Replace with Downtown 2.0 Livingston County District
Livingston County, NY
- Downtown Alliance Pandemic Readiness Guide + Support for Small Businesses
New York, NY

**Work completed as Larisa Ortiz Associates*



Heather Arnold

Principal, Research + Analysis

July 2010 – Present

As Principal of Research + Analysis and Managing Director of Public Sector work at Streetsense, Heather specializes in retail market analysis, incentive planning, and merchandising for downtown environments. With over 20 years of experience, Heather has made incredible strides toward shaping urban commercial landscapes and increasing access to opportunities in underserved neighborhoods. In this pursuit, she has been a catalyst for meaningful change — from repositioning malls toward active uses to creating community where surface parking once dominated. With an expert eye toward the development and implementation of retail solutions, Heather brings data-driven strategy to communities in need.

SELECT LEADERSHIP POSITIONS

- Leadership Committee Member, The Commercial Real Estate Association (NAIOP)
- Diverse Retail Councilmember, International Downtown Association
- Member, Land Economics Society
- Board of Directors, Preservation Maryland

SELECT PUBLICATIONS

- Vibrant Streets (2013)
- Diverse Retail Issues Council
“Newcomer vs. Long Time Resident”

TEACHING

Georgetown University;

Adjunct Professor of Real Estate
2014 - Present

EDUCATION + CREDENTIALS

Cornell University, Ithaca, NY

Master of Arts, City and Regional Planning / 1994

University of Virginia, Charlottesville, VA;

Architectural History / 1992

KEY PROJECTS

- Detroit Neighborhood Retail Opportunity Study
Detroit, MI
- City of Fredericksburg
Market Analysis + Small Area Plan
Fredericksburg, VA
- Potomac Yards
Retail Market Analysis
Alexandria, VA
- Economic Development + Transportation Master Plan
Elyria, OH
- Great Streets Market Assessments
(Deputy Mayor for Planning + development)
Washington, DC

Heather Arnold

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harnold@streetsense.com

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EDUCATION + CREDENTIALS

Georgetown University School of Continuing Studies Washington, DC

Masters in Real Estate –
Finance Concentration
Expected graduation – 2020

Washington and Lee University Lexington, VA

Bachelors of Arts – English and
Religion double major
2011

Tom Colicchio

Research Analyst

March 2020 - Present

Tom brings a unique mixture of economic development and commercial real estate experience to the team, and through his work has experienced the perspectives of both the public and private sectors.

Prior to joining Streetsense, Tom worked on the business development team of the Alexandria Economic Development Partnership. He helped spearhead the Partnership's tenant retention program and worked with business decision makers, brokers, and real estate developers to identify development sites, buildings for sale and space for lease. He also worked with the city's Small Business Development Center to educate local start-ups and small businesses about the real estate market and their leasing options. Tom has also worked as an office and retail leasing broker in the Washington DC and Northern Virginia markets, and composed quarterly market reports in his research associate roles at Lincoln Property Company and CoStar Group.

Tom is in the process of getting his Master's in Real Estate degree from Georgetown University's School of Continuing Studies, where he is concentrating in real estate finance. Tom is the secretary and alumni liaison for the Student Advisory Board of Real Estate and was nominated to participate in the ULI Hines Student Case Competition. Tom received his undergraduate degree from Washington and Lee University, where he double majored in English and Religion.

KEY PROJECTS

- **URW Brandon Redevelopment Strategy**
Brandon, FL
- **URW Santa Anita redevelopment strategy**
Arcadia, CA
- **URW Valencia Redevelopment Strategy**
Valencia, CA
- **Montgomery County Retail Revitalization**
Montgomery County, MD
- **Hudson Square COVID-19 retail recovery strategy**
New York, NY
- **MetroWest Retail Analysis**
Fairfax, VA

Tom Colicchio

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EDUCATION

University of Pennsylvania, Philadelphia, PA

Master of City Planning, 2019

University of Maryland, College Park, MD

Bachelor of Science in
Agricultural Economics, 2017

Baiwei Zhang

Research Analyst

Baiwei is a Research Analyst in Streetsense's Research + Analysis studio. After growing up in Baotou, China, she moved to the US to earn a bachelor's in agricultural and resource economics at UMD. She recently graduated from UPenn with a master's in city planning. While she was in school, Baiwei was a summer intern at the China Academy of Urban Planning and Design and assisted in research and planning projects. She was also a graduate assistant for Public Realm Studio at UPenn, where she researched housing policies, planning, and renovation projects of urban villages in Shenzhen.

KEY PROJECTS

- Chino Airport Commercial Use Demand Study
Chino, CA
- Valencia Town Center Market Assessment
Valencia, CA
- Outlets at Lake Elsinore Commercial Market Assessment
Lake Elsinore, CA

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PROFESSIONAL ACCREDITATIONS

- American Institute of Certified Planners
- LEED Accredited Professional
- Congress for the New Urbanism - Accredited

MEMBERSHIPS

- American Planning Association
- Congress for the New Urbanism

EDUCATION + CREDENTIALS

**University of Miami,
Miami, FL;**
Bachelor of Architecture
1991

Colin Greene
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Colin Greene

CNU-A, LEED AP
AICP, Managing Director of Planning
July 2015 - Present

As Managing Director of Planning at Streetsense, Colin contributes design philosophy and placemaking strategy that combines his deeply-rooted, New Urbanist principles with his acute awareness of development reality — from market to site conditions. He has most recently shared this expertise on projects for private developers such as Brandywine, JBG SMITH, Hines, Toll Brothers, and Newland Communities. Recent public sector clients include Fairfax County, Virginia; the City of Fredericksburg, VA; and the Metropolitan Washington Airport Authority.

Colin's strength is working on assignments and for clients who are taking on projects that have no peers. His ability to see opportunities to improve communities and capture these improvements in physical place design has few rivals. Among our unique collection of team members at Streetsense, Colin is regarded as a pioneer in community-embracing planning strategy and design.

KEY PROJECTS

Schuykill Yards

Philadelphia, PA

- Placemaking Vision, Ground Plane Vision, Design Coordination, Wayfinding Strategy

Philadelphia Navy Yard Research Park

Philadelphia, PA

- Master Plan, Design Coordination, Placemaking Vision

Wellen Park

Venice, FL

- Master Plan (Town Center) Placemaking Vision, Public Space Design



EDUCATION + CREDENTIALS

University of San Francisco

Master Certificate,
Digital Marketing

Virginia Tech

BA Landscape Architecture

Tom Frank

Executive Director, Marketing

October 2016 – Present

As Executive Director of Marketing at Streetsense, Thomas works closely with the team to ensure that client programs have an effective marketing strategy integrated across all communications channels. Tom brings more than 20 years of experience in graphic design, multimedia, social media, public relations and digital marketing to the role, with a strength in consumer packaged goods, retail, destination marketing and community advocacy. Currently, Tom oversees global social media strategy for Logitech, Ultimate Ears, Jaybird and Co Star as well as brand and marketing for Cedar Realty, Elm Street Development, Freida Rothman and destinations such as Bothell, WA, Wauwatosa, WI, Kent County, MD and Bothell, WA. Prior to Streetsense, Tom has led as Principal and Creative Director for Project BIG fish, a DC-based brand and marketing firm, as well as Executive VP and Chief Creative Officer for kglobal, a DC-based public affairs firm.

