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## URBAN ANALYTICS, INC.

REAL ESTATE AND URBAN PLANNING CONSULTANTS

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Urban Analytics, Inc. – Proposal No. P-191120-TMI

November 25, 2019

Craig M. Adams, M.B.A.  
McHenry Township Supervisor  
McHenry Township  
3703 North Richmond Road  
Johnsburg, Illinois 60051

Re: Proposal for Comprehensive Cost Benefit Analysis Study  
(815) 385-5605

Dear Mr. Adams:

On behalf of Urban Analytics, I am pleased to respond to your request for consultant services to conduct a cost benefit analysis study as described in the above-referenced RFP. My company, Urban Analytics, Inc., was founded in 1996 and has a demonstrated history of conducting cost-benefit analyses, economic impact analyses, fiscal impact analyses, analyses of development economics, and long-range forecasting of municipal growth due to land-use development. Now in our 23<sup>rd</sup> year of business, we have provided consulting services in twenty-one (21) states for public sector, private sector, and institutional sector clients.

I am the president and principal researcher of Urban Analytics and an expert in the field of regional economic development policy, especially economic and fiscal impact studies (often referred to as cost-benefit analyses or benefit-cost analyses). I have authored or co-authored over 125 research reports on the fiscal and economic impacts on the budgets of municipalities (states, counties, cities, and towns) of land-use development. Included in these research reports are analytical studies on annexation issues and the economic relationship between counties and towns.

Urban Analytics appreciates the opportunity to submit this proposal to the Township of McHenry, Illinois. We feel that we can provide the Township with the best possible combination of expertise, cost-effectiveness, and desired results within the time period specified for this assignment. If you should have any questions regarding this response to your request for proposals, please do not

Craig M. Adams, M.B.A.  
McHenry Township Supervisor  
November 25, 2019  
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hesitate to call. We would be pleased to travel to your office in Johnsburg to discuss this proposal in person with the proposal evaluation committee.

Respectfully submitted,

*Dean D. Bellas*

Dean D. Bellas, Ph.D.  
President

Sent: via Email and by Federal Express: Tracking #8086 2049 5561  
Sent: November 25, 2019

CC: File Copy

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**1 – Understanding the RFP and the Consulting Services Requested**

In the *Objective* section of the RFP, the Township of McHenry, Illinois and the McHenry Township Road District (together in this proposal referred to as the “Client” or “TMI”) would like the Consultant to conduct four separate studies. These studies are: (1) the comprehensive cost-benefit study and analysis that would review all Township services offered to residents; (2) a cost study comparison and benefits analysis if McHenry County took over these functions; (3) a study and analysis if McHenry County only took over the three (3) mandated functions of the Township, as described in the RFP; and (4) the development of objective criteria for measurement to ensure that comprehensive outcomes are achieved in the future. In the *Suggested Criteria to be measured* section of the RFP, these suggested criteria provide guidance to the Consultant as the Consultant conducts the four studies described above. All requested scope of services and suggested measurement criteria are well-within the skill sets of Dr. Bellas and his staff at Urban Analytics.

*Advantages to hiring a Consultant Firm from outside of Illinois*

We understand the topic of townships and high property taxes in Illinois has been debated for many years. This argument, however, is not unique to townships in Illinois. Residents in counties, cities and towns all over the United States frequently debate whether they receive public services sufficient for the taxes they pay to their local jurisdiction. As this topic had been hotly debated in Illinois, we imagine that there are some residents in McHenry Township who would like the Township to be abolished (or dissolved) while there are some residents who would like McHenry Township to continue to remain a separate jurisdiction. As an out-of-state Consultant, Urban Analytics does not have a vested interest in this debate. We do not know anyone who lives or works in the Township or in the County. We can provide a completely un-biased and objective economic analysis of this issue.

For his doctoral dissertation research 15 years ago, Dr. Bellas developed a mathematical model that (with a high degree of accuracy) can calculate the economic relationship between property taxes (and all other local taxes) and the public services that local jurisdictions provide to their residents. Dr. Bellas was fortunate to have the late Dr. Alice Rivlin (the former Vice Chairman of the Federal Reserve under Dr. Alan Greenspan) and the late Dr. John Peterson (a national expert on municipal bond financing) as members of his dissertation review committee. The model that Dr. Bellas developed is a methodological improvement over all fiscal impact models (cost-benefit models in local finance) developed since the early 1900s in the United States. Dr. Bellas has analyzed the relationship between local property taxes and public services in several states, including Maryland, Virginia, West Virginia, Washington, DC, Kansas, New York, Iowa, Oregon, and Mississippi. Because of this demonstrated experience across the United States and over 125 research papers that Dr. Bellas has written analyzing actual conditions (not theoretical) in counties, cities, and towns, we feel that the Township will receive an accurate and unbiased cost-benefit analysis.

