RESOLUTION NO. 2393

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BONNEY LAKE, PIERCE COUNTY, WASHINGTON, AUTHORIZING A CONTRACT WITH BERK CONSULTING, INC. FOR THE PREPARATION OF AN ECONOMIC DEVELOPMENT PLAN AND MARKET ANALYSIS.

WHEREAS, the City of Bonney Lake is in the process of updating the City’s Economic Vitality Element as part of the update of the Bonney Lake Comprehensive Plan; and

WHEREAS, the City Council has decided to engage the services of a consultant to prepare an Economic Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, an Economic Development Strategic Action Plan identifying programs and projects to foster economic growth and development in the City, and a Non-Retail Market Analysis for specific industries to determine the viability of each industry within the City as part of the update to the Economic Vitality Element;

NOW THEREFORE, BE IT RESOLVED, that the City Council of the City of Bonney Lake, Washington, does hereby authorize the Mayor to sign the attached agreement with Berk Consulting, Inc. for the preparation of an Economic Development Plan and Market Analysis in the amount of $35,000

PASSED by the City Council this 24th day of June, 2014.

ATTEST:

Harwood T. Edvalson, City Clerk

APPROVED AS TO FORM:

Kathleen Haggard, City Attorney

Neil Johnson Jr., Mayor
PROFESSIONAL SERVICES AGREEMENT

This Professional Services Agreement (“Agreement”) is made and entered into this 24th day of June, 2014, by and between the City of Bonney Lake (“City”) and Berk Consulting, Inc. (“Consultant”).

The parties hereby agree as follows:

1. **Scope of Work.** The Consultant shall perform all work and provide all materials described in the Scope of Work set out in Exhibit A attached hereto and incorporated herein by this reference. Such work shall be performed using facilities, equipment and staff provided by Consultant, and shall be performed in accordance with all applicable federal, state and local laws, ordinances and regulations. The Consultant shall exercise reasonable care and judgment in the performance of work pursuant to this Agreement. The Consultant shall make minor changes, amendments or revisions in the detail of the work as may be required by the City, such work not to constitute Extra Work under this Agreement.

2. **Ownership of Work Product.** Documents, presentations and any other work product produced by the Consultant in performance of work under this Agreement shall be tendered to the City upon completion of the work, and all such product shall become and remain the property of the City and may be used by the City without restriction; provided, that any such use by the City not directly related to the particular purposes for which the work product was produced shall be without any liability whatsoever to the Consultant.

3. **Payment.** The Consultant shall be paid by the City for completed work and services rendered under this Agreement pursuant to the rates and charges set out in Exhibit B, attached hereto and incorporated herein by this reference. Such payment shall be full compensation for work performed or services rendered and for all labor, materials, supplies, equipment, and incidentals necessary to complete the work. All billings for compensation for work performed under this Agreement shall list actual time and dates during which the work was performed and the compensation shall be figured using the rates set out in Exhibit B; provided, that payment for work within the Scope of Work (Exhibit A) shall not exceed the fee/hour estimate set out in Exhibit B without written amendment to this Agreement, agreed to and signed by both parties.

Acceptance of final payment by the Consultant shall constitute a release of all claims, related to payment under this Agreement, which the Consultant may have against the City unless such claims are specifically reserved in writing and transmitted to the City by the Consultant prior to acceptance of final payment. Final payment shall not, however, be a bar to any claims that the City may have against the Consultant or to any remedies the City may pursue with respect to such claims.

The Consultant and any sub-consultants shall keep available for inspection, by the City, for a period of three years after final payment, the cost records and accounts pertaining to this Agreement and all items related to, or bearing upon, such records. If any litigation, claim or audit is started before the expiration of the three-year retention period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved. The three-year retention period shall commence when the Consultant receives final payment.
9. **Termination by City.** The City may terminate this Agreement at any time upon not less than ten (10) days written notice to Consultant, subject to the City's obligation to pay Consultant in accordance with subsections A, B, and C below.

   A. In the event this Agreement is terminated by the City other than for fault on the part of the Consultant, a final payment shall be made to the Consultant for actual cost of work complete at the time of termination of the Agreement. In addition, the Consultant shall be paid on the same basis as above for any authorize Extra Work completed. No payment shall be made for any work completed after ten (10) days following receipt by the Consultant of the termination notice. If the accumulated payment(s) made to the Consultant prior to the termination notice exceeds the total amount that would be due as set forth in this subsection, then no final payment shall be due and the Consultant shall immediately reimburse the City for any excess paid.

   B. In the event the services of the Consultant are terminated by the City for fault on the part of the Consultant, subsection A of this section shall not apply. In such event the amount to be paid shall be determined by the City with consideration given to the actual costs incurred by the Consultant in performing the work to the date of termination, the amount of work originally required which was satisfactorily completed to date of termination, whether that work is in a form or of a type which is usable by the City at the time of termination, the cost to the City of employing another person or firm to complete the work required and the time which may be required to do so, and other factors which affect the value to the City of the work performed at the time of termination. Under no circumstances shall payment made under this subsection exceed the amount which would have been made if subsection A of this section applied.