KEY PROJECTS

- City of Bothell
Bothell, WA
- City of Wauwatosa
Wauwatosa, WI
- Kent County, DE
Dover, DE

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RCLCO

REAL ESTATE ADVISORS

Since 1967 RCLCO has been the “first call” for real estate developers, investors, the public sector, and non-real estate companies and organizations seeking strategic and tactical advice regarding property investment, planning, and development. RCLCO leverages quantitative analytics and a strategic planning framework to provide end-to-end business planning and implementation solutions at an entity, portfolio, or project level. With the insights and experience gained over a half-century and thousands of projects—touching over \$5B of real estate activity each year—RCLCO brings success to all product types across the United States and around the world.

RCLCO has expertise in five major areas: Strategic Planning & Litigation Support, Urban Real Estate, Community & Resort, Public Strategies, and Institutional Advisory Services.

Our multidisciplinary team combines real world experience with the analytical underpinnings of thousands of consulting engagements. We develop and implement strategic plans that strengthen our clients’ positions in a market or sector, add value to a property or portfolio, and mitigate price erosion.

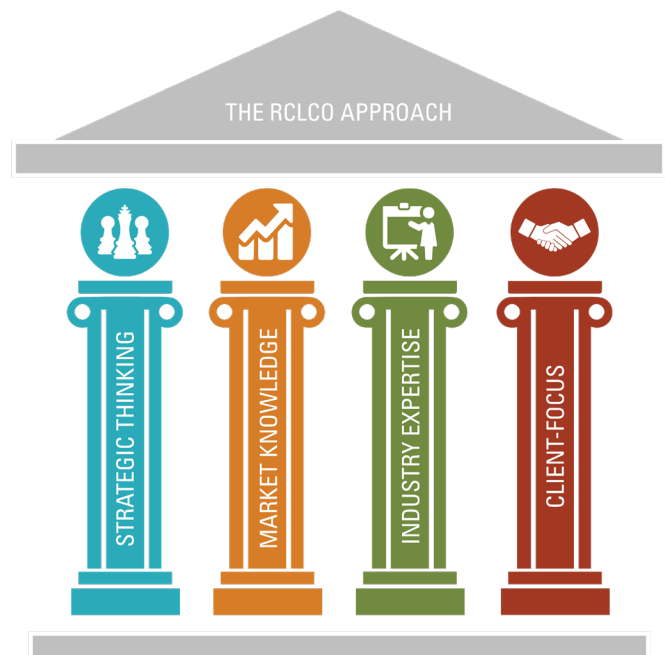
Since we first opened our doors, RCLCO has been governed by our core values. We believe that excellence, integrity, honesty, respect, exceeding expectations, and quality are great goals that all firms must possess. These goals and values shape the culture and define the character of our firm. They guide how we behave and make decisions. Our extensive network provides us with a unique and comprehensive outlook on the industry, not to mention unmatched access to the best minds in real estate.

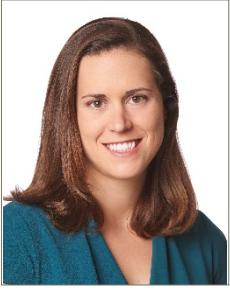
Our Clients

- » Developers
- » Home Builders
- » Financial Institutions
- » Asset Managers
- » Commercial Lenders
- » International Investors
- » Law Firms
- » Property Managers
- » Economic Development Agencies
- » Associations & Nonprofits
- » Planning & Architecture Firms
- » Trusts & Estates
- » Corporations
- » Academic Institutions
- » REITs
- » Towns, Cities, Counties, Regions, & States

Affiliations

- » Urban Land Institute
- » Pension Real Estate Association
- » International Economic Development Council
- » National Multifamily Housing Council
- » International Council of Shopping Centers
- » National Council of Real Estate Investment Fiduciaries
- » And many more!





Education

University of Pennsylvania; BA, Architecture

Affiliations

Urban Land Institute

Recent Speaking Engagements

Capitol Riverfront BID, Annual Meeting 25th Southern Living Inspired Communities Summit Annual Congress for the New Urbanism ULI Washington: The Suburban/Urban Exchange University of Maryland Partnership for Action Learning in Sustainability: Potential for Historic Ellicott City

ERIN TALKINGTON

MANAGING DIRECTOR & DIRECTOR OF CONSULTING

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Erin Talkington is a Managing Director and Director of Consulting based in RCLCO's Washington, DC office. Since joining the firm in 2010, Erin has engaged with a wide variety of clients in both the public and private sectors to provide market and economic analysis that guides development and planning decisions. Her experience includes highest and best use analysis for large mixed-use sites, downtown and corridor revitalization studies, and regional growth analysis. Applicable to projects of all types and scales, Erin's strength is her ability to quickly synthesize the key market opportunities and strategic positioning for a particular site and communicate that vision to project team members, clients, and community stakeholders. As the firm's Director of Consulting, she is responsible for the development and implementation of strategic initiatives in team member recruitment and retention of human capital.

In addition to client work, Erin has been integral in the continued development of RCLCO's MetroLogic methodology, which forecasts regional competitiveness for growth and development. The MetroLogic platform also integrates scenario modeling that measures the impact of proposed transportation investments on both the quantity and value of development in a local area.

Erin draws upon a broad background in planning and development. Prior to RCLCO, she gained project management experience for The Reinvestment Fund Development Partners and exposure to transportation planning at Kittelson & Associates. She holds a Bachelors in Architecture from the University of Pennsylvania. Erin is a member of the Urban Land Institute (ULI) in Washington, DC and the chair of the Young Leader's Group.



JAKE ROSS

VICE PRESIDENT

P: (240) 404-6811 | E: JROSS@RCLCO.COM | W: RCLCO.COM/JAKE-ROSS

Jake Ross is a Vice President based in Washington, DC. With a focus in Real Estate Economics, Jake helps clients in the public and private sectors identify market opportunities and guide strategic development decisions. He serves as a project manager on a wide variety of assignments, specializing in mixed-use and other urban development projects. His recent experience includes market feasibility studies and highest-and-best-use analyses for large infill sites, as well as regional growth analyses and fiscal impact studies for public sector entities.

Education

Cornell University

Affiliations

Urban Land
Institute

At RCLCO, Jake played an integral role in the development of the Neighborhood Atlas, a tool created in conjunction with the ULI Terwilliger Center for Housing to classify and analyze economic, demographic, and development trends in American neighborhoods. He also assists in methodology development to enhance the demand projections and segmentation analyses that RCLCO uses in its day-to-day work.

Prior to joining RCLCO in 2015, Jake attended Cornell University, where he graduated with a Bachelor of Science in Urban and Regional Studies and minors in Real Estate and Business. His coursework centered around Urban Planning, Real Estate Development, Public Policy, and Geographic Information Systems (GIS). While at Cornell, Jake was also a member of the Men's Heavyweight Rowing team.

