

CITY OF RANCHO CORDOVA



CITY COUNCIL MEETING Tuesday, December 12, 2023

**5:30 PM – Special Meeting/Work Session
David B. Roberts Council Chambers**

**City Hall
2729 Prospect Park Drive, Rancho Cordova**

**DoubleTree by Hilton Hotel - Lobby
101 South Adams Street
Tallahassee, FL 32301**

Join the Meeting Via Zoom Link:

<https://cityofranhocordova.zoom.us/j/82958241863?pwd=sFMsaZAKVg-tA1ST7tlwD4BkkGwwSA.txX3Qb!WNwQreIFg>

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Instructions to Make Public Comment

Submitting Public Comment via Email

Members of the public who wish to provide public comment via email will need to submit written comments to CityClerk@cityofranhocordova.org no later than 2:00 p.m. on Tuesday, December 12, 2023. Written comments received no later than 2:00 p.m. will be distributed to the Council, filed in the record, and will not be read aloud. All comments submitted later than 2:00 p.m. will be distributed to the Council.

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To make a public comment using the Zoom platform, please use the “raise hand” feature at the bottom center of the screen. Please make sure to enable audio controls once access has been given by the City Clerk’s office to speak. Please wait to be called upon by the City Clerk.

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You can join a Zoom meeting via teleconferencing/audio conferencing using a cell phone or traditional landline phone. To request to make a public comment by phone press *9 to raise your hand. Please wait to be called upon by the City Clerk.

All public comments will be limited to three minutes.

If you have questions related to the City Council Meeting or the use of Zoom, please contact the City Clerk's Office at (916) 851-8720 before Tuesday, December 12, 2023, at 2:00 p.m.

AGENDA

1. SPECIAL MEETING - CALL TO ORDER/ROLL CALL

Council Members Linda Budge, Garrett Gatewood, Siri Pulipati, Donald Terry, and Mayor David Sander

2. PUBLIC COMMENT

At a special meeting, citizens wishing to address the Council for any matter on the agenda may do so at the time the matter is discussed. Under the provisions of the California Government Code, the City Council is prohibited from discussing or taking action on any item not on the agenda.

3. SPECIAL MEETING ITEM

3.1. **Subject:** Economic Development Strategic Plan Proposals.

Recommendation: Receive recommendations from the City Council regarding the selection of the top consulting firms to move forward with the development of the Economic Development Strategic Plan (EDSP).

4. ADJOURNMENT

ADDITIONAL INFORMATION

Special Meetings listed below are subject to change/cancellation without further notice.

Public documents related to items on the open session portion of this agenda, which are distributed to the City Council less than 24 hours prior to the meeting, shall be available for public inspection at the time the documents are distributed to the Council. Documents are available for inspection at the City Clerk's office located in Rancho Cordova City Hall.

The agenda items are accessible on the City's website at www.cityofranhocordova.org on Thursdays or Fridays prior to the Special City Council Meeting.

UPCOMING MEETINGS

December 18, 2023	5:30 PM Regular Meeting
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If you have any technical questions related to the agenda items, please contact City Hall at (916) 851-8700.

In compliance with the Americans with Disabilities Act, if you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in this meeting, please contact the City Clerk's Office at (916) 851-8720 at least 48 hours prior to the meeting.

CERTIFICATION OF POSTING OF AGENDA

I, Stacy Leitner, City Clerk for the City of Rancho Cordova, declare that the foregoing agenda for the December 12, 2023 Special Meeting of the Rancho Cordova City Council was posted and available for review on December 7, 2023, at City Hall of the City of Rancho Cordova, 2729 Prospect Park Drive, Rancho Cordova, California, 95670. The agenda is also available on the city website at www.cityofranhocordova.org.

Signed December 7, 2023, at Rancho Cordova, California.



Stacy Leitner, CMC
City Clerk

MEMORANDUM



ITEM 3.1.

DATE: December 12, 2023
TO: Honorable Mayor and Council Members
FROM: Amanda Norton, Economic Development Manager
SUBJECT: **ECONOMIC DEVELOPMENT STRATEGIC PLAN PROPOSALS**

RECOMMENDATION

Receive recommendations from the City Council regarding the selection of the top consulting firms to move forward with the development of the Economic Development Strategic Plan (EDSP).

RESULT OF RECOMMENDED ACTION

The City staff would draft an agreement and return to the council at the next meeting for approval.

City staff would follow up with the City Council-selected firms and consider the following:

- The firm's experience in developing economic development plans for communities of similar size and demographics.
- The firm's track record of successful community engagement and involvement in the planning process.
- The proposed methodology and approach to developing the EDSP, including timelines and key milestones.
- The overall cost and value of the consulting services offered.

Staff would proceed with contract negotiations and would return to a regularly scheduled City Council meeting for final Council member approval.

BACKGROUND

The Rancho Cordova Economic Development Team has undertaken a rigorous process to select a consulting firm to assist in the development of the Economic Development Strategic Plan (EDSP). A total of 13 proposals were received from qualified consulting firms interested in collaborating with the City on this essential initiative. The proposals were reviewed and evaluated by a dedicated review committee, and after a thorough assessment, four top consulting firms have been shortlisted for further consideration. These firms have been invited to present their qualifications and proposed approach to the City Council, as the EDSP is a year-long project of significant importance to the community.

The EDSP is a critical document that will guide the City of Rancho Cordova's economic development efforts for the next three (3) years. The EDSP would define a clear vision and set of strategies to enhance the City's economic prosperity, promote job growth, attract businesses, and ensure a vibrant and sustainable local economy. Given the complexity and long-term impact of this project, it is imperative that we engage a reputable and experienced consulting firm to assist in its development.

Consultant Selection Process:

1. Request for Proposals (RFP): The City of Rancho Cordova issued an RFP on September 8, 2023, seeking qualified consulting firms to support the development of the EDSP. The RFP outlined the project's scope, objectives, and evaluation criteria.
2. Proposal Evaluation Committee: A committee comprised of City Economic Development staff, City staff members from the Planning Department and Housing Department, and two external Economic Development professionals was formed to evaluate the received proposals. Each proposal was thoroughly reviewed and assessed based on predefined criteria, including the firm's experience, qualifications, relevant past work, approach, and proposed project team.
3. Shortlisting: After a comprehensive review process, the Proposal Evaluation Committee identified four top consulting firms that excelled in the evaluation criteria and demonstrated the capability to undertake this significant project effectively.
4. Invitation to Present: The four shortlisted consulting firms have been invited to present their qualifications, methodology, and approach to the City Council. These presentations will offer an opportunity for City Council members to gain a deeper understanding of each firm's potential contributions to the EDSP.

The purpose of this meeting is to seek recommendations from the City Council regarding the selection of the top consulting firms to move forward with the development of the EDSP.

FISCAL IMPACT AND FUNDING SOURCE

This project has been budgeted for from the Economic Development General Fund Budget.

ATTACHMENT(S)

1. Rancho Cordova Strategic Plan RFP
2. Business Street Proposal
3. Fourth Economy Proposal
4. Natelson Dale Group Proposal
5. TIP Proposal
6. Economic Development Strategic Plan PPT

**City of Rancho Cordova
Economic Development Department**



REQUEST FOR PROPOSALS

For

**Economic Development Strategic Plan and
Implementation Plan**

Release Date: September 8, 2023

Submittal Deadline: October 6, 2023 at 4:00 PM (Pacific)

**City of Rancho Cordova
2729 Prospect Park Drive
Rancho Cordova, CA 95670
(916) 851-8700**

REQUEST FOR PROPOSALS
SUMMARY SHEET

1. Purpose of RFP: The City of Rancho Cordova is requesting proposals from consultants to produce an Economic Development Strategic Plan and Implementation Plan for the City. The City seeks responses from consultants demonstrating successful experience in a wide variety of economic development consulting services. Applicants should articulate a planning methodology that will lead to an actionable economic development strategy comprised of key objectives and the actions needed to achieve them. The consultant will be expected to produce a written report and actionable strategy that meets the needs of the City for the next three (3) years.

2. Project Manager & RFP Contact: Amanda Norton
Economic Development Manager
City of Rancho Cordova
Economic Development Department
2729 Prospect Park Drive
Rancho Cordova, CA 95670
Telephone (916) 851-8783
anorton@cityofranhocordova.org

3. Last Day to Submit Questions September 28, 2023 @ 5:00 PM

4. Proposal Due Date: October 6, 2023 at **4:00 PM (Pacific)**

5. Selection Method: Proposal and Interview

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INTRODUCTION AND PROJECT BACKGROUND

The City of Rancho Cordova, Economic Development Department (City) is soliciting proposals for professional services for a three (3) year City wide Economic Development Strategic Plan and Implementation Plan.

The proposal should include information demonstrating Consultant's understanding of the project, expertise and past performance conducting similar projects and project team as outlined in this RFP. Qualified consultant firms or teams should demonstrate successful experience in a wide variety of economic development consulting services. The Consultant proposal will be evaluated and ranked in accordance with the criteria set forth in Section 2 of the RFP. After evaluations are conducted by the City, the top three (3) proposers may be invited to an interview to present on their detailed scope of work, cost proposal and schedule for the Project.

