

# Retail Analysis Request for Qualifications



1. **Introduction:** The City of Southlake, Texas desires consulting services to analyze and report on various aspects of the Retail market in the City. This Request for Qualifications (RFQual) outlines the needs of the City and the requirements for submitting qualifications to perform the service.
  - A. **Purpose:** The Purpose of this Project is to evaluate the existing, near term, and long term capacity of the City to support Retail businesses.
  - B. **Southlake Values:** The selected firm will be expected to conduct business in a manner consistent with the City's organizational values which are represented in the City's Strategy Map on Exhibit A.
  - C. **Project Manager:** The Project Manager for the Project shall be the Director as identified below.
  - D. **Budget:** The City anticipates a total cost not to exceed \$40,000 for the Project. All proposed services should be based on a realistic ability to deliver these services within budget.
  
2. **Definitions:**
  - A. **Agreement:** Shall mean a Services Agreement between the City and the Consultant after evaluation of submitted RFQual's and upon selection of the desired Consultant.
  - B. **City:** Shall mean the City of Southlake, Texas.
  - C. **Committee:** Shall mean the Retail Analysis Committee as appointed by the City Council.
  - D. **Consultant:** Shall mean the company responding to this RFQual.
  - E. **Director:** Shall mean the Director of Planning and Development Services for the City.
  - F. **Project:** Shall mean the coordinated and comprehensive work performed by the City and by the Consultant as defined herein.
  - G. **Retail:** Shall mean businesses selling items and restaurants providing food services which generate sales tax for the City.
  - H. **Request for Qualifications (RFQual):** Shall mean this document.
  - I. **Service:** Shall mean the work performed by the Consultant.
  
3. **Background Information:** Following is a snapshot summary of information about the City. Additional information can be found on the City's website at [www.CityofSouthlake.com](http://www.CityofSouthlake.com).
  - A. **Geography:** The City is approximately 21.5 square miles in size. The City is immediately west of Grapevine, approximately 10 minutes from DFW International Airport.
  - B. **Population:** The current estimated population for the City is 27,500.
  - C. **Build-out:** The city is expected to have a 35,000 build-out population with 10,937 residential units.
  - D. **Demographics:** The City has an educated and wealthy residency. Sixty-four percent of the residents 25 years and older have obtained a bachelor's degree. The average household income is \$206,454, the highest per-capita income for cities over 20,000 population in the nation. The average home sale price is approximately \$600,000.

E. Labor Force and Economic Base:

- Labor Pool from Southlake

Within 5 miles:	58,692
Within 10 miles:	245,571
Within 20 miles:	1,285,186

F. Transportation: The City transportation system is roughly based on a one-mile grid system for arterials and collector roadways. The City has a Capital Improvement Program which has been improving roadways for some time and has plans for more in the future. The City is fortunate to have several major transportation corridors traversing the City as follows:

- S.H. 114: State Highway 114 is an existing 12-lane, grade-separated highway traversing the City from the southeast to the northwest. S.H. 114 is the primary transportation corridor connecting DFW International Airport to the Fort Worth Alliance Airport. The highway has three (3) lanes in each direction, with 3-lane frontage roads along the majority of the highway.
- F.M. 1709 (Southlake Blvd): Southlake Blvd. is a 6-lane roadway with a median the majority of its length. Traffic signals (TxDOT) are located at major intersections. This roadway traverses the City from east to west and is currently the primary roadway for Retail.
- F.M. 1938 (Davis Blvd): Davis Blvd traverses the City from south to north along the western portion of the City. This roadway connects Loop 820 in North Richland Hills up to S.H. 114 in Westlake.

G. Planning Documents: The City has a history of closely following adopted planning documents. Following are current planning documents which may have an impact on the Project.

- Southlake 2030 Plan: The Southlake 2030 Plan components are listed on the City's website ([www.southlake2030.com](http://www.southlake2030.com)) and include the following:
  - Future Land Use Plan
  - Mobility Master Plan
  - Economic Development & Tourism Strategic Plan

These planning documents will provide the following information:

- 1) The amount of developed versus undeveloped land designated for commercial, office and residential.
  - 2) The ultimate roadway network planned for the City.
  - 3) The City's current economic and marketing and business attraction strategies.
- Business Retention & Expansion Plan: The BRE Plan was adopted by the City on February 15, 2011 and includes a SWOT analysis on all the major commercial business categories in the City.