Sample Project Experience:

- » H.J. RUSSELL & COMPANY; *Project Manager*: Strategic Market Analysis for 36 Acre Castleberry Hill Development Plan; Atlanta, Georgia
- » OLD TOWN COMPANIES; *Project Manager*: Market Analysis & Research for Discovery Park Village; West Lafayette, Indiana
- » EYA; *Project Manager*: Strategic Market Analysis for a Mixed-Use Development at the West Falls Church Metro; Falls Church, Virginia
- » KAUFMAN DEVELOPMENT; *Project Manager*: Strategic Market Analysis and Case Studies for Residential in Phase 2 of Title Town; Green Bay, Wisconsin
- » KIMCO; *Project Manager*: Rental Apartment Market Study at Pentagon Centre in Arlington, Virginia
- » BROOKFIELD RESIDENTIAL; *Project Manager*: Mixed-Use Residential and Commercial Market Analysis for the Tuttle Sites at the Miami Design District; Miami, Florida
- » MILL CREEK RESIDENTIAL; *Project Manager*: Rental Apartment Market Analysis and Strategic Development Recommendations for Modera Weston; Weston, Massachusetts
- » ULI TAMPA BAY; *Project Manager*: Confirming Letter for Housing Market Report Preparation for the Tampa Bay District Council; Tampa Bay, Florida
- » MERIDIAN GROUP; *Project Manager*: Rental Apartment Market Analysis; Tysons, Virginia
- » HOST HOTELS AND RESORT; *Project Manager*: Strategic Market Analysis for a Mixed-Use Redevelopment Project; Boston, Massachusetts

References

Our team of subject matter experts play an integral part in building relationships with clients and ensuring successful project outcomes.

Project Name	Team Members	Reference
1 — Montgomery County Market Analysis	Heather Arnold	Rick Liu Montgomery County Planning Department rick.liu@montgomeryplanning.org Direct: 301-650-5641
2 — Cambridge Retail Strategic Plan	Larisa Ortiz Nur Asri	Lisa Hemmerle Cambridge Community Development Department lhemmerle@cambridgema.gov Direct: 617.349.4616
3 — Downtown Memphis Market Study + Action Plan	Larisa Ortiz Nur Asri	Brett Roler Downtown Memphis Commission roler@downtownmemphis.com Direct: 617.349.4616
4 — Cedar Park Future Land Use Study	Jake Ross Erin Talkington	Christopher Copple City of Cedar Park christopher.copple@cedarparktexas.gov Direct: 512.401.5066

SECTION 4

Project Sheets

Cambridge Retail Strategic Plan

CLIENT

City of Cambridge

SCOPE OF WORK

In 2017, Streetsense was hired by the City of Cambridge, MA to conduct a District-Level Analysis and Retail Strategy Plan for each of the city's eight commercial districts. The goal of the plan was to develop a strategy of best practice policies and programs to support and enhance the ground level active use and retail environment in Cambridge. This included:

- Presenting an overall state of the city's current retail while identifying unmet retail needs and how to meet them (e.g. new policies, public-private partnerships, programming, transportation, and building infrastructure).
- Identifying short and long-term goals forming the basis for the city's new retail retention and recruiting strategy.
- Highlighting the city's strengths, weaknesses, opportunities and threats relating to retail retention/recruitment, based on regional current and expected conditions.
- Identifying key actions and best practices the city might consider to enhance its marketability and visibility to retailers and other ground floor businesses.

SERVICES

Research + Analysis

Retail Market Demand Analysis

Retail Merchandising Strategies

Branding + Marketing

**Work completed as Larisa Ortiz Associates prior to acquisition in May 2019*



Downtown Memphis Retail Market Study

CLIENT

Downtown Memphis Commission

SCOPE OF WORK

Streetsense was engaged by the Downtown Memphis Commission (DMC) to conduct a retail market assessment of Downtown Memphis and to formulate a comprehensive action plan that prioritizes quick wins, respects and celebrates the role of Memphis in the Civil Rights Movement and its rich history of music, and supports the equitable growth of downtown as a retail and tourism destination. Robust stakeholder feedback and findings from the physical site assessments and market analysis informed recommendations for each of five downtown nodes including South Main - home of the historic Lorraine Motel, National Civil Rights Museum, and Blues Hall of Fame.

SERVICES

Research + Analysis

RETAIL LEAK BY CATEGORY

DOWNTOWN MEMPHIS

Retail Leakage Categories	Retail Leakage	Potential Retail SF (by capture rate)		
		100%	60%	40%
Electronics + Appliance Stores	\$6,750,068	5,945	3,567	2,378
Food + Beverage Stores	\$4,383,149	7,772	4,663	3,109
General Merchandise Stores	\$47,081,478	135,117	81,070	54,047
Total Potential SF:		148,834	89,300	59,534

INSIGHT

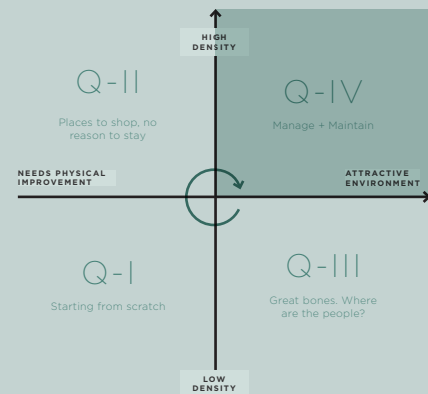
There is some potential to grow downtown retail offerings, not including future spending potential by new residents.

DOWNTOWN LIFE CYCLE

Two significant determinants:

X Axis: Density of population and business
Y Axis: Physical conditions of the downtown

- Quadrant I:** Redevelopment of public and private realm/property and build density
- Quadrant II:** Redevelopment of public realm + building density of offerings/anchors
- Quadrant III:** Build density and improve access/visibility
- Quadrant IV:** Promote business/events



RETAIL RECOMMENDATIONS

Downtown Memphis Retail Action Plan									
November 2018									
Guiding Principle	Strategy	IMPLEMENTATION				IMPACT AREAS			
		Stage	Time	Cost	Potential Partners	Major Retailer/Anchor	South Main	Third Floor	Midtown
Track challenges and opportunities for downtown living	Track challenges and opportunities for downtown living	Ongoing	1-2 years	Low	Neighborhood businesses	✓	✓	✓	✓
Encourage growth of downtown residential population	Prioritize development incentives for new downtown residents	For future study	1-2 years	Low	✓	✓	✓	✓	✓
Support mixed-use development in the Third Floor	Support mixed-use development in the Third Floor	For future study	1-2 years	Low	Large employers	✓	✓	✓	✓
Build a strong cultural core of shops and activities within existing streets	Consider dedicating DMC staff time to curate retail direction and monitor	New	1-2 years	Low	Memphis National Center	✓	✓	✓	✓
Engage/involve in Main Floor program to South Main	Engage/involve in Main Floor program to South Main	Ongoing	1-2 years	Low	Property owners	✓	✓	✓	✓
Establish a retail board	Establish a retail board	New	1-2 years	Low	Property owners, neighborhood business	✓	✓	✓	✓
Prioritize incentives for creative office tenants on South Main	Prioritize incentives for creative office tenants on South Main	Ongoing	1-2 years	Low	✓	✓	✓	✓	✓
Launch a downtown business plan competition	Launch a downtown business plan competition	New	1-2 years	Low	Property owners, local business, neighborhood business, creative	✓	✓	✓	✓
Use existing PG&E infrastructure and/or new technology tools to support an active greenery strategy	Use existing PG&E infrastructure and/or new technology tools to support an active greenery strategy	Ongoing	1-2 years	Low	✓	✓	✓	✓	✓
Enhance marketing of available downtown retail spaces	Enhance marketing of available downtown retail spaces	New	1-2 years	Low	Landowners, developers	✓	✓	✓	✓
Prioritize incentives for creative office and retail/manufacturing tenants	Prioritize incentives for creative office and retail/manufacturing tenants	New	1-2 years	Low	Property owners, local business	✓	✓	✓	✓
Support marketing of downtown retail spaces	Support marketing of downtown retail spaces	Ongoing	1-2 years	Low	Business, Creative, Property owners, local business	✓	✓	✓	✓