## **2 – Response to the Scope of Services**

In this section of our proposal, we break-down and discuss the tasks described in the Scope of services as follows:

*Study 1: Comprehensive CBA*

We will review the Township's audited financial statements and adopted budget for the past three years. We will interview the Township Supervisor and the head of each department in the Township to understand the revenue structure of each department in the Township, and how each department provides public services to the residents, businesses, visitors, and tourists. From the data and information received from the interviews and financial statements, we will develop localized cost-benefit multipliers for every existing land use (single-family, townhouse, multifamily, office, retail, hotels, industrial, and non-profits including local government buildings) in the Township. This is very important. Unlike other consultants, we do not use regional or national multipliers. The cost-benefit multipliers in the Township are different than those in the

County, and these multipliers will be different than those for every township or county in Illinois. We will construct a matrix of costs (expenditures) and benefits (revenues) for every category of public services and public revenues in the Township. Using these local multipliers, we can forecast future revenue and expenditure trends in the Township over the next twenty years. Thus, our cost-benefit analysis will not be static; it will be dynamic. As population, employment and housing growth changes in the Township each year, we can model the impact of these trends on the Township's finances.

#### *Study 2: County Takes Over All Functions*

We will conduct the same interviews and analyze the same type of data at the county level. Cost-benefit analysis and fiscal impact analysis modeling has been well-documented in the literature. Dr. Bellas is a subject matter expert in his field. He knows the data that Urban Analytics will need to run the analyses and we know the proper questions to ask to collect the data necessary to calculate the economic impacts.

We will construct localized cost-benefit multipliers at the county level. We will compare the findings at the Township level to the County level.

#### *Study 3: County Takes Over Three Functions*

From the findings in Study 2, we will isolate the findings for the three (3) mandated functions. We will compare and contrast the findings for Study 1, Study 2, and Study 3.

#### *Study 4: Develop Objective Criteria*

The three sets of findings from the first three studies will be modeled over the next twenty years. We will work closely with the Township senior staff to clearly develop a set of key economic goals to achieve over the next twenty years in five-year increments. These goals and the measurement metrics associated with these goals will then be quantified, and the outcomes will then be analyzed to determine whether keeping the Township intact or dissolving the Township should be recommended.

#### *Project Schedule*

The scope of services outlined above would be undertaken over the time frame listed in the RFP. Dr. Bellas and the Urban Analytics staff are available to work on this engagement with TMI. Urban Analytics has sufficient resources to complete the engagement on time to meet the deadlines as listed in the RFP. *It is the policy of Dr. Bellas and Urban Analytics that projects should be undertaken one at a time.* That is, proposals are not submitted on projects unless the company can budget its resources to completing the engagement at hand. This policy ensures that the quality of work for each economic impact project undertaken by the company remains high. Urban Analytics has the ability to complete this assignment and the designated milestones within the timeframe outlined in the RFP.

For progress reports, we propose a two-step approach. Step one is for Dr. Bellas (as the point-of-contact for Urban Analytics) to have a brief telephone conversation each week with the TMI point-of-contact to Urban Analytics. During this weekly telephone call, the status of the project will be discussed, including the status on data collection, data analysis, identified risks described in our proposal, new identified risks subsequent to the start of the engagement, and progress made each week to ensure that all deliverables can be met at the designated delivery dates. Dr. Bellas will promptly notify the designated TMI representative assigned to this engagement if delays in data collection or other delays relating to this engagement shall arise. This progress telephone call will occur each week for the term of the engagement.

Urban Analytics agrees not to release the initial results or discuss the project with the media or other entities without the prior written approval of TMI. Although not stated in the TMI proposal, Urban Analytics will sign a non-disclosure and confidentiality agreement, if so requested by TMI.