The City of Rancho Cordova was incorporated in 2003. With a current population of 81,674, the City is expanding in both residential and nonresidential development each year. The City is unique in its blend of residential, commercial, and industrial areas. Rancho Cordova contains one of the region's largest employment centers, second to Downtown Sacramento, with over 65,000 jobs in a wide range of industries. The City's economy weathered the COVID pandemic well, but the large, master plan office park may need to be reimagined due to the changes in industry sectors looking for space and work from home policies. COVID also impacted the industrial and retail sectors of our economy.

1.0 RFP GENERAL INFORMATION AND SCHEDULE

GENERAL INFORMATION

The City of Rancho Cordova is requesting proposals from consultants to produce an Economic Development Strategic Plan and Implementation Plan for the City. The City seeks responses from consultants demonstrating successful experience in a wide variety of economic development consulting services. Applicants should articulate a planning methodology that will lead to an actionable economic development strategy comprised of key objectives and the actions needed to achieve them. The consultant will be expected to produce a written report and actionable strategy that meets the needs of the City for the next three (3) years.

- **Format:** All interested parties are required to submit a proposal in accordance with the conditions and within the date outlined in this RFP. Firms to respond to all information and completion of forms contained in this Request for Proposal. A qualifying response must address all items. Brochures and advertisement will not be conserved a complete reply to requests for information and will not be accepted as such. Proposer is solely responsible for accuracy and completeness of RFP response. Responses considered incomplete may be rejected.
- **Alteration of Proposed Text:** The original text of the RFP document, as well as any attachments, amendments, or other official correspondence related to this RFP document, may not be manually, electronically, or otherwise

altered by proposer or proposer's agent(s). Any response containing altered, deleted, additional or otherwise non-original text will be disqualified.

- Preparation of Response: All responses must be signed by an authorized officer or employee of the responder. Proposals must be submitted prior to the response deadline via e-mail (Amanda Norton anorton@cityofranchocordova.org). Responses delivered by hand, fax, telephone, or any postal carrier will not be accepted. It is the proposer's responsibility to ensure that the file is not corrupted or damaged. If the City is unable to open an attachment because it is damaged, corrupt, infected, etc., it may disqualify proposer's submission.

Inquiries regarding this RFP can be directed to the contact person named below. Do not contact any other City staff. Information provided by others than the below contact should be considered invalid and proposals which are submitted in accordance with such information may be declared non-responsive.

Direct all inquiries regarding this RFQ in writing to:

City of Rancho Cordova
Attn: Amanda Norton
Economic Development Department
2729 Prospect Park Drive
Rancho Cordova, CA 95670
Phone: (916) 851-8783
Email: anorton@cityofranchocordova.org

In the event that it becomes necessary to revise any part of this RFP, a written addendum will be issued. Any amendment to this RFP is valid only if in writing and issued by the City of Rancho Cordova Economic Development.

Verbal conversations or agreements with any officer, agent, or employee of the City that modify any terms or obligations of this RFP are invalid.

Submittals received after the time and date specified below will be considered nonresponsive.

Any submittals received prior to the time and date specified below may be withdrawn or modified by written request of the consultant to Amanda Norton by email at anorton@cityofranchocordova.org. To be considered, however, the modified submittal must be received within the timeframe shown below.

This RFP does not commit the City of Rancho Cordova to award a contract, to pay any costs incurred in the preparation of the proposal for this request, or to procure, or contract for services. The City reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified Consultant, or to modify or cancel in part or in its entirety the RFP if it is in the best interests of City to do so.

The prospective consultant is advised that should this Request for Proposals result in recommendation for award of a contract, the contract

will not be in force until it is approved by the Rancho Cordova City Council and fully executed by the City. An example of the standard consulting contract is included as **Attachment A**.

SCHEDULE

The City's **TENTATIVE SCHEDULE** is as follows:

RFQ Issued.....	September 11, 2023
Last Day to Submit Questions.....	September 28, 2023 @ 5:00 PM
<u>Proposal Due Date.....</u>	<u>October 6, 2023 @ 4:00 PM</u>
Evaluation of Proposals	October 9 th – 13 th 2023
Interviews (If Necessary)	Week of October 16 th
Final Consultant Selection	Week of October 16 th
Council Approval Date.....	November/December
Start of Work.....	December/January

2.0 BASIS FOR AWARD

This proposal award will be determined by factors other than price alone. The City's sole purpose in the evaluation process is to determine from amount the responses received which one is best suited to meet the City's needs. Any final analysis or weighted point score does not imply that one proposal is superior to another, but simply that in our judgement the proposal(s) we select offer(s) the best overall solution for our current and anticipated needs. The City reserves the right to make modifications in any scoring and/or weight structure prior to the evaluation of responses.

SCORING CRITERIA ELIGIBILITY

To be considered, consultants submitting proposals must demonstrate successful experience in providing economic development consulting services. Experience may include but is not limited to:

- Work with municipalities on complex economic development projects.
- Expertise in applying an equity lens to economic development projects, including but not limited to, demonstrated expertise in community engagement with underserved and underinvested communities.
- Research and analysis of industries, markets, and communities.
- Expertise in development Economic Development Strategic Plans and Implementation Plans for communities of similar size and characteristics to the City.
- Portfolio of municipal-related clients and agencies, includes those similar to the size and complexity of the City.
- Knowledge of California regulatory framework.

EVALUATION CRITERIA

The City will evaluate and consider proposals based on, but not limited to the following:

- Accuracy of proposal submission.
- History, background, staffing, resources, and capabilities to complete this Project.
- Proposed work plan methodology and project schedule.
- Proposed final product.
- Proposed project team personnel and responsibilities.
- Personnel and subconsultants' background, qualifications, demonstrated creativity, and experience in the economic development industry.
- Experience and demonstrated expertise in developing an Economic Development Strategic Plan and Implementation Plan for similar communities.
- Experience with underserved communities, particularly as it related to designing and developing an Economic Development Strategic Plan and Implementation Plan.
- References and relevant samples provided for work of a similar scope.
- Project cost proposal and per hour rate for staff/subconsultants.

POINT ALLOCATION

- Cover letter – 5 points
- Relevant experience and references -15 points
- Work plan – 35 points
- Project schedule – 10 points
- Deliverable – 15 points
- Project team – 10 points
- Cost proposal – 10 points

EVALUATION AND RANKING

A review panel that may include City staff and subject-matter experts will review and rank all complete and eligible proposals. The City makes no commitment to any respondent beyond consideration of its written response.

INTERVIEWS

The City may conduct interviews with one or more consultants as part of the review process. The City reserves the right to select a consultant without interviews based solely on the information contained in the proposal.

CONTRACT OFFER

The selection of the consultant and the execution of a contract, while anticipated, are not guaranteed by the City. The City reserves the right to determine which proposal is in the City's best interest and to award the contract on that basis, to reject any and all proposals or portions thereof, to waive any irregularities of any proposal, and to negotiate with any proposer (after all proposals are opened) if such is deemed in the best interest of the City.

3.0 Scope of Work

The following Scope of Work is provided as a general guide to the services the City anticipates from the consultant and is not a complete listing of all services that may be required or desired. The Scope of Work is intended develop a clear and inspiring vision for Rancho Cordova's economic future. The Scope of Work will cumulate in an Economic Development Strategic Plan and Implementation Plan that furthers strong and inclusive economic growth in the City for the next three (3) years.

The consultant's overall responsibility will be to produce a final, actionable Economic Development Strategic Plan and Implementation Plan. The final product should contain actionable strategies to drive growth and prosperity in Rancho Cordova, as well as, a detailed roadmap outlining the step-by-step implementation of the Strategic Plan.

The consultant will also be expected to conduct the research and design of the plan including thorough market research, community input, and other data gathering. To this end, the consultant will be expected to provide meeting facilitation services and supporting materials for workshops and community outreach.

Consultant is encouraged to recommend additional or modified tasks deemed vital to the Project's success and the City may also include additional related tasks at its discretion. The consultant shall provide professional services including, but not limited to, the following tasks:

Project Overview Meetings

Conduct working meetings and subsequent interviews with Economic Development, other City Departments, and hold a City Council Work Session to define the scope of project, recommendations, and intended outcomes.

Organizational Analysis

Analyze current federal, statewide and regional economic development strategies, initiatives, and programs including, but not limited to, the [Sacramento Region Community Economic Resilience Fund \(CERF\)](#), [Greater Sacramento Region Prosperity Strategy](#), and [Greater Sacramento Economic Council](#).

Citywide Demographic and Economic Analysis

Perform qualitative and quantitative research on the City's demographic and economic outlook. Analyze key City demographic, socioeconomic, labor and workforce, educational and employment development, should include an assessment of underserved communities.

Based on the qualitative and quantitative research noted above, assess the City's present and future national/regional competitive outlook and standing, against similar markets. Assessment should include an analysis of how these trends impact underserved communities.