City of Fredericksburg Small Area Plans

CLIENT

City of Fredericksburg, VA

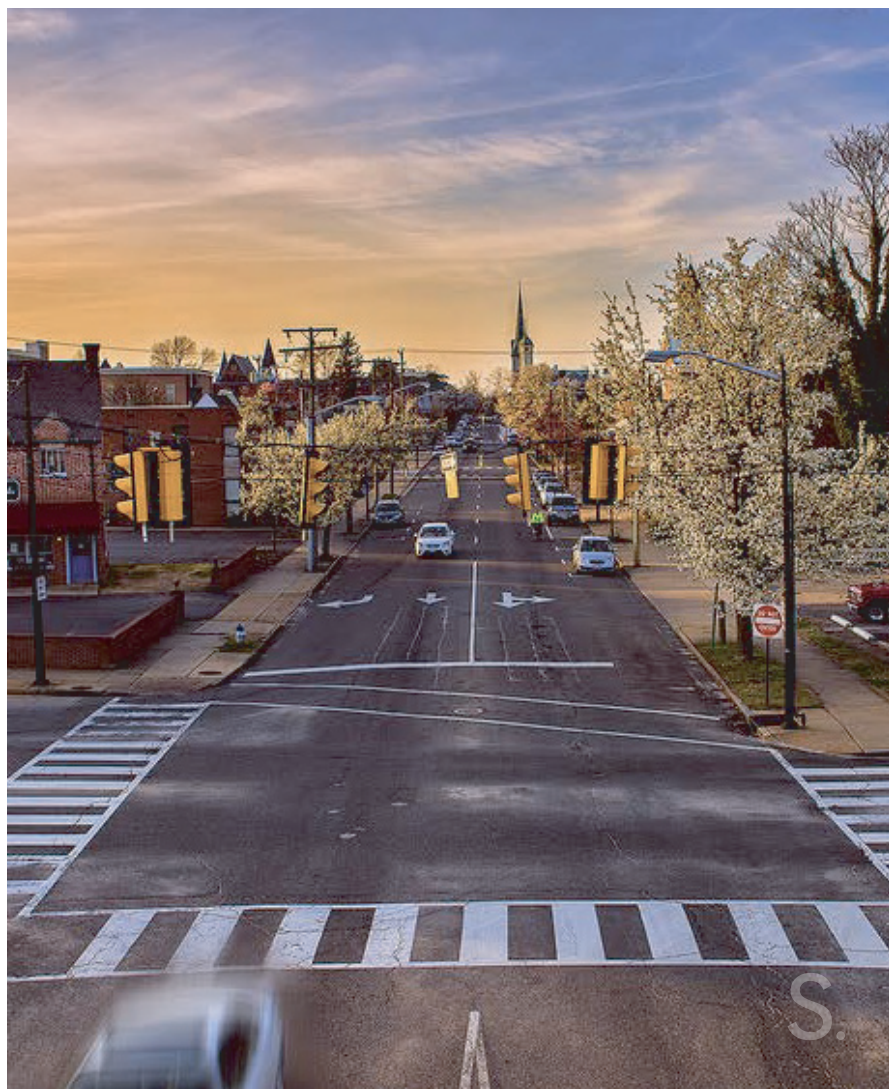
SCOPE OF WORK

Streetsense analyzed twelve neighborhood areas to determine the amount of retail square footage that is supportable and of which type of retail.

After the market analysis, the planning team worked with the City of Fredericksburg to develop a series of planning maps that present existing conditions for land use, access and mobility, development patterns, and site features. The market analyses determined the appropriate amount of retail development for the two areas within the context of the City of Fredericksburg greater market. The planning efforts are ongoing, as the Streetsense team continues to develop site plans that inform the City's understanding of appropriate development schemes into the future.

SERVICES

- Highest and Best Use Market Analysis
- Planning
- Stakeholder Engagement



Montgomery County 3R Initiative

CLIENT PROFILE

The Montgomery County Economic Development Corporation (MCEDC) announced the creation of a public-private partnership known as the Montgomery County 3R Initiative (Reopen Relaunch and Reimagine) to support the reopening and recovery of a pilot group of commercial corridors and local restaurants and retail storefronts.

SCOPE OF WORK

As part of the 3R Initiative's technical assistance, Streetsense supported a pilot group of retail corridors and establishments with a variety of resources including broad recovery recommendations, branding and marketing-driven strategies, and tactical interventions, as the local restaurant and retail industries navigate the next year of operations and position themselves for post-pandemic growth. In addition to leveraging existing marketing initiatives that showcase local makers, Streetsense established an online platform by which consumers can shop safely and specifically to support local business. As part of the initiative, Streetsense will continue to work with selected communities using a wide variety of relaunch tools such as redesigning retail space, advising on new business models including e-commerce, and creating a Montgomery County Retail Recovery Guide.

SERVICES

- Architecture
- Branding
- Marketing
- Real Estate Strategy
- Research + Insights



Vibrant Streets Toolkit

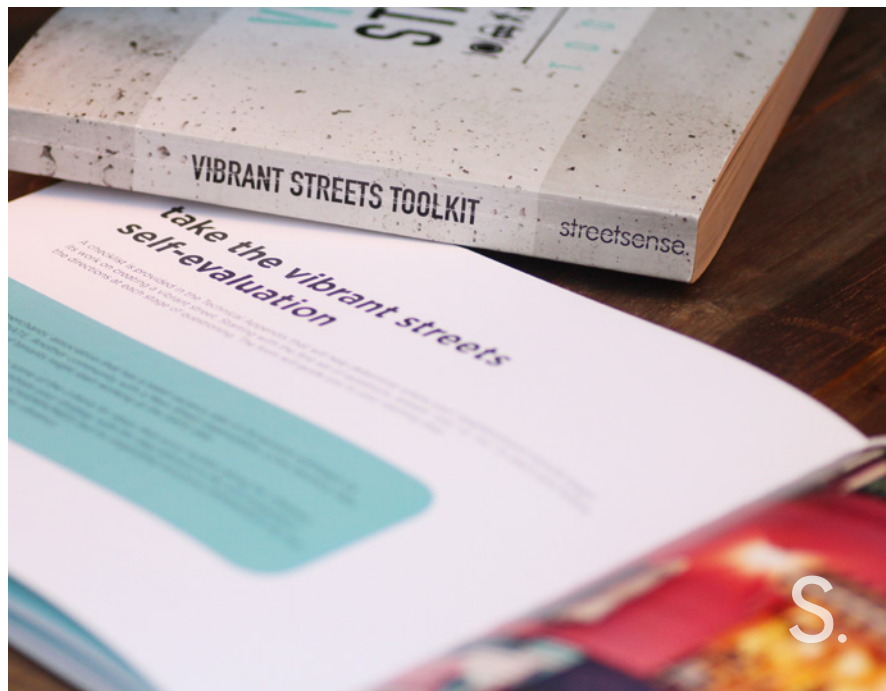
CLIENT

DC Office of Planning

SCOPE OF WORK

We were chosen to spearhead a citywide study to identify the conditions most important in creating thriving retail districts. A local engagement gave way to a nationwide strategy, and the rest is history.