#### *Presentation to the Township*

The initial schedule described in the TMI RFP is reasonable but we will develop a system of checks-and-balances to keep the schedule on track and to expedite the program management planning to minimize slippage if unexpected delays should occur. To ensure efficiency in the delivery of each work product described in the RFP, the program management schedule will be the first item to be completed and we will distribute the draft program management schedule to the TMI senior staff within one week after the initial kick-off meeting. For the weekly progress reports requested in the RFP, Urban Analytics prefers to do this by either telephone or video-conference. We use Zoom video-conferencing software regularly but we are also open to using Ring Central software, if TMI prefers. The beauty of the Zoom or Ring Central video conferencing software is that we can invite participants in-between scheduled meetings relatively quickly and effortlessly. Thus, if changes to the pre-approved project management schedule need to be made to accommodate unexpected issues, Urban Analytics can quickly reach out to all call participants.

#### *What Sets Urban Analytics Apart from Other Consulting Firms*

Urban Analytics is a small consulting firm specializing in economic impact and fiscal impact analyses for the public-sector, the private-sector, and the institutional-sector. The field of expertise of the firm's president, Dr. Dean D. Bellas, is regional economic development policy. Dr. Bellas has over 22 years of experience in economic and fiscal impact consulting.

In every consulting engagement, the Urban Analytics team spends a good amount of time interviewing all stakeholders to gain a complete understanding of local market forces shaping the economy and its economic and industry sectors. Data collection and analysis are also very significant components of any Urban Analytics engagement. Oftentimes, consultants incorrectly assume that a large quantity of economic, demographic, and land use data implies that the findings of their economic impact model are correct. In every consulting assignment, Urban Analytics identifies upfront the data that are needed in order to solve the client's problem or answer the client's questions. If these data are not readily available, then the team at Urban Analytics determines how to collect that data.

Finally, the small size of Urban Analytics is an advantage to the client. When the client picks up the telephone and places a call to Dr. Bellas, the client knows that they are talking to an experienced, seasoned professional and not to a young, inexperienced analyst. **Cost-benefit analysis is a complex analytical process and the use of an economic model (*any* model) without a complete understanding of the assumptions and complexities of the independent and dependent variables will lead to the incorrect application and interpretation of the model's findings.** Urban Analytics is uniquely qualified to quantify and interpret economic, financial and demographic data.

### **3 – Experience in Fiscal & Economic Impact Analyses (Cost-Benefit Studies)**

In this section, we describe our experience in three (3) county and town fiscal impact analyses (cost-benefit studies).

#### *Prince William County, Virginia*

Prince William County was the first opportunity to test and evaluate the model. In fact, the genesis of the fiscal impact model developed by Dr. Bellas was a request from Prince William County to calculate current and projected fiscal impacts over a twenty-year forecast period. Prince William County is located south of Washington, DC along the Interstate 95 corridor. In the 1990s and early 2000s, this county was the fastest growing county (in terms of job growth, population growth, and housing growth) in the Washington, DC metropolitan area. The County was in the process of updating its comprehensive land-use plan and wanted a fiscal impact model that could calculate the fiscal implications of growth over twenty years in five-year increments. County officials were concerned as to what effect on the budget of the County would such growth have if the residential building boom at the time was unrestricted either by market or regulatory forces. A baseline fiscal impact analysis as well as fiscal impact analyses of long-term, alternative growth scenarios occurred. For example, what would be the fiscal impact to the County if growth were restricted due to an external economic shock, such as a decrease in the local economy caused by an economic shock to the U.S. economy? Another analysis conducted was the fiscal implications of implementing the County's entire capital improvement plan (C.I.P.) over the next twenty years.

#### *City of Topeka and Shawnee County, Kansas*

A thirty-year fiscal impact analysis of the comprehensive land-use plan for the City of Topeka, Kansas, and Shawnee County, Kansas metropolitan planning area was conducted. A fiscal impact model was constructed separately for each jurisdiction. Various comprehensive plan scenarios were then run through the model. Kansas is unique in that school children are not limited to going to public school in the unified school district that is located (geographically) closest to a student's residence. Thus, for this engagement, four unified school districts were included in the fiscal impact model. A public school student living in the City of Topeka, for example, has a choice of attending any of the four unified school districts serving the City of Topeka-Shawnee County Metropolitan Planning Area. Thus, the fiscal burden of educating a public school student attending one unified school district would be different than another public school student (living right next

door) who elected to attend another unified school district. Additionally, the City of Topeka, as the seat of the state government, also experienced a unique set of public service expenditures as the City was not just the home to local residents but also home to the state government and a magnet for visitors, tourists and others coming to the City of Topeka for reasons associated with the functions of the state government.