   C. In the event this Agreement is terminated prior to completion of the work, the original copies of all work products prepared by the Consultant prior to termination shall become the property of the City for its use without restriction; provided, that any such use by the City not directly related to the particular purposes for which the work product was produced shall be without any liability whatsoever to the Consultant.

10. **Termination by Consultant.** Consultant may terminate this Agreement only in response to material breach of this Agreement by the City, or upon completion of the work set out in the Scope of Work and any Extra Work agreed upon by the parties.

11. **Applicable Law; Venue.** The law of the State of Washington shall apply in interpreting this Agreement. Venue for any lawsuit arising out of this Agreement shall be in the Superior Court of the State of Washington, in and for Pierce County.

12. **Indemnification / Hold Harmless.** Consultant shall defend, indemnify and hold the City, its officers, officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including attorney fees, arising out of or resulting from the acts, errors or omissions of the Consultant in performance of this Agreement, except for injuries and damages caused by the sole negligence of the City.

13. **Insurance.** The Consultant shall procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees.
D. Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best rating of not less than A:VII.

E. Verification of Coverage

Consultant shall furnish the City with original certificates and a copy of the amendatory endorsements, including but not necessarily limited to the additional insured endorsement, evidencing the insurance requirements of the Consultant before commencement of the work.

14. **Subletting or Assigning.** The Consultant shall not sublet or assign any of the work covered by this Agreement without the express written consent of the City.

15. **Entire Agreement.** This Agreement represents the entire Agreement between the parties. No change, termination or attempted waiver of any of the provisions of the Agreement shall be binding on any party unless executed in writing by authorized representatives of each party. The agreement shall not be modified, supplemented or otherwise affected by the course of dealing between the parties.

16. **Waiver.** Failure by any party to this Agreement to enforce any provision of this Agreement or to declare a breach shall not constitute a waiver thereof, nor shall it impair any party’s right to demand strict performance of that or any other provision of this Agreement any time thereafter.

17. **Severability.** If any provision of this Agreement or its application is held invalid, the remainder of the Agreement or the application of the remainder of the Agreement shall not be affected.

18. **Execution and Acceptance.** This Agreement may be executed in several counterparts, each of which shall be deemed to be an original having identical legal effect. The Consultant hereby ratifies and adopts all statements, representations, warranties, covenants, and agreements contained in the supporting materials submitted by the Consultant, and does hereby accept the Agreement and agrees to all of the terms and conditions thereof.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

CITY OF BONNEY LAKE

By: [Signature]
Neil Johnson, Mayor

CONSULTANT

By: [Signature]
Berk Consulting, Inc.

Attachments:

- Exhibit A: Scope of Work
- Exhibit B: Budget Worksheet and Consultant Rates
Phase 1 – SWOT and Market Analysis

Task 1: Strength, Weakness, Opportunity and Threat Analysis

The consultant will prepare a SWOT Analysis identifying the internal and external factors that favorably and unfavorably influence economic development in the City. These factors include, but are not limited to, location, access, transportation and transit, housing, available land, infrastructure, public service capacity, and the surrounding trade market.

The City has developed and provided a Community Profile that included a summary of the local economy such as the City’s demographics (e.g. population, income, age, etc.) and employment (e.g. jobs-housing balance, employment by category, taxable sales, etc.).

Deliverable: SWOT Analysis

Task 2: Market Analysis: Hotels, Flex-Office, Warehousing/Logistics, and Light Manufacturing

The purpose will be to first increase the understanding of the City’s current economic structure and then to identify target economic opportunities that are both realistic and compatible. Existing and emerging industries will be identified and discussed in terms of their potential to expand or grow within the City. This report will focus on four types of development: hotels, flex-office, warehousing/logistics, and light manufacturing.

Deliverable: Market Analysis

Phase 2 – Options Analysis and Strategy Development

Task 3: Economic Development Alternatives

This analysis will build on the SWOT and Market Analysis prepared in Phase 1. The focus will be to establish specific alternatives for the retention and attraction of business, quality employment opportunities, and sustainable City revenues. The alternatives will be reviewed in conjunction with adopted City policies.

Deliverable: Alternatives

Task 4: Economic Development Strategic Action Plan

Based upon the alternatives established in Phase II - Task 3, a strategic action plan will be prepared. Specific programs, activities, and tasks will be identified to implement the economic development alternatives.

Deliverable: Final Action Plan
### Phase 1: SWOT and Market Analysis

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Brian Murphy, Project Manager</th>
<th>Kevin Gifford, Lead Analyst</th>
<th>Kevin Ramsey, Market Analyst</th>
<th>Michael Hodgins, Municipal Finance Expert</th>
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**Total Estimated Hours**: 44 94 50 6 38 232

**Cost (Hours x Rate)**: $10,120 $13,160 $7,000 $1,500 $2,850 $34,630

**Subtotal Consultant Cost**: $34,630

**Project Expenses @ ~1%**: $370

**Estimated Project Total**: $35,000
May 16, 2014

Attn: Jason Sullivan, Senior Planner
City of Bonney Lake
9002 Main Street East, Suite 300
Bonney Lake, WA 98391-0944

RE: City of Bonney Lake Economic Development Plan and Market Analysis

Dear Mr. Sullivan and the Consultant Selection Panel:

BERK Consulting is pleased to submit our qualifications and proposal to support the City of Bonney Lake in the creation of an Economic Development Plan and Market Analysis. This Plan will be incorporated in the City’s Comprehensive Plan Update as the Economic Vitality chapter.