Analyze local, national, and international economic development programs that serve similar communities.

Target Industry Analysis

Provide a current industry snapshot and their market locations for the City. Identify and prioritize key sectors with potential for growth and expansion, ensuring a diverse and resilient economy.

Stakeholder and Public Outreach

- **Identify stakeholders.** Stakeholders should include, but not be limited to, members of the public, non-profits, government agencies, business leaders, major real estate brokers, developers, educational institutions and utility providers. Stakeholders should represent a broad range of voices within the City. The consultant must work with the Economic Development Department to determine final list of stakeholders.
- **Conduct active community engagement.** Develop content and facilitate engagement to determine current key issues most affecting communities throughout the City. The points of engagement must include a combination of interviews, workshops, social media communication tools, and/or on-line public opinion instruments. The consultant should conduct a minimum of 3 community meetings. Content and engagement strategies should ensure an inclusive process, including thorough strategies that ensure language, location, and other accessibility strategies.
- **Stakeholder analysis.** Develop stakeholder analysis using findings from community engagement actions. Analysis should outline stakeholder concerns, opportunities for future participation in economic development activities, and future needs of stakeholders based on distinct regional and industry profiles.
- **Public Workshop.** Conduct a City Council Work Session to discuss findings from community meetings. Workshop should include a presentation and discussion of findings from the stakeholder analysis. The workshop should also include an opportunity for feedback and engagement with the City Council Members and community.

The City Economic Development Manager must be kept abreast of outreach to outside agencies, prior to any meeting with an outside agency or organization.

Business Attraction, Retention and Expansion Efforts & Strategies Analysis

Propose innovative initiatives that will attract new businesses and investments to the City, fostering job creation and economic opportunities for residents.

Identify and prioritize key sectors with potential for growth and expansion, ensuring a diverse and resilient economy. Identify development opportunities and strategies to establish the City as a leading destination for relocations and expansions for identified key sectors. Include an equity component noting how these strategies can be

implemented to support equitable economic development for underserved and underinvested communities.

Conduct a recruitment and retention analysis and make recommendations on marketing practices and tools, brand development, and programs.

Include a review of current incentives and related policies. Review should include recommendations for how to best align incentives with economic development goals and objectives in order to increase the City's competitive position.

Written Economic Development Strategic Plan, Actionable Implementation Plan and Creation of Other Supporting Items

The Economic Development Strategic Plan should establish measurable targets and key performance indicators to assess the success of the proposed strategies over the three-year period, as well as, an Implementation plan with step-by-step actions to achieve the outlined indicators and metrics to evaluate success over the course of the Plan's implementation.

Incorporate the results of previous tasks into a document framework that will guide the City's economic development efforts through the next three (3) years.

Prepare and present a PowerPoint presentation of the proposed Economic Development Strategic Plan and Implementation Plan for the City Council Members' consideration and approval at a public meeting.

Prepare additional collateral as appropriate to ensure the Economic Development Strategic Plan and Implementation Plan is communicated in an actionable and accessible manner. Additional collateral may include, but is not limited to, toolkits, timelines, workplans, and community-focused summaries.

The final Economic Development Strategic Plan report should provide analysis, recommendations, and key objectives:

- Identify primary opportunities and challenges.
- Identify targeted industries.
- Identify major industries for business attraction and retention efforts.
- Identify specific policies, programs and initiatives for obtaining economic development objectives including, but not limited to, strategies for job incentive programs.
- Provide primary goals and objectives for the Economic Development Department and key stakeholders for the next 3 years.

The Implementation Plan should outline the specific actions, in a phased approach, that will be required to achieve the objectives in the Economic Development Strategic Plan report:

- Identify specific action items to be implemented for achieving the corresponding strategic goals and objectives over the next three (3) years.
- Identify an implementation timeline, prioritizing actions where appropriate, and articulating the level of effort and length of time anticipated for actions.
- Identify who in the City government and/or community will be responsible for each item as well as any supporting agencies and partners.
- Identify metrics for the City to measure success to ensure outcomes are achieved.
- Include budget estimates for each item, as applicable.

4.0 PREPARATION PROPOSAL NARRATIVE – REQUIRED CONTENT

Each response to this RFP shall include the information described in this section. Failure to include all the elements specified may be cause for rejection. Additional information may be provided but should be succinct and relevant to the goals of this RFP. The document shall be organized as follows:

PROPOSAL NARRATIVE

Proposals documents must be double spaced with one-inch margins and must be drafted using not less than 11-point font. Proposals should not exceed 15 single-sided pages. Applicants should designate an authorized representative with one single organization as the project lead.

The primary application package must include all of the following components:

Cover Letter (5 points): Include a cover letter with organization name, address, phone number, project contact name, project contact e-mail, an expression of interest in the project and confirmation that sufficient resources in personnel, equipment, and time are available and can be committed to this project. A brief narrative of the Consultants understanding of the Scope of Work and how the firm will contribute to success. Describe the type of organization that is responding (e.g. sole proprietorship, partnership, corporation, joint venture).

The Cover Letter must be signed by an officer empowered by the Consultant to sign such material and thereby commit the Consultant to the obligations contained in the RFP response. **Further, the signing and submission of a response shall indicate the intention of the Consultant to adhere to the provisions described in this RFP and a commitment to enter into a binding contract.**

Relevant Experience and References (15 points):

Explain your experience providing economic development consulting services.

Identify and describe three (3) projects of a similar nature, with which consultant has had direct experience. Be specific on Consultant's involvement in the project and why the referenced projects are similar to this project. Include outcomes of the projects including any related to supporting economic development outcomes for underserved and underinvested communities. Provide website links to completed Economic Development Strategic Plan and Implementation Plan of a similar nature/scope when appropriate. Provide the name, title, address, e-mail and telephone number each of the projects the City may contact. Note that the City reserves the right to contact references not provided in the submittal.

Consultants are encouraged to described and/or outline the complexities of the project and the firm's project management approach on the related projects.

Work Plan (35 points):

Explain how you will produce the Economic Development Strategic Plan and Implementation Plan. Include detailed and specific tasks that cover all activities needed to produce the Economic Development Strategic Plan and Implementation Plan, from the beginning of the project to delivery of the final product. Your answer should address each component noted in *Scope of Work* section of this RFP. Note responsible parties for all tasks. Note any methodology or strategies that will be employed to ensure successful completion of each work plan component.

Explain your strategy to ensure strong community engagement and partnerships. Describe your approach to community and County engagement for this project. Describe how you will ensure community input is reflective of the entire City including underserved businesses and communities. Please refer to "*Stakeholder and Public Outreach*" section under "*Scope of Work*" of this RFP for specific guidelines. Please note any community partners that will be involved, including their specific role.

Project Schedule (10 points): Provide project schedule to accommodate an Economic Development Strategic Plan and Implementation Plan showing key task target dates (including community meetings, public meetings and staff team meetings) and estimated task duration. The project schedule should include options for phased deliverables throughout the development of the Economic Development Strategic Plan and Implementation Plan.

Deliverables (15 points): Provide a description of your proposed deliverables. Please note that the final deliverables should include a final Economic Development Strategic Plan Report, Implementation Plan, and summary presentation, at a minimum. Additional collateral may be proposed to ensure the Economic Development Strategic Plan outcomes are successful and can be communicated effectively to stakeholders including, but not limited to, marketing collateral, toolkits, community-focused summaries, and work plans.

Project Team (10 points): Identify and provide a detailed resume for the proposed project manager. Include full work history, special qualifications and demonstrated experience. Provide resumes for each member of staff or team proposed to be assigned to the project, including any subcontractors. Describe the firm's or team's management

structure for the project with clear identification of the specific services each staff assigned to this project will provide. List any subconsultant(s) that your firm proposes to utilize on this project. Include an organization chart of the proposed staff and subconsultant(s) to be assigned to this project.

Once a Consultant has been selected, replacement of designated key personnel will not be permitted without written consent by the City.

(Resumes are to be included in an Appendix and are not part of the 15-page limit).

Cost Proposal (10 points): The City has not determined a budget for this project. Please create a cost proposal that details the fee structure for the services proposed in response to this RFP. Include the hourly rates for each member of staff or team proposed to be assigned to the project, including any subcontractors. Include any travel, supplies, and any other costs associated with the project. Clearly identify any overhead multipliers or other fees not covered by the stated hourly rates, if applicable. Fees will be paid on a cost-reimbursement basis for time and service.

5.0 SUBMITTAL INSTRUCTIONS

Submit **one (1) digital copy via email, or shared folder)** of your Proposal not later than the time and date indicated on the cover page of this RFP.

Proposals must be submitted **ONLY** to:

Amanda Norton
Economic Development Manager
Rancho Cordova City Hall
anorton@cityofranhocordova.org

Proposals submitted to a location other than the above will not be considered duly delivered or timely. The City of Rancho Cordova shall not be responsible for re-routing Proposals delivered to a person or location other than that specified above.

Late submittals will not be accepted or considered.

All submittals, whether selected or rejected, shall become the property of the City of Rancho Cordova and will not be returned.