#### *Queen Anne's County, Maryland*

The fiscal impact model that was developed for Queen Anne's County permits a wide range of fiscal assessments on an on-going basis. The model was formulated to test the fiscal impacts of proposed and alternative comprehensive plan revisions. This model has several unique features. Among these, it is the only model existing that differentiates fiscal impacts by land use type at the comprehensive land-use plan level. This was highly significant in the Queen Anne's County engagement as the County was considering placing a moratorium on certain types of residential land uses on Kent Island, the main gateway into the County from Annapolis (to the west) and the County's primary tourism area. The fiscal impact model is also built specifically from local financial (audited) data so that the results reflect specifically the revenue structure of Queen Anne's County and also the types and levels of county services specifically provided to residents and businesses in the County.

A fiscal impact assessment of four growth scenarios in Queen Anne's County in comparison with the baseline forecast for the county was conducted. These four alternative growth scenarios were developed in conjunction with the Queen Anne's County Economic Development Commission. Included in these alternative growth scenarios were: (1) the "No-growth" scenario; (2) the "Slow-growth" scenario; (3) the "Comprehensive Plan-growth" scenario; and (4) a restricted scenario based on a certain pre-determined number of housing units by land-use type.

#### **4 – Qualifications of the Consultant**

From the Latin word "Urbanus" which means *of or relating to the city* and from the classical Greek "Analytikos" which means *of or relating to analysis*, Urban Analytics, Inc., is a real estate and urban planning consulting firm providing high-level urban development analytical services. Now in its twenty-second year of operations, Urban Analytics has provided specialized real estate financial analyses, market research studies, economic and fiscal impact studies, portfolio analyses, and analyses of public policy decisions to private, public and institutional sector clients. Urban Analytics is committed to providing its clients with the most effective analytical techniques available. These techniques include building models for almost any kind of economic, fiscal, financial, and econometric analysis.

Examples of the Company's public-sector and institutional-sector assignments include: a study of housing conditions in Charles County, **Maryland** for the Charles County Board of County Commissioners; a countywide fiscal impact and economic study for the Prince William County, **Virginia** Planning and Finance Departments; a citywide and countywide fiscal impact study (*with multiple school districts*) for the City of Topeka and Shawnee County, **Kansas**; an analysis of the

economic and fiscal impacts of proposed first-time home buyer down payment savings legislation statewide in the states of **Iowa, Mississippi, New York, and Oregon**; a countywide fiscal impact study with long-term growth scenarios (including a no-growth scenario) for the Queen Anne's County, **Maryland** Economic Development Authority; a town-wide fiscal, economic, and capital asset impact study for the eastern shore towns of Trappe, Denton and Vienna, **Maryland**; an economic and fiscal impact analysis of a proposed video lottery terminal (slots) gaming facility in Cecil County, **Maryland** and the Town of Perryville, **Maryland**; a fiscal impact analysis of the **U.S. Government Department of Defense** spending statewide in the State of Virginia; application review services for the U.S. Government *Department of the Treasury* Community Development Financial Institutions Fund; a fiscal and economic impact analysis of a proposed training facility for foreign service personnel for the U.S. Government *Department of State*, Bureau of Diplomatic Affairs in Queen Anne's County, **Maryland**; a social and economic impact analysis of the Joint Base Lewis-McChord Forestry Program in **Washington State** for the *Department of the Army*; a fiscal impact analysis for the Government of the **District of Columbia** for hosting the federal government; and revenue enhancement analyses of the relocation of the *National Science Foundation (NSF)* and *Transportation Security Administration (TSA)* headquarters buildings to the City of Alexandria, **Virginia**.

Examples of the Company's private sector assignments include: developing long-term financial forecasting and market simulation scenarios on almost eight million square feet of existing and build-to-suit commercial office buildings in northern **Virginia**; developing a pro forma model for the proposed Cold War Museum in Lorton, **Virginia**; and various economic impact, fiscal impact, and proffer analyses of large-scale residential and non-residential land use projects *throughout Maryland, Virginia, West Virginia, and the District of Columbia*.