We understand this effort will be focused on two important tasks: 1) updating the City’s understanding of its competitive market position and opportunities in the region through SWOT and targeted market analysis; and 2) establishing an action plan to guide City policies, programs, actions, and investments. Marketing materials will be also developed to promote high priority development opportunities to potential investors.

BERK has led dozens of economic development planning efforts at the city and county level in jurisdictions throughout Western Washington, from urban centers such as Bellevue to rural communities such as Stanwood and Carnation. We have worked on similar issues with a number of communities that Bonney Lake has identified as peers in its excellent Community Profile, including the cities of Covington, Lake Stevens, Maple Valley, and University Place.

Our Sustainable Communities and economic development planning practice fosters resilient cities, able to meet challenges as they arise and make wise long-term decisions. Our frameworks and tools integrate land use, economics, and fiscal analysis to help communities create robust, holistic strategies. This balanced approach brings community members, City staff, and elected officials together around compelling visions and actionable strategies.

We look forward to discussing this project with you in detail. In the interim, more information about our firm, approach, team, and client satisfaction can be found on our website: www.berkconsulting.com.

Sincerely,

Brian Murphy, Principal
BERK
SINGLE POINT OF RESPONSIBILITY/ACCOUNTABILITY

BERK Consulting acknowledges that the City requires a single point of contact/authority for this project. Brian Murphy, a Principal at BERK, will serve as this single point of contact/authority and will be the Project Manager.

GENERAL QUESTIONS

1. How many years has your company been in business? How long have you been providing these services? What is your company’s primary line of business? BERK Consulting has been in business for more than 25 years. We were incorporated in the State of Washington in 1988. Our primary business is providing management consulting support to public sector agencies in Washington State.

2. Provide a brief overview of your company (furnish your business philosophy, mission statement, management structure, organization chart, etc.). Founded in 1988, BERK Consulting (BERK) is an interdisciplinary consultancy integrating strategy, planning, and policy development; financial and economic analysis; and facilitation, design, and communications. Our passion is working in the public interest, helping public and nonprofit agencies address complex challenges and position themselves for success. We are known statewide for our depth of knowledge and public policy expertise.

Our Mission is: Helping Communities and Organizations Create their Best Futures. We do this by:

- Integrating the art of effective decision-making with the science of rigorous quantitative and qualitative analysis;
- Bringing people, ideas, and analysis together to generate understanding and consensus on the best strategies and decisions; and
- Bridging across disciplines to synthesize diverse information and facilitate relationships.

A hallmark of our approach is our ability to communicate complex information to a wide-range of audiences, using words, numbers, pictures, and maps to convey information in accessible, understandable formats. We believe that when participants truly understand the issues and options before them, they are able to make good decisions, and then communicate and explain those decisions to the broader community.

Our firm organization chart is below.
3. How many employees do you have? What is the total years' experience your employees have in this profession; what is the average? BERK Consulting has a total of 21 full-time employees. We have 162 years' experience combined, with an average of 8 across the entire BERK team. Our project team has a combined 47 years' experience, with an average of almost 12 years' experience.

4. State the type of ownership of your company. Give the State and date of your incorporation, if applicable. List headquarters and regional/full-service office locations and website address. BERK is a privately owned s-corporation, incorporated in the State of Washington in October 1988. We have a single office location in downtown Seattle. For more information about our firm, please visit our website: www.berkconsulting.com.

5. Provide the key contact name, title, address, telephone, and fax numbers. Also identify the person(s) authorized to contractually bind the organization. Provide resumes for owners and personnel intended to serve on the project team.

   **Primary contact:** Brian Murphy, Principal

   **Address:** BERK Consulting 2025 1st Ave Suite 800 Seattle, WA 98121

   **Phone:** 206-324-8760  **Fax:** 206-324-8965

   Brian will serve as Project Manager, and as a Principal he is able to contractually bind the firm.

   Resumes for the proposed project team are in the Appendix A: Staff Resumes section of this proposal.

6. Please provide status of any current or pending litigation against your company that might affect your ability to deliver the services that you offer. BERK has no current or pending litigation against the firm.

7. Do you anticipate that your company will be acquired in the foreseeable future? Is your company planning to acquire any other companies? It is not anticipated that BERK will be acquired by another firm or acquire any other firm in the foreseeable future.

8. Include the names of three current or former customers (title, phone numbers, and email addresses) that have had a scope of work similar to that described in this RFP.