All costs associated with RFP preparation shall be borne by the Proposer.

6.0 AGREEMENT

It is the intent of the City to award a contract in late 2023 with an estimated overall term of twelve (12) months.

After selection of a consultant, the City will then enter into negotiations as to the term of the contract, all aspects of services, and the compensation to be paid to the consultant. In the event the negotiations between the consultant selected and the City cannot be

completed as a result of an inability to reach agreement on the fee for services or the scope of work to be performed, then at the option of the City, the contract may be awarded to another consultant. The selected Consultant shall execute an agreement with the City in a form approved by City Council.

The selected consultant will be expected to manage and control costs and resources, and complete work in adherence to the agreed upon Project schedule and will assign a Project Manager who will act as the City's primary contact and will be entirely responsible for project management activities throughout the life of the Project (including subconsultant work, if applicable).

7.0 REPORTING

The Economic Development Department will share a reporting and invoicing schedule with the awarded entity post-award. Regular reporting will be required and will include narrative and financial reporting updates and meetings with the Economic Development Department. A final project report will be required along with the final Economic Development Strategic Plan and Implementation Plan. The final report will be a brief description of the work and methodology. It should also provide details on the community members and partners engaged to complete the Strategic Plan and Implementation Plan, including the number of small businesses by owner demographic and community members by demographic (women, veteran-owned, rural, black-owned, Latino-owned, Asian-owned, Native American owned), as well as a list of City Departments, community partners and their constituency demographics, and summary of other data sources reviewed and collected.

8.0 GENERAL TERMS & CONDITIONS

STANDARD CONTRACT

If a contract is recommended for award, the selected Consultant will be required to execute a Professional Services Agreement, a sample of which is included as **Attachment A**. Proposers are advised to carefully review the attached contract. Any proposed exceptions, alterations, or amendments shall be specified in your submittal, the nature of which may affect the evaluation of your submittal and the perceived ability to successfully award a contract to your firm/individual.

INDEPENDENT CONTRACTOR

At all times the Consultant shall represent himself/herself to be an independent contractor offering such services to the general public and shall not represent himself/herself, or his/her employees, to be an employee of the City of Rancho Cordova. Therefore, the Consultant shall assume all legal and financial responsibility for taxes, FICA, employee fringe benefits, workers compensation, employee insurance, minimum wage requirements, overtime, etc., and agrees to indemnify, save, and hold the City of Rancho Cordova, its officers, agents, and employees, harmless from and against,

any and all loss, cost (including attorney fees), and damage of any kind related to such matters.

OWNERSHIP OF INFORMATION

All reports, documentation, and material developed or acquired by the Consultant as a direct requirement specified herein shall become the property of the City of Rancho Cordova. The Consultant shall agree and understand that all discussions with the Consultant and all information gained by the Consultant as a result of the Consultant's performance under the contract, shall be confidential and that no reports, documentation, or material prepared as required by the contract shall be released to the public without the prior written consent of the City of Rancho Cordova.

CONFLICT OF INTEREST

The Consultant shall warrant that no official or employee of the City has an interest, has been employed or retained to solicit or aid in the procuring of the resulting contract, nor that any such person will be employed in the performance of such contract without immediate divulgence of such fact to the City.

NON-COLLUSION

Consultants submitting Proposals shall warrant that their offer is made without any previous understanding, agreement or connection with any person, firm or corporation submitting a separate Proposal for the same project and is in all respects fair, without outside control, collusion, fraud or otherwise illegal action. This condition shall not apply to Proposals which are submitted by firms who have partnered with others to submit a cooperative Proposal that clearly identifies a primary contractor and the associated sub-contractors.

INDEMNIFICATION & INSURANCE REQUIREMENTS

Consultant shall comply with the City's standard indemnification and insurance requirements as provided in the sample contract, **Attachment A**.

**ATTACHMENT A - SAMPLE PROFESSIONAL SERVICES
AGREEMENT****PROFESSIONAL SERVICES AGREEMENT BETWEEN
THE CITY OF RANCHO CORDOVA AND
XXX**

THIS AGREEMENT for professional services is made by and between the City of Rancho Cordova, a California municipal corporation ("City"), and _____, a _____ ("Professional") as of _____, 20XX.

Section 1. SERVICES. Subject to the terms and conditions set forth in this Agreement, Professional shall provide to City the services described in the Scope of Work attached as Exhibit A at the time and place and in the manner specified therein. In the event of a conflict or inconsistency between the terms of this Agreement and Exhibit A, the Agreement shall prevail.

- 1.1 **Term of Services.** The term of this Agreement shall begin on the date first noted above and shall end on _____, the date of completion specified in Exhibit A. Professional shall complete the work described in Exhibit A prior to that date, unless the term of the Agreement is otherwise terminated or extended, as provided for in Section 8. The time provided to Professional to complete the services required by this Agreement shall not affect the City's right to terminate the Agreement, as provided for in Section 8.
- 1.2 **Standard of Performance.** Professional shall perform all services required pursuant to this Agreement in the manner and according to the standards observed by a competent practitioner of the profession in which Professional is engaged in the geographical area in which Professional practices its profession. Professional shall prepare all work products required by this Agreement in a substantial, first-class manner and shall conform to the standards of quality normally observed by a person practicing in Professional's profession.
- 1.3 **Assignment of Personnel.** Professional shall assign only competent personnel to perform services pursuant to this Agreement. In the event that City, in its sole discretion, at any time during the term of this Agreement, desires the reassignment of any such persons, Professional shall, immediately upon receiving notice from City of such desire of City, reassign such person or persons.
- 1.4 **Time.** Professional shall devote such time to the performance of services pursuant to this Agreement as may be reasonably necessary to meet the standard of performance provided in Section 1.2 above and to satisfy Professional's obligations hereunder.

Section 2. COMPENSATION. City hereby agrees to pay Professional a sum not to exceed _____, notwithstanding any contrary indications that may be contained in Professional's proposal, for services to be performed and reimbursable costs incurred under this Agreement. In the event

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of a conflict between this Agreement and Professional's proposal, attached as Exhibit B, regarding the amount of compensation, the Agreement shall prevail. City shall pay Professional for services rendered pursuant to this Agreement at the time and in the manner set forth herein. The payments specified below shall be the only payments from City to Professional for services rendered pursuant to this Agreement. Professional shall submit all invoices to City in the manner specified herein. Except as specifically authorized by City, Professional shall not bill City for duplicate services performed by more than one person.

Professional and City acknowledge and agree that compensation paid by City to Professional under this Agreement is based upon Professional's estimated costs of providing the services required hereunder, including salaries and benefits of employees and subcontractors of Professional. Consequently, the parties further agree that compensation hereunder is intended to include the costs of contributions to any pensions and/or annuities to which Professional and its employees, agents, and subcontractors may be eligible. City therefore has no responsibility for such contributions beyond compensation required under this Agreement.

2.1 Invoices. Professional shall submit invoices, not more often than once a month during the term of this Agreement, based on the cost for services performed and reimbursable costs incurred prior to the invoice date. Invoices shall contain the following information:

- Serial identifications of progress bills; i.e., Progress Bill No. 1 for the first invoice, etc.;
- The beginning and ending dates of the billing period;
- A Task Summary containing the original contract amount, the amount of prior billings, the total due this period, the balance available under the Agreement, and the percentage of completion;
- At City's option, for each work item in each task, a copy of the applicable time entries or time sheets shall be submitted showing the name of the person doing the work, the hours spent by each person, a brief description of the work, and each reimbursable expense;
- The total number of hours of work performed under the Agreement by Professional and each employee, agent, and subcontractor of Professional performing services hereunder, as well as a separate notice when the total number of hours of work by Professional and any individual employee, agent, or subcontractor of Professional reaches or exceeds 800 hours, which shall include an estimate of the time necessary to complete the work described in Exhibit A;
- The Professional's signature.

2.2 Monthly Payment. City shall make monthly payments, based on invoices received, for services satisfactorily performed, and for authorized reimbursable costs incurred. City shall have thirty (30) days from the receipt of an invoice that complies with all of the requirements above to pay Professional.

- 2.3 Final Payment.** City shall make the final payment within sixty (60) days after completion of the services and submittal to City of a final invoice, if all services required have been satisfactorily performed.
- 2.4 Total Payment.** City shall pay for the services to be rendered by Professional pursuant to this Agreement. City shall not pay any additional sum for any expense or cost whatsoever incurred by Professional in rendering services pursuant to this Agreement. City shall make no payment for any extra, further, or additional service pursuant to this Agreement.
- In no event shall Professional submit any invoice for an amount in excess of the maximum amount of compensation provided above either for a task or for the entire Agreement, unless the Agreement is modified prior to the submission of such an invoice by a properly executed change order or amendment.
- 2.5 Hourly Fees.** Fees for work performed by Professional on an hourly basis shall not exceed the amounts shown on the fee schedule set forth in Exhibit B.
- 2.6 Reimbursable Expenses.** Reimbursable expenses, if any, are set forth in Exhibit B, and shall not exceed _____ (\$_____). Expenses not listed in Exhibit B are not chargeable to City. Reimbursable expenses are included in the total amount of compensation provided under this Agreement that shall not be exceeded.
- 2.7 Payment of Taxes.** Professional is solely responsible for the payment of employment taxes incurred under this Agreement and any similar federal or state taxes.
- 2.8 Payment upon Termination.** In the event that the City or Professional terminates this Agreement pursuant to Section 8, the City shall compensate the Professional for all outstanding costs and reimbursable expenses incurred for work satisfactorily completed as of the date of written notice of termination. Professional shall maintain adequate logs and timesheets in order to verify costs incurred to that date.
- 2.9 Authorization to Perform Services.** The Professional is not authorized to perform any services or incur any costs whatsoever under the terms of this Agreement until receipt of authorization from the Contract Administrator.