The project team consists of Dr. Dean D. Bellas, Ms. Eva Salgado, Ms. Maria Panteleos, and Ms. Paola J. Lemus-Guevara with Urban Analytics. The descriptive resumes of the project team are as follows:

**Dr. Dean D. Bellas**

*President and Principal Researcher*

Years of Experience in Field: 28 years

With Urban Analytics: 23 years

Company Affiliation: Urban Analytics, Inc.

Relevant Projects:

- Virginia Coastal Zone Management Program (VCZMP) Eastern Shore (Fiscal and Economic Analysis) (**Virginia**)
- Virginia Coastal Zone Management Program (VCZMP) Lower Chickahominy Watershed (Fiscal and Economic Analysis) (**Virginia**)
- Howard County Planning Department/Office of Budget (Fiscal Impact Analysis) (**Maryland**)
- Understanding the Fiscal Impacts of TOD Development (**Virginia, Maryland and the District of Columbia**)



- Delta Associates Transportation Security Administration (TSA) (Fiscal Impact Analysis) **(Virginia)**
- Prince William County Finance Department/Planning Department (Fiscal Impact Analysis) **(Virginia)**
- Central Puget Sound Regional Transit Authority (Sound Transit) 8.5-mile Lynnwood Link Extension Project commuter rail line (Sales Tax Forecasting modeling with linear regression) **(Washington state)**
- Dallas Area Rapid Transit (DART) System 26-mile Cotton Belt commuter rail line (Sales Tax Forecasting modeling with linear regression) **(Texas)**
- 2017 Department of the Army JBLM Forestry Branch (Social and Economic Analysis) **(Washington state)**
- 2017 Oregon State Association of Realtors (Economic and Fiscal Analysis) **(Oregon)**
- 2017 Iowa State Association of Realtors (Economic and Fiscal Analysis) **(Iowa)**
- 2016 Mississippi State Association of Realtors (Economic and Fiscal Analysis) **(Mississippi)**
- 2016 New York State Association of Realtors (Economic and Fiscal Analysis) **(New York)**
- 111 additional economic and fiscal analyses (available on request)

Dean D. Bellas, Ph.D., is president of Urban Analytics, Inc., an Alexandria, Virginia-based real estate and urban planning consulting firm providing urban development analytical services to public, private, and institutional – sector clients. Consulting services include economic and fiscal impact studies, market research analysis, real estate asset management, real estate development economics, project feasibility studies, and the analyses of public policy decisions. Since 1996, Dr. Bellas has provided consulting services in twenty-one (21) states (Arizona, California, Florida, Illinois, Indiana, Iowa, Kansas, Maryland, Michigan, Minnesota, Mississippi, Missouri, New York, North Carolina, Oregon, Texas, Virginia, Washington, West Virginia, Wisconsin, and the District of Columbia). Dr. Bellas has analyzed the fiscal impact on over 98,000 residential units and over 38.7 million square feet of non-residential space. The total value of all land-uses analyzed is estimated to be over \$27 billion. In addition, Dr. Bellas has authored or co-authored over 125 research reports on the fiscal and economic impacts of real estate development.

In addition to Urban Analytics, Dr. Bellas is an adjunct faculty member in the graduate Real Estate program within the School of Continuing Studies at Georgetown University. He has previously been an adjunct faculty member in the Real Estate Development concentration within the School of Architecture and Planning at the Catholic University of America, an adjunct faculty member in the School of Professional Studies in Business and Education at the Johns Hopkins University, an adjunct faculty member in the School of Management at George Mason University, and a graduate teaching fellow at the George Washington University. Dr. Bellas has also taught candidates for the CFA designation on behalf of the Washington Society of Investment Analysts.

Dr. Bellas received a Bachelor of Science in Business Administration from Western New England University with a concentration in Finance (1982), a Master of Urban and Regional Planning from the George Washington University (1993), and his Doctorate in Public Policy with a concentration in regional economic development policy at George Mason University (2005). His doctoral

dissertation was entitled, “*Fiscal Impact Simulation Modeling: Calculating the Fiscal Impact of Development.*” His research interests include regional and local developmental growth patterns, economic and fiscal impact effects of real estate development on municipal government, and economic development policy.