   - City of Bellevue Economic Development Plan project reference: Dan Stroh, Planning Director, City of Bellevue, 425-452-5255, DStroh@bellevuewa.gov

   - Kenmore Economic Development Plan project reference: Nancy Ousley, Assistant City Manager, City of Kenmore, 425-398-8900, nousley@ci.kenmore.wa.us

   - City of Tumwater Economic Development & Strategic Action Plan project reference: Tim Smith, Planning Manager, City of Tumwater, 360-754-4180, tsmith@ci.tumwater.wa.us
ECONOMIC DEVELOPMENT EXPERIENCE

BERK has led economic development planning efforts at the city and county level in many jurisdictions in Washington. We understand community interest in developing robust economies that promote employment, local shopping and service options, and a fiscal tax base while preserving and building upon our region’s high quality of life and natural and cultural assets. BERK is familiar with the strategies and tools best used to accomplish these complementary goals.

The vast majority of the sample projects listed on the following pages combined facilitation of a project steering committee; community outreach and visioning; detailed demographic, economic, and market analysis; and strategic planning.

**BERK Approach to Actionable Economic Development Strategic Plans**

We believe that a city is best able to maximize its strengths and mitigate challenges when it has a clear and actionable plan in place to align its economy; quality of life and community character; and image and identity. We employ the framework shown below to evaluate opportunities and challenges in each of these areas and create a comprehensive, sustainable economic development plan that integrates each important aspect.

At BERK, economic development planning falls under our multi-disciplinary Sustainable Communities practice. Too often, communities apply only a market-focused lens to economic development. We believe an appropriate and viable economic development plan needs to be informed by the combined tensions of the community’s vision, competitive market position, and fiscal reality, with land use planning and policy development serving as a primary, but not sole strategic lever.
**Relevant Project Experience**

**City of Bellevue**

**Economic Development Plan**

BERK is the final phases of completing the development of the City of Bellevue's Economic Development Plan. The Plan development process built on our facilitation of an interdepartmental staff retreat in 2012 to develop a common understanding about the elements of a successful economic development strategy, and how those elements can be proactively applied in Bellevue.

We worked closely with the Economic Development Planning Committee, comprised of City department leaders, to design a thoughtful and effective strategy. By analyzing quantitative demographic, economic, and market data, as well as conducting individual interviews with over 50 key stakeholders, we developed a detailed Situation Assessment. This Assessment provided the foundation for the development of an action-oriented Plan to guide current and future economic development efforts.

The Economic Development Plan has been developed to align the efforts and expectations of City Council, staff, and partners, and clearly state the City of Bellevue's economic goals and priorities. The Plan is structured around Direct Economic Development Strategies that describe specific actions the City will take to support targeted portions of its economy (including a focus on technology entrepreneurship and positioning Bellevue as a Pacific Rim gateway), and Foundational Strategies that the support quality of life for Bellevue residents and all of Bellevue's businesses and economic clusters.

Besides being an action-oriented guiding document for advancing Bellevue's economy, it is an attractively designed communication tool. In addition, we facilitated the development of an internal Implementation Plan, a companion document to the Economic Development Plan, to capture implementation tactics, responsibility for leading and supporting individual tasks, resource requirements, and partnership opportunities.

We also engaged the Bellevue City Council in the Plan development, by presenting the Plan and seeking input. The Economic Development Plan is expected to be adopted by the City in the summer of 2014.

**City of Tumwater**

**Strategic Plan & Economic Development Plan**

In close collaboration with the Mayor and City Manager, BERK facilitated the City Council through a strategic planning process that addressed multiple complex issues, including the scale and character of desired future economic development and the City's role in facilitating investment in the community. Other topics included strengthening neighborhood identity and investing in place-making in strategic locations throughout the community. The Strategic Plan establishes a Vision for the future of Tumwater and detailed short- and long-term Goals and Strategies to achieve that Vision. The Plan guides the ongoing priorities of City Council and other boards and commissions, the work of City staff, and the City's annual budget-setting process. BERK also designed and facilitated a parallel economic development planning process with its own Citizens Advisory Committee. This Plan, which adheres to the direction established in the Strategic Plan, drew on BERK's fiscal and market analysis to ensure the long-term financial sustainability of the City. The Strategic and Economic Development Plans were unanimously adopted by the City Council.

**City of Kenmore**

**Economic Vitality Strategy**

This project involved working with City staff and a Community Advisory Committee to develop a comprehensive economic development strategy for Kenmore. In addition to facilitation of Committee meetings, BERK staff conducted stakeholder outreach, City Council member focus groups, and a Community Open House. We used targeted market analysis and interviews to assess the City's competitive advantage in certain retail and employment sectors. The Strategy identified four strategic goals and outlined recommended action steps and performance indicators to help ensure successful implementation. The Strategy was unanimously adopted by the City Council on June 1, 2009.
City of University Place
Economic Development
Strategic Action Plan 2002-07: Strategies for a Livable and Economically Sustainable Community

BERK led a two-phase community-wide Economic Development Strategic Action Plan. In Phase I, we designed and facilitated an Economic Development Summit to identify the City's economic development needs, vision, and next steps. This well-attended planning process provided the foundation for Action Plan development. In Phase II, we facilitated a citizen Task Force, supported by BERK's economic, market, and financial analyses, and crafted an economic development implementation plan, including vision, goals, strategies, timeline, and measurable outcomes. The Plan was unanimously adopted by the City Council.