Section 3. FACILITIES AND EQUIPMENT. Except as set forth herein, Professional shall, at its sole cost and expense, provide all facilities and equipment that may be necessary to perform the services required by this Agreement. City shall make available to Professional only the facilities and equipment listed in this section, and only under the terms and conditions set forth herein.

City shall furnish physical facilities such as desks, filing cabinets, and conference space, as may be reasonably necessary for Professional's use while consulting with City employees and reviewing records and the information in possession of the City. The location, quantity, and time of furnishing those facilities shall be in the sole discretion of City. In no event shall City be obligated to furnish any facility that may

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involve incurring any direct expense, including but not limited to computer, long-distance telephone or other communication charges, vehicles, and reproduction facilities.

Section 4. INSURANCE REQUIREMENTS. Before beginning any work under this Agreement, Professional, at its own cost and expense, shall procure "occurrence coverage" insurance against claims for injuries to persons or damages to property that may arise from or in connection with the performance of the work hereunder by the Professional and its agents, representatives, employees, and subcontractors. Professional shall provide proof satisfactory to City of such insurance that meets the requirements of this section and under forms of insurance satisfactory in all respects to the City. Professional shall maintain the insurance policies required by this section throughout the term of this Agreement. The cost of such insurance shall be included in the Professional's bid. Professional shall not allow any subcontractor to commence work on any subcontract until Professional has obtained all insurance required herein for the subcontractor(s) and provided evidence thereof to City. Verification of the required insurance shall be submitted and made part of this Agreement prior to execution. Professional shall maintain all required insurance listed herein for the duration of this Agreement.

- 4.1 Workers' Compensation.** Professional shall, at its sole cost and expense, maintain Statutory Workers' Compensation Insurance and Employer's Liability Insurance for any and all persons employed directly or indirectly by Professional. The Statutory Workers' Compensation Insurance and Employer's Liability Insurance shall be provided with limits of not less than ONE MILLION DOLLARS (\$1,000,000.00) per accident. In the alternative, Professional may rely on a self-insurance program to meet those requirements, but only if the program of self-insurance complies fully with the provisions of the California Labor Code. Determination of whether a self-insurance program meets the standards of the Labor Code shall be solely in the discretion of the Contract Administrator. The insurer, if insurance is provided, or the Professional, if a program of self-insurance is provided, shall waive all rights of subrogation against the City and its officers, officials, employees, and volunteers for loss arising from work performed under this Agreement.

An endorsement shall state that coverage shall not be canceled except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the City. Professional shall notify City within fourteen (14) days of notification from Professional's insurer if such coverage is suspended, voided or reduced in coverage or in limits.

The requirement to maintain Statutory Worker's Compensation and Employer's Liability Insurance may be waived by the City upon written verification that Professional does not have any employees.

4.2 Commercial General and Automobile Liability Insurance.

- 4.2.1 General requirements.** Professional, at its own cost and expense, shall maintain commercial general liability insurance for the term of this Agreement in an amount

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not less than TWO MILLION DOLLARS (\$2,000,000.00) and automobile liability insurance for the term of this Agreement in an amount not less than ONE MILLION DOLLARS (\$1,000,000.00). The commercial general liability and automobile liability insurance shall be per occurrence, combined single limit coverage for risks associated with the work contemplated by this Agreement. If a commercial general liability insurance or an automobile liability form or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the work to be performed under this Agreement or the general aggregate limit shall be at least twice the required occurrence limit. Such coverage shall include but shall not be limited to, protection against claims arising from bodily and personal injury, including death resulting therefrom, and damage to property resulting from activities contemplated under this Agreement, including the use of owned and non-owned automobiles.

4.2.2 Minimum scope of coverage. Commercial general liability coverage shall be at least as broad as Insurance Services Office Commercial General Liability occurrence form CG 0001 (most recent edition) covering comprehensive General Liability on an "occurrence" basis. Automobile coverage shall be at least as broad as Insurance Services Office Automobile Liability form CA 0001 (most recent edition), Code 1 (any auto). No endorsement shall be attached limiting the coverage.

4.2.3 Additional requirements. Each of the following shall be included in the insurance coverage or added as an endorsement to the policy:

- a. City and its officers, employees, agents, and volunteers shall be covered as additional insureds with respect to each of the following: liability arising out of activities performed by or on behalf of Professional, including the insured's general supervision of Professional; products and completed operations of Professional; premises owned, occupied, or used by Professional; and automobiles owned, leased, or used by the Professional. The coverage shall contain no special limitations on the scope of protection afforded to City or its officers, employees, agents, or volunteers.
- b. The insurance shall cover on an occurrence or an accident basis, and not on a claims-made basis.
- c. An endorsement must state that coverage is primary insurance with respect to the City and its officers, officials, employees and volunteers, and that no insurance or self-insurance maintained by the City shall be called upon to contribute to a loss under the coverage.

- d. Any failure of Professional to comply with reporting provisions of the policy shall not affect coverage provided to City and its officers, employees, agents, and volunteers.
- e. An endorsement shall state that coverage shall not be canceled except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the City. Professional shall notify City within fourteen (14) days of notification from Professional's insurer if such coverage is suspended, voided or reduced in coverage or in limits.

4.3 Professional Liability Insurance. Professional, at its own cost and expense, shall maintain for the period covered by this Agreement professional liability insurance for licensed professionals performing work pursuant to this Agreement in an amount not less than TWO MILLION DOLLARS (\$2,000,000) covering the licensed professionals' errors and omissions.

4.3.1 Any deductible or self-insured retention shall not exceed \$150,000 per claim.

4.3.2 An endorsement shall state that coverage shall not be suspended, voided, canceled by either party, or reduced in coverage or in limits, except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the City.

4.3.3 The following provisions shall apply if the professional liability coverages are written on a claims-made form:

- a. The retroactive date of the policy must be shown and must be before the date of the Agreement.
- b. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the Agreement or the work, so long as commercially available at reasonable rates.
- c. If coverage is canceled or not renewed and it is not replaced with another claims-made policy form with a retroactive date that precedes the date of this Agreement, Professional must provide extended reporting coverage for a minimum of five (5) years after completion of the Agreement or the work. The City shall have the right to exercise, at the Professional's sole cost and expense, any extended reporting provisions of the policy, if the Professional cancels or does not renew the coverage.
- d. A copy of the claim reporting requirements must be submitted to the City prior to the commencement of any work under this Agreement.

4.4 All Policies Requirements.

- 4.4.1 Acceptability of insurers.** All insurance required by this section is to be placed with insurers with a Bests' rating of no less than A:VII.
- 4.4.2 Verification of coverage.** Prior to beginning any work under this Agreement, Professional shall furnish City with certificates of insurance and with original endorsements effecting coverage required herein. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The City reserves the right to require complete, certified copies of all required insurance policies, at any time.
- 4.4.3 Subcontractors.** Professional shall include all subcontractors as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.
- 4.4.4 Deductibles and Self-Insured Retentions.** Professional shall disclose to and obtain the approval of City for the self-insured retentions and deductibles before beginning any of the services or work called for by any term of this Agreement.

During the period covered by this Agreement, only upon the prior express written authorization of Contract Administrator, Professional may increase such deductibles or self-insured retentions with respect to City, its officers, employees, agents, and volunteers. The Contract Administrator may condition approval of an increase in deductible or self-insured retention levels with a requirement that Professional procure a bond, guaranteeing payment of losses and related investigations, claim administration, and defense expenses that is satisfactory in all respects to each of them.

- 4.4.5 Waiver of Subrogation.** Professional hereby agrees to waive subrogation which any insurer or contractor may require from vendor by virtue of the payment of any loss. Consultant agrees to obtain any endorsements that may be necessary to effect this waiver of subrogation. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the entity for all work performed by the Professional, its employees, agents, and subcontractors.
- 4.4.6 Notice of Reduction in Coverage.** In the event that any coverage required by this section is reduced, limited, or materially affected in any other manner, Professional shall provide written notice to City at Professional's earliest possible opportunity and in no case later than five (5) days after Professional is notified of the change in coverage.