- H. **Regulations:** The City has developed a comprehensive set of development regulations over the years. Following are some which are most likely important to Retail and commercial development:
- i. **Concept Plan / Site Plan Approval:** All commercial developments or redevelopments require Concept Plan and/or Site Plan approval by the Planning and Zoning Commission (P/Z) and the City Council prior to a building permit being issued. There is also a highly recommended public briefing process called SPIN which is held prior to the PZ meeting.
  - ii. **Building Articulation:** The City has criteria based on ratios to the height of a building, which typically require certain modifications to façade architecture
  - iii. **Landscape Ordinance:** The City has a landscape ordinance which requires a variety of Canopy Trees, Accent Trees, shrubs and other landscape material based on the square footage and zoning of the buildings.
- I. **Tourism Draws:** The City implements a variety of programs supporting tourism. Much of this is summarized on [www.VisitSouthlakeTexas.com](http://www.VisitSouthlakeTexas.com). Following are representative tourist attractions in the City.
- i. **Hilton Hotel:** This 248 room, full-service hotel, including approximately 15,000 square foot of conference space, is currently the only hotel in the City and is located in Southlake Town Square. For more information, visit [www.SouthlakeHilton.com](http://www.SouthlakeHilton.com).
  - ii. **Gateway Church:** This large church sits on approximately 200 acres on the north side of S.H. 114 between Carroll and Kimball. They have approximately 10-15 major events and conferences each year which draw approximately 800,000 people collectively. In addition, church services draw approximately 15,000 people each weekend. For more information, visit [www.GatewayPeople.com](http://www.GatewayPeople.com).
  - iii. **Southlake Town Square:** Southlake Town Square is an internationally renowned lifestyle center which serves as the City's downtown. It is located in the heart of the City east of Carroll Ave between S.H. 114 and Southlake Blvd. Town Square includes approximately 125 acres and currently includes approximately 600,000 square feet of retail/restaurant, 226,000 square feet of office and 100,000 square feet of governmental use. For more information, visit [www.SouthlakeTownSquare.com](http://www.SouthlakeTownSquare.com).
  - iv. **Youth Sports Tournaments.** The City of Southlake annually hosts 40 youth sports tournaments including soccer, baseball, softball and basketball. It is estimated these events draw approximately 60,000 people a year to the city.

4. **Anticipated RFQual Process:**

- A. **Deadline:** The DEADLINE for submitting a response to this RFQual request shall be 3:00 p.m. CST., Friday, December 13th, 2013.
- B. **Questions:** Questions regarding this RFQual will only be accepted in writing to the Project Manager, Mr. Ken Baker Director of Planning and Development Services at [kbaker@ci.southlake.tx.us](mailto:kbaker@ci.southlake.tx.us). The deadline for all questions is Wednesday, December 4<sup>th</sup>, 2013 at 5:00 p.m. Questions will be accumulated, answered and posted to the City's website no later than Friday December 6, 2013. (Parties submitting questions shall not be identified with the questions.)

- C. Submittals: All submittals will be evaluated against the submittal requirements noted below. Sealed responses shall be addressed and delivered to:
- Ms. Alicia Richardson  
City Secretary  
City of Southlake  
1400 Main Street, Suite 270  
Southlake, Texas 76092
- D. Evaluation: The Committee shall be responsible for the review and analysis of the submitted RFQual responses and selection of the Consultant.
- i. Evaluation Factors: Factors to be considered for evaluation include, but are not limited to the following:
- Relevant experience of the Consultant team
  - References
  - Ability to generate and analyze market data
  - Ability to communicate an understanding of the desired services
  - Available resources to perform the service, including time and staff
- ii. Consultant Interview: The Committee may decide to interview a short list of Consultants to better understand their capabilities prior to selection.
- E. Negotiation of Agreement: Upon the Committee's selection of a desired Consultant, the Project Manager shall work with the Consultant to finalize an Agreement for Services.

5. Goals of the Service: Following are the currently anticipated goals for this Project. Additional recommendations or revisions from the Consultant as part of the RFQual submittal are encouraged.