The result was a masterful, macro-level roadmap for municipal agencies to guide neighborhood development, spur job growth, and revive local economies. The toolkit was downloaded by over 500 communities with 20 of those communities inviting Streetsense to facilitate Vibrant Streets workshops.





The Challenge

The City of Cedar Park is evaluating its future land use plan, with a focus on a plan that is not only responsive to near- and long-term market opportunities, but also promotes vitality, a sense of community, economic stability and growth (attracting high-quality employers), and sustainable value (positive net fiscal impact). The City engaged RCLCO to study the market and real estate conditions in the region and ensure the future land use plan is consistent with near- and long-term market opportunities. Additionally, the City has identified six “planning areas” that are targeted for land uses or project concepts that create and sustain long-term value such as entertainment and tourism destinations, cultural attractions, major employment nodes, corporate campus, four-year institutions, walkable mixed-use projects, or other high-quality development types.

Solution

RCLCO’s analysis found that the City had the residential base and growth to support and absorb approximately 500 acres of land for commercial development through the next two decades. RCLCO advised the City to protect vacant land located along regional corridors for commercial and mixed use development, as residential land uses are important drivers of commercial development, particularly walkable, mixed-use developments which further enhance commercial demand potential.

RCLCO developed a fiscal impact calculator for the purposes of comparing net fiscal and economic impacts derived from the development of commercial and residential land uses. This model examined all potential revenues generated and costs incurred by the City as a result of market-driven development. In addition, from the six “planning areas”, we were able to identify which would offer the strongest opportunity to capture commercial demand and create mixed-use developments.

Impact

This analysis not only helped inform future land use planning, but was also utilized to help prioritize public expenditures for economic development efforts and to understand how to creatively catalyze the market.

Project Type:

Code/Zoning Review
Fiscal Impact Analysis
Market Analysis

Condition of Land:

Greenfield
Mixed/Multi-Use

Product Type:

Hotel
Industrial/R&D
Office
Retail

Client: City of Cedar Park

Project Reference:

Christopher Copple, Director
of Development Services
City of Cedar Park
450 Cypress Creek Road
Cedar Park, TX 8613
P: (512) 401-5066
E: christopher.copple@cedarparktexas.gov



The Challenge

Yonkers, New York's third-largest city, despite lying adjacent to New York City and being located proximate to high wealth areas of Westchester County, NY, has a downtown that has faced decades of decline. Despite the addition of several thousand new housing units in the downtown during the late 1990s and early 2000s, and significant infrastructure investment, the much anticipated retail and street life renaissance had failed to materialize. Meanwhile, City leaders were considering major investments in a downtown retail and entertainment project, and wanted to know whether it would revitalize the downtown—and if not, what would?

Solution

RCLCO's initial market analysis and economic assessment of the downtown district indicated several unique conditions. The City was not leveraging its robust industrial base to create opportunities for existing businesses to occupy and grow the downtown daytime employment base. In fact, RCLCO's analysis confirmed that Yonkers had the elements to become one of America's next industrial downtowns—a place where productive uses in high technology industries could co-locate with traditional office, retail and residential uses. Meanwhile, the lack of a significant institutional anchor was suppressing demand for urban entertainment that could transform the downtown into a lifestyle destination.

Impact

RCLCO worked with City leadership to recast Yonkers' economic development strategy from one that was based solely on incentivizing real estate projects to one that engaged in targeted outreach, recruitment, and placement of key companies into and around the downtown. Critically, we emphasized a vision of a future Yonkers that continues to be grounded in industry—but the types of industry that will drive the next 100 years of growth. We also worked with Urban Design Associates to construct market-driven re-zoning recommendations for the Downtown to enhance the climate for private sector investment in existing buildings and new development sites. RCLCO's next step of work is to outline a proactive outreach strategy for the downtown, including recommendations as to how to apply a market segmentation framework to diversify the character of development that is attracted to the city and to outline potential commercial tenants and institutional anchors that could be attracted to downtown Yonkers.

Project Type:

Downtown Revitalization
Economic Development
Implementation Strategy
Market Analysis
Target Industry Analysis

Condition of Land:

Mixed/Multi-Use
Revitalization

Product Type:

Affordable/Workforce
Housing/LIHTC
For-Rent Apartments
For-Sale Attached
Condominiums
Industrial

Client: City of Yonkers

Project Reference:

Tom Collich
Purchasing Director
City of Yonkers
40 South Broadway
Suite 102
Yonkers, NY 10701
P: (914) 377-6035
E: thomas.collich@yonkersny.gov

SECTION 5

Appendix

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

advantageous to the Town of Vienna can be negotiated at a price considered fair and reasonable, the Town Council shall be advised and make the award to that offeror. Otherwise, negotiations with the offeror ranked first shall be formally terminated and negotiations conducted with the offeror ranked second, and so on until such a contract can be negotiated at a fair and reasonable price.

Should the Evaluation Committee determine in writing that only one (1) offeror is fully qualified, or that one (1) offeror is clearly more highly qualified and suitable than the others under consideration, a contract may be negotiated and awarded to that Offeror.

The award will be made to the responsible Offeror whose proposal, conforming to the solicitation, is the most advantageous and represents the best value to the Town of Vienna, costs and other factors considered.

The Town, as a municipal corporation of the Commonwealth of Virginia, is obligated and bound by the terms of this Agreement only to the extent that funds are lawfully appropriated therefore and are allocated and available to pay its obligations hereunder. In the event that and at such time as funds have not been appropriated or are not allocated and available to pay the Town's obligations under this Agreement, then the Town shall not be liable for any obligation to pay for the services referred to in this Agreement.

It is expressly agreed and understood that the selected firm is in all respects an independent Contractor as to work and is in no respect any agent, servant, or employee of the Town. The contract specifies the work to be done by the firm, but the method to be employed to accomplish the work shall be the responsibility of the firm.

SECTION 8. CONTRACT TERM

The term of this contract shall be from the date of award until the project is completed.

SECTION 9. SPECIAL TERMS AND CONDITIONS

Precedence of Terms: In the event that there is a conflict between the General Terms and Conditions and any Special Terms and Conditions used in this section, the Special Terms and Conditions shall apply.

- A. Mandatory Use of Town Forms and Terms and Conditions: Failure to submit a proposal accompanied by the signed and dated Cover Sheet provided shall be a cause for rejection of the proposal. Return of the complete document is required. Modification of or additions to any portion of the solicitation may be cause for rejection of the proposal; however, the Town of Vienna reserves the right to decide, on a case-by-case basis, in its sole discretion, whether or not such a proposal should be considered as non-responsive.

Offerors are reminded that changes to the RFP, in the form of addenda, are often issued between the issue date and within three business (3) days before the closing of the RFP. Offerors are solely responsible for checking the Town website to ensure that they have the most current information regarding the RFP.