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4.5 Remedies. In addition to any other remedies City may have if Professional fails to provide or maintain any insurance policies or policy endorsements to the extent and within the time herein required, City may, at its sole option exercise any of the following remedies, which are alternatives to other remedies City may have and are not the exclusive remedy for Professional's breach:

- Obtain such insurance and deduct and retain the amount of the premiums for such insurance from any sums due under the Agreement;
- Order Professional to stop work under this Agreement or withhold any payment that becomes due to Professional hereunder, or both stop work and withhold any payment, until Professional demonstrates compliance with the requirements hereof; and/or
- Terminate this Agreement.

Section 5. INDEMNIFICATION AND PROFESSIONAL'S RESPONSIBILITIES.

5.1 General Requirement. Professional shall indemnify, defend with counsel selected by the City, and hold harmless the City and its officials, officers, employees, agents, and volunteers from and against any and all losses, liability, claims, suits, actions, damages, and causes of action arising out of any personal injury, bodily injury, loss of life, or damage to property, or any violation of any federal, state, or municipal law or ordinance, to the extent caused, in whole or in part, by the willful misconduct or negligent acts or omissions of Professional or its employees, subcontractors, or agents, by acts for which they could be held strictly liable, or by the quality or character of their work. The foregoing obligation of Professional shall not apply when (1) the injury, loss of life, damage to property, or violation of law arises wholly from the negligence or willful misconduct of the City or its officers, employees, agents, or volunteers and (2) the actions of Professional or its employees, subcontractor, or agents have contributed in no part to the injury, loss of life, damage to property, or violation of law. It is understood that the duty of Professional to indemnify and hold harmless includes the duty to defend as set forth in Section 2778 of the California Civil Code. Acceptance by City of insurance certificates and endorsements required under this Agreement does not relieve Professional from liability under this indemnification and hold harmless clause. This indemnification and hold harmless clause shall apply to any damages or claims for damages whether or not such insurance policies shall have been determined to apply. By execution of this Agreement, Professional acknowledges and agrees to the provisions of this Section and that it is a material element of consideration.

5.2 PERS Indemnification. In the event that Professional or any employee, agent, or subcontractor of Professional providing services under this Agreement is determined by a court of competent jurisdiction or the California Public Employees Retirement System ("PERS") to be eligible for enrollment in PERS as an employee of City, Professional shall indemnify, defend, and hold harmless City for the payment of any and all employee and/or

employer contributions for PERS benefits on behalf of Professional or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of City, and any attorneys' fees and costs incurred by the City to enforce this Section.

- 5.3 **Design Professionals.** To the extent that the services under this Agreement include design professional services subject to California Civil Code Section 2782.8, as may be amended from time to time, Professional's duty to indemnify under Sections 5.1 and 5.2 shall only be to the maximum extent permitted by California Civil Code Section 2782.8.

Section 6. STATUS OF PROFESSIONAL.

- 6.1 **Independent Contractor.** At all times during the term of this Agreement, Professional shall be an independent contractor as defined in Labor Code Section 3353, and shall not be an employee of City. Nothing contained in this Agreement shall be construed to be inconsistent with the foregoing relationship or status. City shall have the right to control Professional only insofar as the results of Professional's services rendered pursuant to this Agreement and assignment of personnel pursuant to Subparagraph 1.3; however, otherwise City shall not have the right to control the means and methods by which Professional accomplishes services rendered pursuant to this Agreement. Professional shall have no power or authority by this Agreement to bind the City in any respect. All employees and agents hired or retained by Professional are employees and agents of Professional and not of the City. The City shall not be obligated in any way to pay any wage claims or other claims made against Professional by any such employees or agents, or any other person resulting from performance of this Agreement.

Notwithstanding any other City, state, or federal policy, rule, regulation, law, or ordinance to the contrary, Professional and any of its employees, agents, and subcontractors providing services under this Agreement shall not qualify for or become entitled to, and hereby agree to waive any and all claims to, any compensation, benefit, or any incident of employment by City, including but not limited to eligibility to enroll in PERS as an employee of City and entitlement to any contribution to be paid by City for employer contributions and/or employee contributions for PERS benefits. Professional shall not allow any employee, agent or subcontractor to become eligible for a claim for PERS benefits.

- 6.2 **Professional Not an Agent.** Except as City may specify in writing, Professional shall have no authority, express or implied, to act on behalf of City in any capacity whatsoever as an agent. Professional shall have no authority, express or implied, pursuant to this Agreement to bind City to any obligation whatsoever.

Section 7. LEGAL REQUIREMENTS.

- 7.1 **Governing Law.** The laws of the State of California shall govern this Agreement.

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- 7.2 Compliance with Applicable Laws.** Professional and any subcontractors shall comply with all laws and regulations applicable to the performance of the work hereunder, including but not limited to, the California Building Code, the Americans with Disabilities Act, and any copyright, patent or trademark law. Professional's failure to comply with any law(s) or regulation(s) applicable to the performance of the work hereunder shall constitute a breach of contract.
- 7.3 Other Governmental Regulations.** To the extent that this Agreement may be funded by fiscal assistance from another governmental entity, Professional and any subcontractors shall comply with all applicable rules and regulations to which City is bound by the terms of such fiscal assistance program.
- 7.4 Licenses and Permits.** Professional represents and warrants to City that Professional and its employees, agents, and any subcontractors have all licenses, permits, qualifications, and approvals of whatsoever nature that are legally required to practice their respective professions. Professional represents and warrants to City that Professional and its employees, agents, any subcontractors shall, at their sole cost and expense, keep in effect at all times during the term of this Agreement any licenses, permits, and approvals that are legally required to practice their respective professions. In addition to the foregoing, Professional and any subcontractors shall obtain and maintain valid Business Licenses from City during the term of this Agreement.
- 7.5 Nondiscrimination and Equal Opportunity.** Professional shall not discriminate, on the basis of a person's race, religion, color, national origin, age, physical or mental handicap or disability, medical condition, marital status, sex, or sexual orientation, against any employee, applicant for employment, subcontractor, bidder for a subcontract, or participant in, recipient of, or applicant for any services or programs provided by Professional under this Agreement. Professional shall comply with all applicable federal, state, and local laws, policies, rules, and requirements related to equal opportunity and nondiscrimination in employment, contracting, and the provision of any services that are the subject of this Agreement, including but not limited to the satisfaction of any positive obligations required of Professional thereby.

Professional shall include the provisions of this Subsection in any subcontract approved by the Contract Administrator or this Agreement.

Section 8. TERMINATION AND MODIFICATION.

- 8.1 Termination.** City may cancel this Agreement at any time and without cause upon written notification to Professional.

Professional may cancel this Agreement upon _____ days' written notice to City and shall include in such notice the reasons for cancellation.

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In the event of termination, Professional shall be entitled to compensation for services performed to the effective date of termination; City, however, may condition payment of such compensation upon Professional delivering to City any or all documents, photographs, computer software, video and audio tapes, and other materials provided to Professional or prepared by or for Professional or the City in connection with this Agreement.

- 8.2 Extension.** City may, in its sole and exclusive discretion, extend the end date of this Agreement beyond that provided for in Subsection 1.1. Any such extension shall require a written amendment to this Agreement, as provided for herein. Professional understands and agrees that, if City grants such an extension, City shall have no obligation to provide Professional with compensation beyond the maximum amount provided for in this Agreement. Similarly, unless authorized by the Contract Administrator, City shall have no obligation to reimburse Professional for any otherwise reimbursable expenses incurred during the extension period.
- 8.3 Amendments.** The Parties may amend this Agreement only by a writing signed by all the Parties.
- 8.4 Assignment and Subcontracting.** City and Professional recognize and agree that this Agreement contemplates personal performance by Professional and is based upon a determination of Professional's unique personal competence, experience, and specialized personal knowledge. Moreover, a substantial inducement to City for entering into this Agreement was and is the professional reputation and competence of Professional. Professional may not assign this Agreement or any interest therein without the prior written approval of the Contract Administrator. Professional shall not subcontract any portion of the performance contemplated and provided for herein, other than to the subcontractors noted in the proposal, without prior written approval of the Contract Administrator.
- 8.5 Survival.** All obligations arising prior to the termination of this Agreement and all provisions of this Agreement allocating liability between City and Professional shall survive the termination of this Agreement.
- 8.6 Options upon Breach by Professional.** If Professional materially breaches any of the terms of this Agreement, City's remedies shall include, but not be limited to, the following:
- 8.6.1** Immediately terminate the Agreement;
 - 8.6.2** Retain the plans, specifications, drawings, reports, design documents, and any other work product prepared by Professional pursuant to this Agreement;
 - 8.6.3** Retain a different Professional to complete the work described in Exhibit A not finished by Professional; or

- 8.6.4 Charge Professional the difference between the cost to complete the work described in Exhibit A that is unfinished at the time of breach and the amount that City would have paid Professional pursuant to Section 2 if Professional had completed the work.

Section 9. KEEPING AND STATUS OF RECORDS.