City of Woodinville
Economic Development
Strategic Action Plan: Strengthening Our Unique Community & Economy

BERK facilitated the development of the Plan by the City's Economic Development Task Force. We provided a holistic economic development planning framework, an analytic foundation comprised of quantitative and qualitative research, and strategic planning facilitation. We conducted a comprehensive analysis of the City's demographics, economics, real estate market, land supply, and fiscal realities in the context of the larger region, as well as easy-to-read summaries of existing City analysis and policy document. We incorporated public input via stakeholder interviews and an open house. We developed a concise Situation Assessment that supported the development of an action-oriented Plan to guide current and future economic development efforts by the City and its partners.

City of Mountlake Terrace
Economic Vitality and Sustainability Strategy

BERK provided research, market analysis, strategy development, and public outreach for two complimentary plans for the City of Mountlake Terrace: a Sustainability Strategy and an Economic Vitality Strategy. The Sustainability Strategy defines how the City can lead in environmental sustainability through its practices, policies, and interactions with its partners and the community. The Clean Technology Opportunity Assessment establishes a definition for the emerging clean technology cluster, assesses the City's competitive position, and identifies strategies to cultivate business growth in this sector. The Economic Vitality Strategy builds on the Clean Tech Opportunity Assessment and Sustainability Strategy to establish actionable strategies for economic growth in clean tech and more traditional markets.

City of Stanwood
Economic Development Plan

BERK worked with the City to create an action-oriented plan to strengthen the City's economy and address employment, tourism, and residential quality of life issues. Project components included facilitation of a Citizens Advisory Committee; creation of an Economic Development Profile, a land use assessment; a fiscal analysis; and the creation of a Marketing Plan for effective promotion of the City. We also created a suite of marketing materials for use by the City and its partners in recruiting business and development activity.

City of Hoquiam
Economic Development Strategic Action Plan: 2008-2012 A Focused Plan to Strengthen and Build on Hoquiam’s Core: Housing, Industry, and Business Districts

BERK developed an overall City economic development strategy informed by quantitative and qualitative assessment of the City's key strengths, challenges, and opportunities. The result is an actionable Plan that will serve as a roadmap and guide to City activities and investments. In particular, we analyzed Hoquiam’s downtown — its competitive position, current strategic assets, business and ownership profile, retail offerings, and vacancies — and developed a strategy and organizational structure to advance downtown revitalization. We assessed site-specific opportunities and identified best uses from economic, fiscal, and community perspectives, as well as catalytic actions the City can take to advance desired development. We also developed marketing materials to help promote the City's identity and strengths to the business and development communities.
City of Carnation

**Economic Development Strategic Action Plan: 2008-2012**

BERK developed a strategic economic and community development plan to enhance community assets and plan for future City success. Phase I of the project included facilitating a visioning retreat with City Council, conducting stakeholder interviews, assessing the City's socio-economic profile, and analyzing the impact of various development options on the City's fiscal situation. Phase II included identification of strategic themes based on Phase I work, and facilitation of a Community Forum. Phase III was the writing and Council adoption of the Final Economic Development Strategic Action Plan.

City of Duvall

**Economic Development Strategic Action Plan: 2006-2011**

BERK developed a comprehensive analysis of the City's demographics, economics, real estate market, land supply, and fiscal realities in the context of the larger region. We summarized this information in a concise Situation Assessment that was then used to develop an action-oriented plan to guide economic development efforts by the City and its partners. We also integrated input from the City's Cultural Planning Steering Committee to strengthen the City's draw as a cultural tourism destination. The Plan encompassed numerous arts, culture, and tourism strategies and integrated revitalization strategies in Old Town with actions to attract new residential and commercial development in other parts of town.

Coeur d'Alene Reservation

**Economic Analysis**

BERK analyzed the Coeur D'Alene Reservation's market position and economic development opportunities, building from the vision and ambitions articulated in the Tribe's Comprehensive Economic Development Strategy (CEDS). Quantitative analysis, including location quotients, employment and wage analysis, journey-to-work maps, and estimation of retail sales leakage, were combined with stakeholder interviews to identify target industries with potential for employment generation and retail niches that may be expanded to augment the goods and services available on the Reservation.

Pierce County

**Economic Action Agenda: Interdepartmental Strategic Plan 2006-09**

BERK created an Economic Development Action Plan to align the County's land use planning and infrastructure investments with business recruitment and retention goals. We identified strategic issues, conducted stakeholder interviews and economic analysis, and worked with senior staff, the County Executive, and the County Council to develop a broadly supported Economic Action Agenda and Work Plan.

**STAFF AVAILABILITY**

BERK is available to start the project in June, as outlined in the RFP. Our proposed staff are the staff that would work on the project. Any changes would be brought to the City for approval.