All addenda must be signed and submitted with your bid.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

- B. Ownership of Material: Ownership of all data, materials and documentation originated and prepared for the Town of Vienna pursuant to the RFP shall belong exclusively to the Town and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets and proprietary information submitted by an offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protections of this section prior to or upon submission of the data or other materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary.
- C. Default: In case of failure to deliver services in accordance with the contract terms and conditions, the Town of Vienna, after due oral or written notice, may procure them from other sources and hold the Consultant responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Town of Vienna may have.
- D. Obligation of Offeror: By submitting a proposal, the offeror covenants and agrees that he has satisfied himself, from his own investigation of the conditions to be met, that he fully understands his obligation and that he will not make any claim for, or have right to cancellation or relief from the contract because of any misunderstanding or lack of information.
- E. Withdrawal/Modification of Proposals: Proposals may be withdrawn or modified by written notice received from Offerors prior to the time fixed for proposal receipt.
- F. Receipt and Opening of Proposals: In the case of proposals received in response to a Request for Proposals, public openings are not required; however, if a public opening is held, only the names of the Offerors are read aloud.
- G. Qualifications of Offerors: The Town of Vienna may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the work, and the offeror shall furnish to the Town of Vienna all such information and data for this purpose as may be requested. The Town of Vienna reserves the right to inspect the Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. The Town of Vienna further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Town that such offeror is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.
- H. Debarment Status: By submitting their proposals, all Offerors certify that they are not currently debarred from submitting proposals on contracts by any agency of the Commonwealth of Virginia, nor are they an agent of any person or entity that is currently debarred from submitting proposals on contracts by any agency of the Commonwealth of Virginia.
- I. Cancellation of Contract: The Town of Vienna reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty upon ten (10) days written notice to the consultant. Any contract cancellation notice shall not relieve the consultant of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

- J. Rights of the Town of Vienna: The Town of Vienna further reserves the right to request information relative to experience, reference and/or financial status of a firm.
- K. Conflict of Interest: The Offeror certifies that to the best of its knowledge no employee of the Owner nor any member thereof, nor any public agency or official affected by the proposal, has a pecuniary interest in the business of the Offeror, and that no person associated with the Offeror has any interest that would conflict in any manner with the performance of the proposal.
- L. Insurance: By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the insurance coverage specified on the Insurance Checklist within ten (10) days of notification of award. Additionally, the Offeror certifies that it will maintain all required insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract the Owner reserves the right to require the Firm to furnish the certificates of insurance for coverage required to the Procurement Division.

Insurance Coverages and Limits Required:

- a. Worker's Compensation - Statutory requirements and benefits.
- b. Employers Liability - \$100,000.00
- c. General Liability - \$500,000.00 combined single limit. The Town of Vienna is to be named as an additional insured with respect to the services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
- d. Automobile Liability - \$500,000.00
- e. Professional Liability/Errors and Omissions Coverage - Proof of professional liability coverage must accompany the Consultant's written proposal.

Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, the Town reserves the right to require the consultant to furnish certificates of insurance for the coverage required.

The Town of Vienna, Virginia is to be named as an additional insured and this is to be so noted on Certificate of Insurance. The policy shall be delivered to the Town of Vienna PRIOR to the commencement of any work.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

A thirty (30) day written notice of cancellation or non-renewal shall be furnished by certified mail to the purchasing office at the address indicated on the solicitation.

- M. Ownership of documents: Any reports, studies, photographs, negatives or other documents prepared by the Offeror in the performance of its obligations under this contract shall be the exclusive property of the Owner, and all such materials shall be remitted, without restriction, to the Owner by the Offeror upon completion, termination or cancellation of the contract. Offeror shall not use, willingly allow, or cause to have such materials used for any purpose other than performance of the Offeror's obligations under this contract without the prior written consent of the Owner.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

SECTION 10. GENERAL TERMS AND CONDITIONS

VENDOR: THE GENERAL TERMS AND CONDITIONS WHICH FOLLOW APPLY TO ALL PURCHASES AND BECOME A DEFINITE PART OF EACH FORMAL INVITATION FOR BID, REQUEST FOR PROPOSALS, PURCHASE ORDER AND/OR OTHER AWARD ISSUED BY THE TOWN OF VIENNA, VIRGINIA, UNLESS OTHERWISE SPECIFIED IN THE SOLICITATION DOCUMENTS. BIDDERS/OFFERORS OR THEIR AUTHORIZED REPRESENTATIVES ARE EXPECTED TO FULLY INFORM THEMSELVES AS TO THE CONDITIONS, REQUIREMENTS, AND SPECIFICATIONS BEFORE SUBMITTING BIDS/PROPOSALS; FAILURE TO DO SO WILL BE AT THE BIDDERS/OFFERORS' OWN RISK AND HE CANNOT SECURE RELIEF ON THE PLEA OF ERROR.

SUBJECT TO STATE, COUNTY AND LOCAL LAWS AND ALL RULES, REGULATIONS AND LIMITATIONS IMPOSED BY LEGISLATION OF THE FEDERAL GOVERNMENT, BIDS/PROPOSALS ON ALL SOLICITATIONS ISSUED BY THE PURCHASING OFFICE WILL BIND BIDDERS/OFFERORS TO APPLICABLE CONDITIONS AND REQUIREMENTS HEREIN SET FORTH UNLESS OTHERWISE SPECIFIED IN THE SOLICITATION.

1. **CLARIFICATION OF TERMS:** If any prospective bidder/offeree has questions about the specifications or other solicitation documents, the prospective bidder/offeree should contact the Purchasing Agent or the person whose name appears on the face of solicitation NO LATER THAN SEVEN (7) WORKING DAYS BEFORE opening/closing date. Any revisions to the solicitation will be made only by addendum issued by the Purchasing Agent.
2. **PREPARATION & SUBMISSION:** In order to be considered for selection, the bidder/offeree must submit a complete response to the Invitation For Bid/Request For Proposals. One (1) original and one (1) copy of each bid/proposal must be submitted on the Town of Vienna Bid/Proposal Forms provided. The bid/proposal shall be signed by an authorized representative of the bidders'/offerors' firm and delivered to the proper location by the time and date specified on the cover page.
3. **ENVELOPE IDENTIFICATION:** The signed bids must be returned in a sealed envelope and identified as follows: "SEALED BID", show the IFB number, IFB subject, opening time, opening date, and bidder's name and address. In the case of proposals, the signed proposal cover page and proposal must be returned in a sealed envelope, marked clearly on the outside "SEALED COMPETITIVE NEGOTIATION", show the RFP number, RFP subject, closing time, closing date, and offeror's name and address.

If a bid/proposal is mailed in an envelope, not identified as specified, the bidder/offeree takes the risk that the envelope may be inadvertently opened and the information compromised which may cause the bid/proposal to be disqualified. The Town reserves the right to declare such a bid/proposal as non-responsive. Bids/proposals may be hand delivered to the designated location.