Dr. Bellas is a member of the National Economists Club and Lambda Alpha International, an honorary society for the advancement of land economics. He is a full member of the Urban Land Institute. Dr. Bellas previously sat on ULI’s national *Public Development and Infrastructure Council*. He currently sits on the regional ULI Baltimore-Washington, DC *Transit-Oriented Development (TOD) Council*, and locally on ULI’s Washington District *Regionalism Initiatives Council*. Dr. Bellas was the economic advisor to the Southeast Fairfax Development Corporation Board of Directors in calendar year 2012. He was appointed to the Board of Directors for the 2013 – 2014 term by Supervisor Jeffrey C. McKay (Lee District, Fairfax County, Virginia).

Over the past twenty-three years, Dr. Bellas has provided expert testimony on the economic and fiscal impacts of proposed real estate development projects at public meetings and public hearings of planning commissions and county supervisors meetings, as well as at community outreach meetings. He is fluent in Greek.

### **Ms. Eva Salgado**

*Senior Economic and Market Analyst*

Years of Experience in Field: 13 years

With Urban Analytics: 13 years

Company Affiliation: Urban Analytics, Inc.

Relevant Projects:

- Virginia Coastal Zone Management Program (VCZMP) Eastern Shore (Fiscal and Economic Analysis) (**Virginia**)
- Virginia Coastal Zone Management Program (VCZMP) Lower Chickahominy Watershed (Fiscal and Economic Analysis) (**Virginia**)
- Howard County Planning Department/Office of Budget (Fiscal Impact Analysis) (**Maryland**)
- Understanding the Fiscal Impacts of TOD Development (**Virginia, Maryland and the District of Columbia**)
- Delta Associates Transportation Security Administration (TSA) (Fiscal Impact Analysis) (**Virginia**)
- 2017 Department of the Army JBLM Forestry Branch (Social and Economic Analysis) (**Washington** state)
- 2017 Oregon State Association of Realtors (Economic and Fiscal Analysis) (**Oregon**)
- 2017 Iowa State Association of Realtors (Economic and Fiscal Analysis) (**Iowa**)
- 2016 Mississippi State Association of Realtors (Economic and Fiscal Analysis) (**Mississippi**)



- 2016 New York State Association of Realtors (Economic and Fiscal Analysis) (**New York**)
- 52 additional economic and fiscal analyses (available on request)

Eva Salgado has worked for Urban Analytics since 2006. She is the senior economic and market analyst for the Company. Ms. Salgado has demonstrated experience in all aspects of data collection and data analysis. She graduated from Old Dominion University in Norfolk, Virginia with a Bachelor of Arts in International Studies. Ms. Salgado has traveled extensively throughout Belgium, Belize, Colombia, Cuba, Curacao, Morocco, and Peru. She is fluent in Spanish.

**Ms. Maria L. Panteleos**  
*Senior Research Analyst*



Years of Experience in Field: 3 years  
With Urban Analytics: 3 years  
Company Affiliation: Urban Analytics, Inc.  
Relevant Projects:

- Virginia Coastal Zone Management Program (VCZMP) Eastern Shore (Fiscal and Economic Analysis) (**Virginia**)
- Virginia Coastal Zone Management Program (VCZMP) Lower Chickahominy Watershed (Fiscal and Economic Analysis) (**Virginia**)
- Howard County Planning Department/Office of Budget (Fiscal Impact Analysis) (**Maryland**)
- Understanding the Fiscal Impacts of TOD Development (**Virginia, Maryland and the District of Columbia**)
- Delta Associates Transportation Security Administration (TSA) (Fiscal Impact Analysis) (**Virginia**)
- 2017 Department of the Army JBLM Forestry Branch (Social and Economic Analysis) (**Washington state**)
- 2017 Oregon State Association of Realtors (Economic and Fiscal Analysis) (**Oregon**)
- 2017 Iowa State Association of Realtors (Economic and Fiscal Analysis) (**Iowa**)
- 2016 Mississippi State Association of Realtors (Economic and Fiscal Analysis) (**Mississippi**)
- 2016 New York State Association of Realtors (Economic and Fiscal Analysis) (**New York**)

Maria L. Panteleos has worked for Urban Analytics since 2016. She is the senior research analyst for the Company. Ms. Panteleos graduated from the University of Maryland with a Master's in Library Science in 2001 and from Boston University with a Bachelor of Science in Mechanical Engineering in 1997. Prior to joining Urban Analytics, she worked as a Reference Librarian for the American College of Obstetricians and Gynecologists in Washington, DC. She has excellent research and literature search skills. She is fluent in Greek.