There are no current conditions or scheduling conflicts that would restrict our availability to work on this project.
Summary of our Approach

BERK's Sustainable Communities practice focuses on the interplay among community vision and quality of life, economic development, fiscally sustainable municipal government service provision, and land use. Our team members have the skills and experience necessary to bring an integrated, multi-disciplinary approach to this project, incorporating market and fiscal analysis, land use, strategy development, and communications.

Targeted Market Analysis. Current and future regional market conditions will dramatically affect Bonney Lake's ability to capture its desired share of regional development. The City's Community Profile establishes an excellent analytic foundation. Our approach would be to build on this solid foundation with efficient supplemental analysis focused on the City's target development forms: hotels, flex-office, warehousing/logistics, and light manufacturing.

We will draw on a number of ready resources to describe the market feasibility of each of these uses, including analysis of the City's historic capture of regional development, maps showing the regional distribution of these uses over time, in-house understanding of the drivers behind business location decisions, and stakeholder interviews. Interviews are useful to gain a more nuanced understanding of market perceptions and market realities than can be achieved through quantitative analysis alone.

Fiscal Impacts of Development. Each residential or commercial development, redevelopment, or tenanting will have differential impacts on City tax revenues and service delivery costs. In evaluating desired businesses and land use types, including the targeted development forms noted above, it will be important to screen not only for market feasibility, but also fit with community vision and net fiscal impact.

Effective Strategies Leveraging Land Use Policies, Targeted Actions, and the Whole Community. Bonney Lake's greatest impact on its future economic development will come through the City's land use planning and policy development. The City's Comprehensive Plan is the primary document for Bonney Lake to describe its desired future, and future land use decisions will significantly affect capacity for development and future economic activity. We have included Kevin Gifford, AICP on our team, a land use planner with a strong interest in economic development. Kevin will provide recommendations to best incorporate economic development Vision and Goals in the City's Bonney Lake 2035 Comprehensive Plan update and how the Downtown Plan, Eastown Subarea Plan, and plans, policies, and regulations may facilitate or slow desired development.

In addition to such land use considerations, we will identify actions the City can take to improve the development climate, promote investment opportunities in Bonney Lake, and otherwise support economic vitality. BERK takes a "whole community" approach and it will be important to draw on partners such as the Bonney Lake Chamber of Commerce and Economic Focus Group to identify community-led strategies that can be implemented in concert with City efforts to advance a shared vision and common goals.

Compelling Communications. Bonney Lake has many assets and opportunities for developers and business owners. These will become particularly evident through this project's market analysis, and will be the focus of selected marketing materials. BERK is known for our ability to communicate effectively, using words, charts, maps, and pictures to tell a compelling story to decision makers and potential investors.

Flexible and Collaborative. We see our role as supporting our clients' efforts and ultimate success by providing analysis and insight, as well as expert facilitation and plan development. Our goal is to be collaborative, efficient, and enjoyable partners to work with. We will shape our work program to support ongoing community conversations about economic development, including the work of the Community Development Committee and Economic Focus Group, Planning Commission, and City Council. We would enjoy the opportunity to help you advance towards your established economic development Vision Statement and Goals.
CERTIFICATION REGARDING DEBARMENT
BERK Consulting certifies that we have never been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded for covered transactions by any Federal department or agency. We also certify that within the past three years, we have not been convicted of or had a civil judgment rendered against us for commission of fraud or a criminal offense.

SERVICES AND PRICING
The spreadsheet below details our proposed budget and level of service estimated for this project. We are happy to have further conversation with the City about this cost proposal.

EVIDENCE OF INSURANCE
Please see Appendix B: Evidence of Insurance for a copy of our current insurance, which complies with the minimum required by the City.

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Appendix A:
Staff Resumes
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As a Principal at BERK, Brian’s practice focuses on strategic and economic development planning. Brian has more than a dozen years of experience in strategic planning, economic development, and policy analysis. Brian is a skilled manager of complex analytic and planning projects with many moving pieces and nuanced policy choices. His work bridges financial and market analysis, integrating technical inputs with strategy and policy development for communities, public agencies, and non-profit organizations. His trademark is crafting inspiring and actionable strategies for communities, and writing plans that are succinct, compelling, and accessible for busy decision-makers and members of the public.

Brian holds an M.B.A. from the University of Washington, where he focused on marketing and finance and headed the school’s Net Impact group, which focuses on sustainable business practices. He is also a Leadership Tomorrow graduate.