4. **LATE BIDS/PROPOSALS:** LATE bids/proposals will be returned to bidder/offeree UNOPENED, if the IFB/RFP number and return address is shown on the envelope.
5. **QUOTATIONS TO BE F.O.B. DESTINATION:** Quote F.O.B. DESTINATION for all competitive sealed bids. If otherwise, show exact cost to deliver.
6. **PRICING ERRORS:** In case of an error in price extension, the firm fixed unit price shall govern.
7. **BID/PROPOSAL ACCEPTANCE PERIOD:** Bids shall be binding upon the bidder for sixty (60) days following the bid opening date. Proposals shall be binding upon the offeror for ninety (90) days following the proposal due date. Any bid/proposal on which the bidder/offeree shortens the acceptance period may be rejected.
8. **CORRECTION OR WITHDRAWAL OF BIDS AND CANCELLATION OF AWARDS UNDER COMPETITIVE SEALED BIDDING:** Correction or withdrawal of inadvertently erroneous bids before or after award, or cancellation of awards or contracts based on such bid mistakes, shall be permitted. After bid opening, no changes in bid prices or other provisions of bids prejudicial to the interest of the Town or fair competition shall be permitted. Except as otherwise provided by regulation, all decisions to permit the correction or withdrawal of bids, or to cancel awards or contracts based on bid mistakes, shall be supported by a written determination made by the Purchasing Agent. No bid may be withdrawn when the result would be to award the contract on another bid of the same bidder or of another bidder in which the ownership of the withdrawing bidder is more than five percent (5%). If a bid is withdrawn, the lowest remaining bid shall be deemed to be the low bid. If the Purchasing Agent, the Using Department, or a designee of such, denies the withdrawal of a bid, he shall notify the bidder in writing stating his decision.
9. **TAX EXEMPTION:** The Town of Vienna is exempt from State Sales Tax and Federal Excise Tax. The Town's Federal Tax ID Number is 54-6001654. DO NOT INCLUDE TAX IN BID. Tax Exemption Certificate furnished by the Town of Vienna on request.
10. **USE OF BRAND NAME OR EQUAL:** Unless otherwise provided in the solicitation, the name of a certain brand, make or manufacturer does not restrict bidders/offerees to the specific brand, make or manufacturer named, but conveys the general style, type, character, and quality of the article desired. Any article which the Town of Vienna, in its sole discretion, determines to be equal to that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted. The bidder/offeree is responsible to clearly and specifically indicate the product being offered and to provide sufficient descriptive literature, catalogs and technical details to enable the Town of Vienna to determine if the product offered meets the requirements of the solicitation. This is required even if offering the exact brand, make or manufacturer specified. Normally in competitive sealed bidding only the information furnished with the bid will be considered in the evaluation. Failure to furnish adequate data for evaluation purposes may result in declaring a bid non-responsive. Unless the bidder/offeree clearly indicates in its bid/proposal that the product offered is an "EQUAL" product, such bid/proposal will be considered to offer the brand name product referenced in the solicitation.
11. **SAMPLES:** Samples, if required, must be furnished free of expense to the Town of Vienna on or before date specified; if not destroyed in examination, they will be returned to bidder, if requested, at his expense. Each sample must be marked with the bidder's name and address, Town's request number and opening date. DO NOT ENCLOSE IN OR ATTACH BID TO SAMPLE.
12. **DELIVERY:** Bids must show number of days required to place material in using agency's receiving area under normal conditions. Proposal must show the number of days required to provide the services/reports as specified.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

Failure to state delivery time obligates bidder/offeror to complete delivery in fourteen (14) calendar days or as specified. A five (5) day difference in delivery promise may break a tie bid. An unrealistically short or long delivery promise may cause a bid/offer to be disregarded. Consistent failure to meet delivery promise without valid reason may cause removal from bid list. Delivery shall be made during normal working hours, 8:00 am to 4:30 pm Monday through Friday, unless prior approval for another time period has been obtained from Consignee.

13. **DEFAULT:** In case of failure to deliver goods/services in accordance with the contractual terms and conditions, the Town of Vienna, Virginia, after due oral or written notice, may procure them from other sources and hold the defaulting Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Town of Vienna may have.
14. **CONDITION OF ITEMS:** All items bid/proposed shall be new and in first class condition, including containers suitable for shipments and storage, unless otherwise indicated in bid invitation/proposal request. Verbal agreements to the contrary will not be recognized.
15. **SUBSTITUTIONS:** No substitutions or cancellations permitted without prior written approval by the Purchasing Agent.
16. **RIGHTS OF THE TOWN OF VIENNA:** The Town reserves the right to accept or reject all or any part of bids/proposals, waive minor technicalities/informalities and award the contract to the lowest responsive and responsible bidder or most qualified and best suited offeror to best serve the interest of the Town.
17. **ANTI-TRUST:** By entering into a contract, the bidder/offeror conveys, sells, assigns, and transfers to the Town of Vienna all rights, title and interest in and to all causes of the action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Town of Vienna under said contract. Consistent and continued tie bidding could cause rejection of bids by the Purchasing Agent and/or investigation for Anti-Trust violations.
18. **INDEMNIFICATION:** The Contractor agrees to indemnify, defend and hold harmless the Town of Vienna, Virginia, its officers, agents, and employees from any claim, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor or any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using department or to failure of the using department to use the materials, goods or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered. The vendor agrees to protect the Town from claims involving infringement of patent or copyrights.
19. **TIE BIDS:** If there is a tie for low bid and all other considerations are equal, and if the public interest will not permit the delay of re-advertising for bids, the award shall be determined by drawing lots in public.
20. **PROHIBITION AS SUBCONTRACTORS UNDER COMPETITIVE SEALED BIDDING:** No bidder who is permitted to withdraw a bid shall, for compensation, supply any material or labor to or perform any subcontract or other work agreement for the person or firm to whom the contract is awarded or otherwise benefit, directly or indirectly, from the performance of the project for which the withdrawn bid was submitted.
21. **ASSIGNMENT OF CONTRACT:** A contract shall not be assignable by the Contractor, in whole or in part, without the prior written consent of the Town of Vienna, Virginia.
22. **CONTRACT DOCUMENTS:** The contract entered into by the parties shall consist of the Invitation For Bid/Request For Proposal, the signed bid/proposal submitted by the Contractor, the Town of Vienna's standard Purchase Order, the Mandatory/Special Specifications, Terms and Conditions, and the General Terms and Conditions, all of which shall be referred to collectively as the Contract Documents.

If the contractor has a standard contract form, this form shall be submitted with the bid/proposal submittal for the Town's review of its terms and conditions.

23. **LICENSE REQUIREMENT:** All firms doing business in the Town of Vienna are required to be organized or authorized to transact business in the Commonwealth of Virginia or include in its bid or proposal a statement describing why the bidder or offeror is not required to be so authorized. Additionally all firms doing business in the Town of Vienna are required to be licensed in accordance with the Town's "Business, Professional and Occupational Licensing (BPOL) Tax" Ordinance. Wholesale and retail merchants without a business location in the Town are exempt from this requirement. Questions concerning the BPOL Tax should be directed to the Finance Department, Business License Office, Telephone number (703) 255-6321. The BPOL License number must be indicated on the submitted bid form.
24. **AWARD:** The contract shall be awarded to the lowest responsive and responsible bidder or the most qualified and best suited offeror.

The Town Council will award all contracts in the amount of thirty thousand dollars (\$30,000.00) or more.

The Purchasing Agent will award all contracts less than thirty-thousand dollars (\$30,000.00).