- A. Understand the Retail currently in the City.
- i. Current square footage of Retail (provided by City)
- ii. Estimated revenues per square foot for various categories of Retail
- B. Understand the trade area served by various categories of Retail in the City.
- C. Understand the viability and sustainability of the Ultimate Retail Recommendations of Adopted Planning Documents.
- i. Analyze existing and future Retail against existing and future demand for Retail
- ii. Consider competing markets in the City's trade area
- iii. Understand the probability of redevelopment long term in the City
- iv. Understand the existing and future factors which might impact the success of Retail in the City such competition, technology, demographic changes and shopping preferences.
- D. Understand the historical and projected sales tax trends.
- E. Summarize data, analysis, and recommendations to sustain the City as a viable Retail provider, optimizing revenues generated by Retail businesses, while paying attention to the high-quality lifestyle standards familiar to residents of the City.
- i. What types of Retail are under-served in the City?
- ii. What types of Retail are supportable long term and should be attracted (target retail)?

- iii. What is a reasonable amount of retail (square footage) the City can support by types given future market and demographic trends, future shopping habits and expectations as well as competition?
- iv. What is the potential sales volumes/tax revenue as a result of new retail?
- v. What additional components (i.e., daytime population base and tourists) are available to help support retail?
- vi. Provide recommendations which will increase the likelihood of the City maintaining a sustainable retail base.

6. **Provided by the City:**

- A. **GIS Mapping Resources:** The City maintains a robust GIS mapping system with considerable mapping resources including existing and future land uses, developed-undeveloped properties and zoning.
- B. **Summary of Commercial Developments:** The City maintains a Summary of Commercial Developments in a spreadsheet format which distinguishes between various categories of land use and their respective square footages.
- C. **Database of City Businesses:** The City maintains a database of all businesses in the City. This information is available on the City's website at [www.SouthlakeBusinesses.com](http://www.SouthlakeBusinesses.com).
- D. **Traffic Counts:** The City contracts for traffic counts at several locations throughout the City. The Traffic Count Report is on the website at [www.CityofSouthlake.com](http://www.CityofSouthlake.com)
- E. **Copies for Meetings:** Utilizing digital documents provided by the Consultant, the City shall make all copies necessary for Committee meetings or other public meetings.

7. **RFQual Response Requirements:** The Consultant's response to the RFQual should include the following items at a minimum.

- A. **Qualifications:** Provide an overview of qualifications relevant to the services desired. This should include ability to:
  - i. Generate and analyze data
  - ii. Understand land use planning
  - iii. Understand and explain trade areas, market dynamics, etc.
- B. **Similar Work Product:** Provide a summary of prior services which are similar in scope of work to these desired services. A format for this summary is provided in Exhibit C.
- C. **References:** If different from or in addition to the Work Product references, provide a summary of references and their full contact information.
- D. **Project Team:** Provide a summary of each staff member expected to work on the Project including their role, education and expertise relevant to the desired services.
- E. **Approach:** Provide an overview of how the Project would be accomplished, phasing, deliverables, billing, etc.
  - i. Meetings: Include appropriate involvement of the following.
    - Staff: Generating data, refining research, reviewing deliverables, etc.
    - Committee: Providing direction, feedback
    - Public Input: Opportunity for general public to comment on near-final products

- F. Deliverables by Consultant: Describe the anticipated deliverables for each phase.
- G. Anticipated Costs: Understanding the budget noted in Section 1, provide an estimate of services proposed.
- H. Submittals: Consulting firms must submit all requested information contained herein in the format as requested. Firms shall provide a cover letter and submittals shall be in 8-1/2" X 11" format with 11"X17" foldouts, if applicable. The applicant must submit six (6) copies and an electronic copy, preferably in Adobe Reader format (.pdf).

8. **Exhibits**:

- A. Southlake Strategy Map
- B. Aerial Map
- C. Similar Work Product Format

9. **Terms and Conditions**:

**Delivery of Products and/or Services**

- A. Payment Terms: Unless otherwise specified in the Scope of Services or otherwise agreed to in writing by the City, payment terms for the City are Net 30 days upon receipt of invoice.
- B. Warranty of Products and Services: All products furnished under this contract shall be warranted to be merchantable and good quality and fit for the purposes intended as described in this Proposal, to the satisfaction of City and in accordance with the specifications, terms, and conditions of the Scope of Services, and all services performed shall be warranted to be of a good and workmanlike quality, in addition to, and not in lieu of, any other express written warranties provided.
- C. Late Delivery or Performance: If Proposer fails to deliver acceptable goods or services within the timeframes established in the Project Schedule, the City shall be authorized to purchase the goods or services from another source and assess any increase in costs to the defaulting Proposer, who agrees to pay such costs within ten days of invoice.
- D. Title to Goods and Risk of Loss: For goods to be provided by Proposers hereunder, if any, the title and risk of loss of the goods shall not pass to City until City actually receives, takes possession, and accepts the goods and the installation of such goods, has tested the system, and determined that it is in good and acceptable working order.