- 9.1 **Records Created as Part of Professional's Performance.** All reports, data, maps, models, charts, studies, surveys, photographs, memoranda, plans, studies, specifications, records, files, or any other documents or materials, in electronic or any other form, that Professional prepares or obtains pursuant to this Agreement and that relate to the matters covered hereunder shall be the property of the City. Professional hereby agrees to deliver those documents to the City upon termination of the Agreement. It is understood and agreed that the documents and other materials, including but not limited to those described above, prepared pursuant to this Agreement are prepared specifically for the City and are not necessarily suitable for any future or other use. City and Professional agree that, until final approval by City, all data, plans, specifications, reports and other documents are confidential and will not be released to third parties without prior written consent of both parties.
- 9.2 **Professional's Books and Records.** Professional shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to the City under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to the Professional pursuant to this Agreement.
- 9.3 **Inspection and Audit of Records.** Any records or documents that Section 9.2 of this Agreement requires Professional to maintain shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of the City. Under California Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds TEN THOUSAND DOLLARS (\$10,000.00), the Agreement shall be subject to the examination and audit of the State Auditor, at the request of City or as part of any audit of the City, for a period of three (3) years after final payment under the Agreement.

Section 10. MISCELLANEOUS PROVISIONS.

- 10.1 **Attorneys' Fees.** If a Party to this Agreement brings any action, including an action for declaratory relief, to enforce or interpret the provision of this Agreement, the prevailing Party shall be entitled to reasonable attorneys' fees in addition to any other relief to which that Party may be entitled. The court may set such fees in the same action or in a separate action brought for that purpose.

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- 10.2 Venue.** In the event that either Party brings any action against the other under this Agreement, the Parties agree that trial of such action shall be vested exclusively in the state courts of California in the County of Sacramento or in the United States District Court for the Eastern District of California.
- 10.3 Severability.** If a court of competent jurisdiction finds or rules that any provision of this Agreement is invalid, void, or unenforceable, the provisions of this Agreement not so adjudged shall remain in full force and effect. The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.
- 10.4 No Implied Waiver of Breach.** The waiver of any breach of a specific provision of this Agreement does not constitute a waiver of any other breach of that term or any other term of this Agreement.
- 10.5 Successors and Assigns.** The provisions of this Agreement shall inure to the benefit of and shall apply to and bind the successors and assigns of the Parties.
- 10.6 Use of Recycled Products.** Professional shall prepare and submit all reports, written studies and other printed material on recycled paper to the extent it is available at equal or less cost than virgin paper.
- 10.7 Conflict of Interest.** Professional may serve other clients, but none whose activities within the corporate limits of City or whose business, regardless of location, would place Professional in a "conflict of interest," as that term is defined in the Political Reform Act, codified at California Government Code Section 81000 *et seq.*

Professional shall not employ any City official in the work performed pursuant to this Agreement. No officer or employee of City shall have any financial interest in this Agreement that would violate California Government Code Sections 1090 *et seq.*

Professional hereby warrants that it is not now, nor has it been in the previous twelve (12) months, an employee, agent, appointee, or official of the City. If Professional was an employee, agent, appointee, or official of the City in the previous twelve months, Professional warrants that it did not participate in any manner in the forming of this Agreement. Professional understands that, if this Agreement is made in violation of Government Code §1090 *et seq.*, the entire Agreement is void and Professional will not be entitled to any compensation for services performed pursuant to this Agreement, including reimbursement of expenses, and Professional will be required to reimburse the City for any sums paid to the Professional. Professional understands that, in addition to the foregoing, it may be subject to criminal prosecution for a violation of Government Code § 1090 and, if applicable, will be disqualified from holding public office in the State of California.

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10.8 Solicitation. Professional agrees not to solicit business at any meeting, focus group, or interview related to this Agreement, either orally or through any written materials.

10.9 Contract Administration. This Agreement shall be administered by _____ ("Contract Administrator"). All correspondence shall be directed to or through the Contract Administrator or his or her designee.

10.10 Notices. Any written notice to Professional shall be sent to:

Email Address (for Insurance Update Requests)

Any written notice to City shall be sent to:

10.11 Professional Seal. Where applicable in the determination of the Contract Administrator or when required by law, the first page of a technical report, first page of design specifications, and each page of construction drawings shall be stamped/sealed and signed by the licensed professional responsible for the report/design preparation. The stamp/seal shall be in a block entitled "Seal and Signature of Registered Professional with report/design responsibility," as in the following example.

Seal and Signature of Registered Professional with
report/design responsibility.

10.12 Integration. This Agreement, including the scope of work attached hereto and incorporated herein as Exhibit A, and the compensation schedule attached hereto and incorporated herein as Exhibit B, represents the entire and integrated agreement between City and Professional and supersedes all prior negotiations, representations, or agreements, either written or oral.

10.13 IRS Form W-9. Professional shall complete and submit Internal Revenue Service Form W-9 to the City before execution of this Agreement. The City's Finance Director shall have authority to waive this requirement.

ITEM 3.1.

ATTACHMENT 1
CONTRACT NO.: 20XX-XXX

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the day and year first set forth above, which date shall be considered by the Parties to be the effective date of this Agreement.

CITY OF RANCHO CORDOVA

PROFESSIONAL

Micah Runner, City Manager

Date: _____

Attest:

Stacy Leitner, CMC, City Clerk

Date: _____

Approved as to Form:

Adam U. Lindgren, City Attorney

[NAME, TITLE]

Date: _____

Last Revised January 2022

Professional Services Agreement between
City of Rancho Cordova and _____

[DATE]
Page 15 of 15

EXHIBIT A
SCOPE OF SERVICES

SAMPLE

EXHIBIT B
COMPENSATION SCHEDULE

SAMPLE

Form (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
---	--	---

W-9

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

☐ Other (see instructions) ▶ _____

☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

6 City, state, and ZIP code

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number	
or	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)



8700 N.E. Oddfellows Rd.
Bainbridge Island, WA
98110

BUSINESS STREET, LLC

Office: 206-780-0553
Cell: 206-498-8532
Email: rdstevensjr@gmail.com

Friday, October 6, 2023

Ms. Amanda Norton
Economic Development Manager
The City of Rancho Cordova
via email

Re: Proposal for Economic Development Strategic Plan and Implementation Plan

Dear Ms. Norton:

We are pleased to submit this proposal to the City of Rancho Cordova. As principal of Business Street, an LLC, I will be the prime contractor. I will be assisted by Ted Kamp of Leland Consulting in retrieving and mapping government data, and by Gladys Cornell of Aim Consulting in public outreach and meeting facilitation. Assuming you adhere to the schedule published in your RFP, we have the resources to easily meet your target completion date.

Your RFP asks for a complete economic development strategy that includes a competitive SWOT analysis, identifies target industries, aligns your strategy with regional efforts, and provides detailed implementation steps for business retention, expansion and recruiting. Further, you are concerned that this strategy address the needs of the underserved.

Three qualities distinguish our team and approach:

1. Place-based economic development. We believe strategy should be based on the skills and interests of people already living and working in a place. Done right, this strategy will leave no one behind.
2. We do our homework. To identify those skills and interests, we will map and research local companies and real estate conditions, identify local companies and industry clusters, research and contact them to learn what they make and sell, profile the occupational skills of their workers, and determine what actions you can take to help them realize their opportunities and overcome their challenges.
3. We get results. This includes meaningful public participation, identifying stakeholders who can be your partners in implementation, and the measurable attraction of new business and investment. Our resumes and examples of relevant experience demonstrate this.

We have worked with Rancho Cordova on a number of important projects. We look forward to continuing that collaboration.

Sincerely,

A handwritten signature in blue ink that reads "Rod Stevens".

Principal

Proposal for Economic Development Strategic Plan & Implementation Plan

Qualifications and Proposal
to the City of Rancho Cordova

Friday, October 6, 2023



Our Team

Our team is led by Rod Stevens, a revitalization strategist specializing in urban and economic development. Rod will be assisted by Ted Kamp of Leland Consulting Group, a data and GIS specialist, and Gladys Cornell of Aim Consulting on communication, outreach, and meeting facilitation. Together, our team has about 80 years of combined experience, and it will be the three of us doing the work, not junior associates.



Rod Stevens | Lead Development Consultant

Rod will manage the project; carry out the business, industry, and real estate analysis; oversee the meetings with business and industry stakeholders; and manage production of the strategy and implementation plan. Rod has more than 40 years of experience in business and real estate, much of that creating innovative places and ventures that advance how we live, work, and learn. Rod's resume maps his experience on a variety of commercial revitalization and business development projects located across North America. In the Sacramento region, Rod has worked with five clients on nearly a dozen projects, including a number for your city in the mid to late 2000s.



Ted Kamp | Data Retrieval and Mapping Consultant

Ted Kamp of Leland knows where to find valuable data and how to make it tell a story. For Sacramento County, Ted and Rod worked together to create a map of the sales tax revenue from 10,000 businesses, revealing areas of unexpected strength, especially in the industrial areas. Ted is an expert at finding census data on occupations and commute patterns.



Gladys Cornell | Principal and Project Manager

Gladys Cornell of Aim Consulting is currently working with you on three projects: Mills Station, roundabouts, and the setting of new utility rates. Gladys has provided community engagement and meeting facilitation on a number of similar projects, including specific plans for commercial areas in Roseville, Davis, and Sacramento. She enjoys an excellent reputation with various local community, civic, business, and government leaders.