**Ms. Paola J. Lemus-Guevara**  
*Administrative Assistant*



Years of Experience in Field: Since July of 2018  
With Urban Analytics: Since July of 2018  
Company Affiliation: Urban Analytics, Inc.  
Relevant Projects:

- Provides administrative support for all on-going projects

Paola Lemus-Guevara has worked for Urban Analytics since July of 2018. She is a 2017 graduate of Mount Vernon High School. Ms. Lemus-Guevara is currently studying social science at Northern Virginia Community College (NOVA). She is proficient in all programs in Microsoft Office. Ms. Lemus-Guevara has extensive experience in computer presentation software including charts, graphs, and other infographic artwork. She enjoys filmmaking and volunteering at Good Shepard Church in Alexandria, Virginia. She is fluent in Spanish.

**5 – List of References**

(1) Prince William County, Virginia

Christopher Martino  
County Executive  
Prince William County, Virginia  
Email: [communications@pwcgov.org](mailto:communications@pwcgov.org)  
Telephone: (703) 792-6600

(2) City of Topeka-Shawnee County, Kansas

Bill Fiander, AICP  
Neighborhood Planning Manager  
Topeka-Shawnee County Metropolitan Planning Department  
Suite 404  
515 South Kansas Avenue  
Topeka, Kansas 66603-3241  
Telephone: (785) 368-3728  
Fax: (785) 368-2535

(3) Queen Anne's County, Maryland

Joseph Zimmerman Director of Finance Finance Department	Suzanne Eakle Manager Department of Economic Development
---	--

107 North Liberty Street  
Centreville, Maryland 21617

Telephone: 410.758.4064 ext. 182 (Mr. Zimmerman)  
Telephone: 410.758.4418 ext. 179 (Ms. Eakle)  
Fax: 410.758.1170

## 6 – Experience in the Economic Relationship between Counties and Towns

In Maryland, Urban Analytics has conducted fiscal impact and economic impact studies (cost-benefit studies) on the relationship between counties and towns as follows:

<u>Town</u> (annexation of land <i>into</i> the town)	<u>County</u> (land <i>from</i> the county)
Town of Denton	Talbot County
Town of La Plata	Charles County
Town of Trappe	City of Frederick
Town of Vienna	City of Rockville

For every jurisdiction in Maryland where Dr. Bellas has conducted a fiscal impact study or an economic impact study, he has had to thoroughly review and understand the local jurisdiction's financial structure through that jurisdiction's annual financial report or comprehensive annual financial report (CAFR), its budget, and other public documents.

## 7 – About the Firm

Urban Analytics, Inc. is organized as an IRS sub-chapter S corporation. Urban Analytics was incorporated in 1996 in the Commonwealth of Virginia and is in its twenty-third year of operations. The company has one office located in Alexandria, Virginia. The company is comprised of four employees. The U.S. Small Business Administration (SBA) Profile for Urban Analytics, Inc., is listed as **self-certified small disadvantaged business**. Our CAGE Code number in the U.S. Government System for Awards Management (SAM) database is: **7QYG1**.

## 8 – Proposed Budget

The proposed budget is limited by time and the context of the work to be performed. A detailed examination of the required information and all analyses described in the RFP provide the framework for the high level of knowledge that Dr. Bellas brings to this assignment. The results of our work would be based on this combination of factual evidence and our existing knowledge of the principles and practices of cost-benefit analysis (benefit-cost analysis), economic impact analysis, fiscal impact analysis, socioeconomic impact analyses, urban planning, and regional economic development theory, planning and practice.

*Budget for this Engagement*

The proposed fee for professional services is based on a time and material contract. We agree to furnish all the services as specified in the RFP and described in this proposal for a **not-to-exceed** fee (including reimbursable expenses) of **\$49,155**. The break-down of our proposed not-to-exceed fee is \$46,580 for professional services and \$2,575 for reimbursable expenses. This break-down is shown in Table 1. The sub-categories shown in Table 1 are divided into two categories: professional fees and estimated reimbursable expenses.