10. **Miscellaneous**

- A. Independent Contractor: Proposer agrees that Proposer and Proposer's employees and agents have no employer-employee relationship with City. Proposer agrees that if Proposer is selected and awarded a contract, City shall not be responsible for the Federal Insurance Contribution Act (FICA) payments, Federal or State unemployment taxes, income tax withholding, Workers Compensation Insurance payments, or any other insurance payments, nor will City furnish any medical or retirement benefits or any paid vacation or sick leave.

- B. Assignments: The rights and duties awarded the successful Proposer shall not be assigned to another without the written consent of the Purchasing Manager. Such consent shall not relieve the assigner of liability in the event of default by the assignee.
- C. Liens: Proposer shall indemnify and save harmless the City against any and all liens and encumbrances for all labor, goods, and services which may be provided to the City by Proposer or Proposer's vendor(s), and if the City requests, a proper release of all liens or satisfactory evidence of freedom from liens shall be delivered to the City.
- D. Gratuities / Bribes: Proposer certifies that no bribes in the form of entertainment, gifts, or otherwise, were offered or given by the successful Proposer, or its agent or representative, to any City officer, employee or elected representative, with respect to this RFP or any contract with the City, and that if any such bribe is found to have been made this shall be grounds for voiding of the contract
- E. Financial Participation: Proposer certifies that it has not received compensation from the City to participate in preparing the specifications or RFQual on which the Proposal is based and acknowledges that this contract may be terminated and/or payment withheld if this certification is inaccurate.
- F. Required Licenses: Proposer certifies that he holds all licenses required by the State of Texas for a provider of the goods and/or services described by the Scope of Services herein.
- G. Authority to Submit Proposal and Enter Contract: The person signing on behalf of Proposer certifies that the signer has authority to submit the Proposal on behalf of the Proposer and to bind the Proposer to any resulting contract.
- H. Compliance with Applicable Law: Proposer agrees that the contract will be subject to, and Proposer will strictly comply with, all applicable federal, state, and local laws, ordinances, rules, and regulations.

#### **11. Financial Responsibility Provisions**

- A. Insurance: The Proposer, consistent with its status as an independent contractor, shall carry, and shall require any of its subcontractors to carry, at least the following insurance in such form, with such companies, and in such amounts (unless otherwise specified) as City may require:
  - i. Worker's Compensation and Employer's Liability insurance, including All States Endorsement, to the extent required by federal law and complying with the laws of the State of Texas;
  - ii. Commercial General Liability insurance, including Blanket Contractual Liability, Broad Form Property Damage, Personal Injury, Completed Operations/Products Liability, Premises Liability, Medical Payments, Interest of Employees as additional insureds, and Broad Form General Liability Endorsements, for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage on an occurrence basis;

- iii. Comprehensive Automobile Liability insurance covering all owned, non-owned or hired automobiles to be used by the Contractor, with coverage for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage.

12. **Indemnification:** Proposer agrees to defend, indemnify and hold harmless the City, all of its officers, Council members, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages and liabilities, including reasonable attorneys' fees, court costs and related expenses, arising out of, connected with, or resulting from any acts or omissions of Proposer or any agent, employee, subcontractor, or supplier of Proposer in the execution or performance of this contract without regard to whether such persons are under the direction of City agents or employees.



## Exhibit A – Southlake Strategy Map



## Exhibit B – Aerial Map



### Exhibit C – Similar Work Product Summary

<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		
<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		
<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		
<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		
<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		
<b>Project Title:</b>		<b>Date of Service:</b>
<b>Client</b>	<b>Scope of Work</b>	<b>Deliverables</b>
Name	•	•
Title	•	•
City of ...	•	•
PH:	•	•
EM:		