EDUCATION
- M.B.A., University of Washington, selected for Beta Gamma Sigma Honor Society
- B.A., Politics, University of California at Santa Cruz, graduated with honors

RELEVANT PROJECT EXPERIENCE
- City of Bellevue, Economic Development Plan. Project Manager.
- City of Tumwater, Strategic and Economic Development Planning. Project Manager.
- City of Mountlake Terrace. Economic Vitality and Sustainability Strategy. Project Manager.
- City of Tukwila, Strategic Plan and Strategic Plan Implementation. Project Manager.
- Tukwila Police Department, Strategic Plan. Project Manager.
- Tukwila Fire Department, Strategic Plan. Project Manager.
- City of Snohomish, Strategic Plan. Project Manager.
- City of Bellevue Fire Department, Strategic Plan Update. Project Manager.
- King County Housing Authority, Education Initiative. Project Manager.
- The Seattle Public Library, Strategic Plan. Project Manager
- Municipal Research and Services Center, Strategic Plan. Project Manager and Facilitator.
Michael Hodgins
Municipal Finance Expert

Michael is a Principal and the firm's Finance and Economics practice manager. He specializes in financial, economic and policy studies, including urban land economics, market analysis, growth management issues, fiscal impact and feasibility studies for transportation and development projects, municipal fiscal analyses, and revenue and expenditure forecasting. He is a trusted advisor to many senior managers and elected officials working in state and local agencies.

Michael has managed numerous annexation studies for cities around the region, including Bothell, Enumclaw, Lynnwood, Kirkland and Everett. Michael recently worked with the City of Kirkland assessing the City's competitiveness related to its ability to attract and retain commercial businesses and compete within the region for new commercial development.

Prior to joining BERK in 1992, Michael was a financial analyst with Gannett Fleming. He holds a B.A. in Economics from the University of British Columbia and a Certificate in Commercial Real Estate from the University of Washington. He serves on the Advisory Board for Seattle University's Albers School of Business and Economics.

EDUCATION

• B.A. Economics, University of British Columbia
• Certificate in Commercial Real Estate, University of Washington Extension

RELEVANT PROJECT EXPERIENCE

• City of Kirkland, Tax Burden Analysis. Project Director.
• City of Kirkland, Competitiveness Assessment. Project Manager.
• City of Kirkland, Competitiveness Update. Project Manager.
• City of Kirkland, Potential Local Fiscal Benefits of Redevelopment of Park Place. Project Manager.
• City of Des Moines, Marina Market Analysis. Project Director.
• Port of Seattle, North Bay Industrial Market Analysis and Commercial Market Analysis. Project Manager.
• Project Director. Bellevue Downtown Association (BDA), Fiscal Implications of Downtown Growth. Project Manager.
• City of Tukwila, Strategic Plan. Strategic Advisor on Municipal Finance.
• City of Tukwila, Facilities Needs Assessment. Task Lead.
• City of Tukwila, Fire District Annexation Analyst. Project Manager.
• City of Kent, Cost Efficiencies Study. Project Manager.
• City of Bothell, Annexation Study. Project Director.
• Pierce County, Parks, Recreation, and Open Space Plan. Financial Lead.
• Pierce County, Evaluation of Pierce County Rural Separator Area. Project Director.
• City of Woodinville, Comprehensive Plan Update. Principal-in-Charge.
• City of Anacortes, Analysis of 20-Year City Revenue Requirements. Project Manager.
• City of Burien, Public Safety Service Delivery Analysis. Project Director.
• Port of Douglas County, Capital Facilities Plan and Economic Feasibility Study. Project Director.
• Washington State Department of Transportation Aviation Division, Aviation Economic Impact Study. Project Manager.
• City of Lakewood, Mediating Clear Zone Encroachment through Annexation of Military Installations. Project Director.
KEVIN GIFFORD, AICP

Load Analyst

KEVIN GIFFORD, AICP

Load Analyst

Kevin Gifford is a senior urban planner and GIS analyst with a background in land use, environmental, and community planning. He specializes in assisting local governments with the preparation of Comprehensive Plans, Shoreline Master Program Updates, and development code amendments. He has worked with citizen groups and local governments to develop plans and regulations that can guide future development in a manner that is sustainable and community oriented.

Kevin has experience with development capacity forecasting, as well as evaluation of economic impacts associated with development projects. He has also worked with communities to analyze likely development scenarios resulting from changes in land use policy.

Prior to joining BERK in 2013, Kevin worked as a Planner and GIS Analyst at AHBL and ICF International. Kevin has a Master of Urban Planning, a Bachelor of Environmental Design, cum laude, and a Minor in Business Administration from Texas A&M University.

EDUCATION

- Texas A&M University, Bachelor of Environmental Design, Cum Laude, Minor in Business Administration
- Texas A&M University, Master of Urban Planning