The Purchasing Agent shall sign all contract documents, with the exception of "Construction" contracts, and issue a purchase order to the successful bidder/offeror.
25. **METHOD OF PAYMENT:** Upon satisfactory delivery of the merchandise and/or satisfactory completion of the services, all invoices and statements shall reference the purchase order number and be submitted to:

Town of Vienna
ATTN: ACCOUNTS PAYABLE
127 Center St., S.
Vienna, VA 22180.

The prices and payments shall be full compensation for the labor, tools, equipment, transportation and all other incidentals necessary to complete the specified terms and conditions.

RFP 21-01 MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY

26. **ANTI-DISCRIMINATION:** By submitting their bids/proposals all bidders/offers certify to the Town of Vienna that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, where applicable, and Section 2.2-4311 of the Virginia Public Procurement Act which provides:

In every contract over \$10,000.00 the provisions in A and B below apply:

- a. During the performance of this contract, the contractor agrees as follows:

The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin except where religion, sex or national origin is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor, is an equal opportunity employer.

Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

- b. The Contractor will include the provisions of the foregoing paragraphs in every subcontract or purchase order of over \$10,000.00, so that the provisions will be binding upon each subcontractor or vendor.

27. **ETHICS IN PUBLIC CONTRACTING:** The provisions contained in Sections 2.2-4367 through 2.2-4377 of the Virginia Public Procurement Act as set forth in the Code of Virginia (1950), as amended, shall be applicable to all contracts solicited or entered into by the Town of Vienna. A copy of these provisions may be obtained from the Purchasing Agent upon written request.

By submitting their bids/proposals, all bidders/offers certify that their bids/proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other bidder/offeror, supplier, manufacturer or subcontractor in connection with their bid/proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised unless consideration of substantially equal or greater value was exchanged.

28. **CRIMINAL SANCTIONS:** The provisions referenced in Item 27 supplement, but do not supersede, other provisions of law including, but not limited to, the State and Local Government Conflict of Interests Act (§§ 2.2-3100 et seq.), the Virginia Governmental Frauds Act (§§ 18.2-498.1 et seq.), and Articles 2 (§§ 18.2-438 et seq.) and 3 (§§ 18.2-446 et seq.) of Chapter 10 of Title 18.2. The provisions apply notwithstanding the fact that the conduct described may not constitute a violation of the State and Local Government Conflict of Interests Act.
29. **APPLICABLE LAW AND COURTS:** Any contract resulting from this solicitation shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
30. **LABELING OF HAZARDOUS SUBSTANCES:** If the items or products requested by this solicitation are "Hazardous Substances" as defined by 10.1-1400 of the Code of Virginia (1950), as amended, 42 U.S.C. § 11001 et seq., or 42 U.S.C. § 9601 et seq., then the bidder/offeror, by submitting his bid/proposal, certifies and warrants that the items or products to be delivered under this contract shall be properly labeled as required by the foregoing sections and that by delivering the items or products that the bidder/offer does not violate any of the prohibitions of Sec. 10.1-1400 et seq., or the Code of Virginia or Title 15 U.S.C. Sec. 1263.
31. **MATERIAL SAFETY DATA SHEETS:** Material Safety Data Sheets (MSDS) and descriptive literature shall be provided with the bid/proposal or delivered materials for each chemical and/or compound offered. Failure of the bidder/offeror to submit such data sheets may be cause for declaring the bid/proposal as non-responsive.
32. **DEBARMENT STATUS:** By submitting their bids, Bidders certify that they are not currently debarred by the Commonwealth of Virginia or any Political Subdivision from submitting bids on contracts for the type of services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
33. **COOPERATIVE PROCUREMENT:** As authorized in Section 2.2-4304 of the Code of Virginia this procurement is being conducted on behalf of and may be used by public bodies, agencies, institutions and localities of the several states, territories of the United States, and the District of Columbia with the consent of the Contractor.

PROPRIETARY INFORMATION:

Ownership of all data, materials, and documentation originated and prepared for the Owner pursuant to the REQUEST FOR PROPOSAL shall belong exclusively to the Owner and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act, however, the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information.

NOTICE OF PROPRIETARY INFORMATION

Section Title	Page Number	Reason(s) for Withholding from Disclosure

Confidentiality References Protection in Accordance with the Code of Virginia, Section 2.2-4342F**NOTICE OF PROPRIETARY INFORMATION (CONTINUED):**

INSTRUCTIONS: Identify the data or other materials to be protected and state the reasons by using the codes listed below. Indicate the specific words, figures, or paragraphs that constitute trade secrets or proprietary materials.

A- This page contains information relating to "trade secrets", and "proprietary information" including processes. Operations, style of work, or apparatus, identify confidential statistical data, amount or source of any income... of any person (or) partnership. "See Virginia Public Procurement Act, Section 2.2-4342F. Unauthorized disclosure of such information would violate the Trade Secrets Act 18 U.S.C. 1905.

B- This page contains proprietary information including confidential, commercial or financial information which was provided to the Government on a voluntary basis and is of the type that would not customarily be released to the public. See Virginia Public Procurement Act, Section 2.2-4342F; 5 U.S.C. 552 (b)(4); 12 C.F.R. 309.5(c)(4).

C- This page contains proprietary information including confidential, commercial or financial information. This disclosure of such information would cause substantial harm to competitive position and impair the Government's ability to obtain necessary information from contractors in the future. 5 U.S.C. See Virginia Public Procurement Act, Section 2.2-4342F; 552 (b)(4); 12 C. F. R 309.5(c)(4).

PROOF OF AUTHORITY TO TRANSACT BUSINESS IN VIRGINIA

THIS FORM MUST BE SUBMITTED WITH YOUR PROPOSAL/BID. FAILURE TO INCLUDE THIS FORM MAY
RESULT IN REJECTION OF YOUR PROPOSAL/BID

Pursuant to Virginia Code §2.2-4311.2, an Offeror/Bidder organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 of the Code of Virginia shall include in its proposal/bid the identification number issued to it by the State Corporation Commission ("SCC"). Any Offeror/Bidder that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law shall include in its proposal/bid a statement describing why the Offeror/Bidder is not required to be so authorized. Any Offeror/Bidder described herein that fails to provide the required information shall not receive an award unless a waiver of this requirement and the administrative policies and procedures established to implement this section is granted by the County Administrator or School Superintendant, as applicable.

If this quote for goods or services is accepted by the County of Fauquier, Virginia, the undersigned agrees that the requirements of the Code of Virginia Section 2.2-4311.2 have been met.

Please complete the following by checking the appropriate line that applies and providing the requested information.

A. _____ Offeror/Bidder is a Virginia business entity organized and authorized to transact business in Virginia by the SCC and such vendor's Identification Number issued to it by the SCC is _____.

B. _____ Offeror/Bidder is an out-of-state (foreign) business entity that is authorized to transact business in Virginia by the SCC and such vendor's Identification Number issued to it by the SCC is _____

C. _____ Offeror/Bidder does not have an Identification Number issued to it by the SCC and such vendor is not required to be authorized to transact business in Virginia by the SCC for the following reason(s):

Please attach additional sheets if you need to explain why such Offeror/Bidder is not required to be authorized to transact business in Virginia.

Legal Name of Company (as listed on W-9)

Legal Name of Offeror/Bidder

Date

Authorized Signature

Print or Type Name

Return This Page

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