	Bellas	Salgado	Panteleos	Lemus	Total	Total	Weighted
					Hours	Amount	Average
<b>Table 1: "Not to Exceed" Budget</b>							Hourly
<i>Scope of Work</i>	\$ 250.00	\$ 150.00	\$ 150.00	\$ 40.00			Rate
Study 1: Comprehensive CBA	84.00	20.00	20.00	8.00	132.00	\$ 27,320.00	\$ 206.97
Study 2: County takes over all functions	12.00	20.00	20.00	8.00	60.00	\$ 9,320.00	\$ 155.33
Study 3: County takes over 3 functions	6.00	16.00	16.00	8.00	46.00	\$ 6,620.00	\$ 143.91
Study 4: Develop objective criteria	12.00	0.00	0.00	8.00	20.00	\$ 3,320.00	\$ 166.00
<b>"Not-to-Exceed" Sub-total: Fee</b>	<b>114.00</b>	<b>56.00</b>	<b>56.00</b>	<b>32.00</b>	<b>258.00</b>	<b>\$ 46,580.00</b>	<b>\$ 180.54</b>

  

<i>Expense Reimbursement</i>	<i>Airfare</i>	<i>Hotel</i>	<i>Taxi</i>	<i>Meals</i>	<i>Other</i>	<i>Total Cost</i>
Meeting #1: Initial "Kick-off" Meeting*	\$ 300.00	\$ 750.00	\$ 100.00	\$ 400.00	\$ -	\$ 1,550.00
Meeting #2: Present Draft Findings**	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Meeting #3: Present Final Report	\$ 300.00	\$ 150.00	\$ 100.00	\$ 80.00	\$ -	\$ 630.00
Purchase Data: Wood & Poole data	\$ -	\$ -	\$ -	\$ -	\$ 395.00	\$ 395.00
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Sub-total: Expenses</b>	<b>\$ 600.00</b>	<b>\$ 900.00</b>	<b>\$ 200.00</b>	<b>\$ 480.00</b>	<b>\$ 395.00</b>	<b>\$ 2,575.00</b>

  

<b>Total: Fee + Reimbursable Expenses</b>	<b>Grand Total</b>	<b>\$ 49,155.00</b>
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*Note:*

\*Includes five (5) days for interviews with all staff at the Township and County levels.

\*\*To save the Township money, we propose to hold Meeting #2 by video-conference at no cost to the Township.

In Table 1, the weighted-average hourly rate for an estimated 258 hours is \$180.54 per hour. At 40 hours per week, the estimated 258 hours equates to 6.45 weeks (say, 6.5 weeks). If the contract is awarded on December 12, 2019 (as per page 3 of the RFP), and factoring in the Christmas, New Year's, Martin Luther King, and Presidents' Day holidays, it is reasonable for us to deliver the completed study results and final report by the February 21, 2020 deadline stated on page 3 of the RFP.

*Hourly Rates for Optional (Additional) Work*

In Table 2, we provide our private-sector and public-sector hourly rates. For any additional work requested by the TMI (above and beyond the scope of work for the fixed, flat fee quoted above), we will charge the TMI our **public-sector** rates. These public-sector rates are substantially discounted from our private-sector rates.

**Table 2: Hourly Rate Schedule**

<u>Title</u>	<u>Staff</u>	2019 <u>Private Sector*</u>	2019 <u>Public Sector*</u>	<u>Public Sector</u> <u>Discount</u>
President & Principal Researcher	Dr. Bellas	\$ 350.00	\$ 250.00	-40.00%
Manager	(not needed)	\$ 250.00	\$ 200.00	-25.00%
Senior Analyst (Analyst #1)	Ms. Salgado	\$ 175.00	\$ 150.00	-16.67%
Senior Analyst (Analyst #1)	Ms. Panteleos	\$ 175.00	\$ 150.00	-16.67%
Analyst (Analyst #2)	(not needed)	\$ 150.00	\$ 125.00	-20.00%
Junior Analyst (Analyst #3)	(not needed)	\$ 125.00	\$ 100.00	-25.00%
Administrative Assistant	Ms. Lemus-Guevara	\$ 50.00	\$ 40.00	-25.00%

*Note:*

\* These are our fully-loaded rates and include labor, general & administrative, fringe, facility costs, and profit.

We understand that other firms may charge lower hourly rates. However, the expertise of Dr. Bellas in his field is both substantial and well-documented. We can analyze in one hour what other analysts would do in two or three hours. If the Township would like additional analyses conducted, we would charge the Township (1) the public-sector rates in the table above and (2) efficiently conduct the analyses utilizing fewer billable hours than other firms with less expertise.

This is the last page of our proposal. Thank you most kindly for the opportunity to submit this proposal to the Township of McHenry, Illinois. - - *Dr. Bellas*