RELEVANT PROJECT EXPERIENCE

- City of Covington, Town Center Infrastructure Study. Planner.
- City of Covington, Northern Gateway Study. Land Use and EIS Support.
- City of Covington, Buildable Lands Reporting. Planner.
- Sound Transit, South Corridor. Economic Impacts Lead.
- City of Sumner, Sumner Meadows Golf Course EIS. Analyst.
- City of Renton, Comprehensive Plan Update — Land Use Element. Planner.
- City of Kirkland, Comprehensive Plan Update EIS. Planner.
- Snohomish County Comprehensive Plan Update EIS. Public Services and EIS Support.
- City of Kirkland, MRM Property SEIS. Land Use and EIS Support.
- City of Seattle, Comprehensive Plan Update EIS. Land Use and EIS Support.
- Island County, Transportation Plan. Land Use Support.
- City of Tukwila, Comprehensive Plan Formatting. Project Manager.
- City of Renton, Comprehensive Plan Update — Utilities Element. Project Manager.
- City of Bremerton and Kitsap County, Garst Creek Watershed Plan, UGA Subarea Plan and Planned Action. Land Use Plan and EIS Support.
- Walla Walla County, Comprehensive Plan Update. Housing Element Lead and EIS Support.
- Kittitas County, 2009 Comprehensive Plan Amendments. GIS Analyst.
- Benton County, Shoreline Management Program. Analyst.
KEVIN RAMSEY  
Market Analyst and Demographer

Kevin is a senior economic and policy analyst with experience managing complex land use, transportation, and environmental planning studies. He has particular experience in using his extensive GIS capabilities in performance measurement, cartographic design, and the development of new spatial analysis tools and methodologies. Kevin’s depth of experience at the local, state, and federal level have given him a deep understanding of how solid research and analysis can be presented in ways that bring clarity to complex problems and inform decisions.

Prior to joining BERK, Kevin worked with U.S. Environmental Protection Agency’s Smart Growth Program. There he provided technical assistance to help localities identify and pursue sustainable community strategies that support their environmental, social, and economic development objectives. He also worked with the U.S. Departments of Transportation and Housing and Urban Development through the Partnership for Sustainable Communities to coordinate federal policies and investments in ways that better support local efforts to pursue sustainable community development. Kevin holds a Masters and PhD in Geography from the University of Washington.

EDUCATION
- Ph.D. Geography, University of Washington
- B.A. Radio, Television, & Film, Northwestern University

RELEVANT PROJECT EXPERIENCE

Work with BERK Consulting
- Whatcom County, 2016 Comprehensive Plan Update. Senior Analyst.
- Chelan County, Volunteer Stewardship White Paper. Senior Analyst.

Work with Federal Government (EPA)
- Sustainable Community Indicator Catalog and interactive web resource.
- General Services Administration sustainable location key performance indicators.
- Modeling the effect of workplace built environment characteristics on employee travel.
- Smart Location Calculator (web tool for estimating worker VMT, greenhouse gas emissions, and mode share for new office facilities).

Publications
- Sustainable Communities: Challenges in Implementing Standardized Performance Measures (2013 TRB Compendium of Papers, contributing author).
- EPA’s Smart Location Database: A National Dataset for Characterizing Location Sustainability and Urban Form (2012 EPA technical report, primary author).
Appendix B: Evidence of Insurance
CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 9/19/2013

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

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

PRODUCER
McDonald Insurance Group, Inc.
620 Kirkland Way Ste 100
PO Box 3089
Kirkland WA 98033-3089

INSURED
Berk & Associates Inc.
2025 First Ave. Suite 800
Seattle WA 98121

COVERAGE
CERTIFICATE NUMBER: 13/14 - GL/AL/SG/Prof

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

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DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

AS EVIDENCE OF INSURANCE

CERTIFICATE HOLDER

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

F. McAllister, Jr. / HHC

The ACORD name and logo are registered marks of ACORD.
City of Bonney Lake
City Council Agenda Bill (AB)

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**Agenda Subject:** Authorization to contract with Berk Consulting for development of the Economic Development Plan and Market Analysis

**Full Title/Motion:**
A Motion Of The City Council Of The City Of Bonney Lake, Pierce County, Washington, To Authorize the contract with Berk Consulting for Economic Development Plan and Market Analysis

**Administrative Recommendation:**

**Background Summary:**
The current economic development plan was adopted on December 13, 2005 and has never been amended or updated. Given the time that has elapsed since the adoption of the current economic development plan, staff proposed that the economic development plan be rewritten in the Bonney Lake 2035 Scope of Work and Public Participation Plan, which was subsequently approved by the City Council pursuant to Resolution 2320. The City Council also approved an amendment to the Biennium Budget authorizing the Community Development Department to spend up to $40,000 on consultants associated with the Comprehensive Plan Update not including the update to the Transportation Element. While staff plans to complete most of the update in house, there are some elements of the update to the economic development plan that need to be completed by a consultant with expertise in market analyses and economic development plans. Specific task to be complete by the consultant include the preparation of an Economic Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, an Economic Development Strategic Action Plan identifying programs and projects to foster economic growth and development in the City, and a Non-Retail Market Analysis for specific industries to determine the viability of each industry within the City.

**Attachments:** Resolution 2393; Contract; Proposal

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**COMMITTEE, BOARD & COMMISSION REVIEW**

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**Consent Agenda:**
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- No: X

**Forwarded to:**

- Council Committee: 
- Chair/Councilmember: Katrina Minton-Davis
- Councilmember: Randy McKibbin
- Tom Watson

**Commission/Board Review:**
- Yes:  
- No: X

**Hearing Examiner Review:**

Rev. January 2014
# Council Action

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<td>(if applicable):</td>
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</tbody>
</table>

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