The end of this document includes resumes that provide more detail on our education and experience.

Relevant Experience

Our strategy and approach gets measurable results, in the number of people that show up at important events, new business, and investment on the ground. Other teams stop at statistical analysis, email notices, and stakeholder meetings. We get out in the field, go to people and companies, excite them about involvement, and learn their needs and interests. By the time we are done, we know a community inside and out and use that to create effective strategy.

We also know Sacramento and Rancho Cordova. For your general plan pro forma, Rod programmed where, what type of retail, and how much retail to locate throughout the city. He conducted market studies and recommended the creation of activity nodes along Folsom Blvd. More than once, he provided real estate expertise that supported your city in negotiating development agreements. Sacramento County has relied on him for five projects, including targeting where to invest public funds along commercial corridors, advising on the sale of its interest in McClellan, and programming and running the board of supervisors' retreat on economic development. Fulcrum Development, a major regional developer and investor, has known and worked with Rod for the past 20 years. Rod also has advised the Cities of Sacramento and West Sacramento on how to update their old industrial areas to get more wages per acre. Gladys Cornell has lived in and practiced public involvement in the Sacramento region for about 20 years, and you are working with her now.

The following three specific examples highlight our effectiveness in working with mid-sized cities like yours with diverse communities and a significant amount of institutional or industry employment. The fourth example describes how Gladys Cornell recently generated significant turnout for your Mills Crossing charrette.

Chapel Hill, NC

Downtown Innovation District Strategy

Over the last ten years, Rod has worked on over a dozen economic development projects in Chapel Hill, including the definition of its three central ED marketing promises. The strategy for an innovation district, jointly funded by the town government and the University of North Carolina- Chapel Hill (UNC), aims to create more local jobs and collaboration with industry. Part 1 defined the areas of UNC's expertise that would attract industry, the scale and type of operation that would best fit town goals, and these companies' space needs. Part 2 was figuring out where and how to develop new offices and wet labs in a downtown with a limited number of larger sites. Part 3 was building commitment to action among three implementation partners, with specific actions to be completed in six, 12, and 24 months.

The strategy and action plan have created results less than a year later. The university doubled its commitment for space in a renovated office building and recently opened a new incubator, and Longfellow, a major life sciences REIT, acquired a \$20 million site and applied to develop 320,000 s.f. of wet lab space. Importantly, there is now such strong support for this strategy that there has been little or no public debate about it in current mayoral and council elections.

Reference:

Dwight Bassett, Economic Development Director, Town of Chapel Hill
919-602-9735, dbassett@townofchapelhill.org

1



San Leandro, CA

Next-Generation Work District Strategy

Once a thriving Bay Area industrial center, San Leandro lost many of its larger manufacturing companies over the last four decades, leaving obsolescent older buildings. What disheartened civic leaders failed to grasp was that the city still had a number of smaller companies with expertise originally developed in large-scale manufacturing. After exhaustive mapping of the real estate conditions, Rod began reviewing Google maps of local business, driving the industrial area to identify more interesting businesses, and knocking on the doors of those in key industry clusters. He found more than 50 companies using advanced techniques, selling high-value products, and paying high wages. When he showed the City Council a graphic with the logos of these companies, a collective sense of “We never lost it!” ran through the chamber.

Rod worked with staff to develop a recruitment and retention strategy that filled more than 300,000 square feet in an old Dodge plant and Kellogg cereal factory with companies brewing beer and designing and producing high-tech products. The ultimate mark of acceptance in the investment world came when Blackstone, the world’s second largest private property owner, acquired those old factories and began upgrading them for life sciences companies. About a dozen startups have moved down from Berkeley and Emeryville in the last three years. The city still uses the marketing message Rod developed, “We make things!”.

Reference:

Deborah Acosta, former Chief Innovation Officer
510-508-7926, deborah@weaccel.io

2



Davis, CA

Tech Transfer Strategy for UC Davis

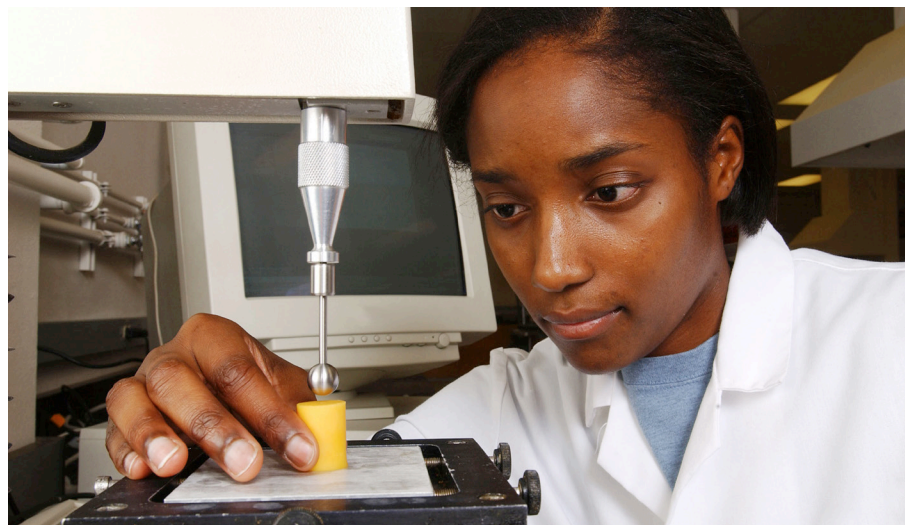
In the early 2010s, state funding cutbacks forced layoffs at UC Davis, and the university looked to new corporate partnerships to make up the difference. Sacramento developer Mark Friedman, an informal advisor to then-UC Davis president Linda Katehi, offered to fund half of this strategy, on condition that Rod prepare it. Rod did so in three phases. The first identified the university's transferable expertise. In the second phase he reached out to companies to determine their needs, using the contacts of top university researchers, administrators, and board members to arrange meetings with the senior research directors of major companies located across the U.S. In the third phase, Rod met with the provost, school deans, and other administrators to identify the internal changes necessary to support these partnerships.

As a direct result of Rod's outreach, three major companies expressed an interest in locating labs nearby, and a fourth, Bayer Crop Sciences, did so within two years. This strategy and action plan became the basis for the proposal for the World Food Center in the Railyards that has now become the Aggie Square project.

Reference:

Mark Friedman, Chairman, Fulcrum Property
916-383-3333, mark@fulcrumproperty.com

3



Rancho Cordova, CA

Mills Crossing Charrette Outreach

This recently completed project shows Aim Consulting and Gladys Cornell's ability to generate enthusiastic public participation. In most jurisdictions, a typical event attracts 25 to 50 people. Gladys and her team at Aim got 150 people to RSVP and participate in the charrette. They did so with successive waves of outreach and publicity, first phoning and emailing civic and neighborhood leaders who spread the word informally. Next, they put up lawn signs, posted flyers at Starbucks, and left cards in libraries, telling librarians about the event. For several weeks in advance, they staffed tables and popped up at community events like Good Neighbor Day, where they explained the event and made face-to-face contact with thousands of people. One week before, they began a media blitz that included conventional newspaper advertising and social media banners. Finally, on the day of the event, they brought balloons and food trucks to City Hall, making entering the event exciting. People stayed for five hours. All this was done with the city branding package and no show of the Aim logo.

Reference:

Stefan Heisler, Housing Manager, City of Rancho Cordova
916-851-8757

4



Places of Interest

Having worked in your community and read your detailed RFP, we know that you need to both activate *and* revitalize specific places.

Here are some of those:

- **Folsom Blvd.**

This can be a place to not only live, shop and dine, but also work. Renovated work spaces along this corridor may attract investment where other uses have not.

- **Your Work Districts**

These include Mather and the business parks near City Hall north and south of White Rock Dr. and industrial parks near the intersection of Sunrise and Hwy. 50. Vacancies have risen because of outsourcing, telecommuting, and competition from mixed-use places, and could grow because of AI. While the industrial parks now generate high sales tax revenue, they could employ more people in higher-wage jobs.

- **Mills Crossing**

This can be not only an essential place for health care, civic gatherings, and after-school and leisure activities, but also a center for training, up-skilling, and new business development. If your final plan includes a significant amount of commercial space, you may also need institutional partners to help pay the rent.

Understanding of Your Needs

Here are some of the central points we took away from the document and the response to our questions:

- **Inspiring Vision**

Like your city incorporation, you want an ED vision that will bring pride of place to the community.

- **Priorities**

Economic development includes real estate investment, skills development, and company growth and attraction. All this requires promotion, working with public and private partners, negotiating and shepherding deals, and keeping the council and public informed about why you are doing what you are doing. The council has yet to set priorities for “early wins”. The process of creating this strategy should help your council set those.

- **Effective and Inclusive Strategy**

Most ED strategies sit on a shelf because they are a collection of background statistics, charts, and generic recommendations that do little to guide efforts. You have requested both a strategy and an implementation plan with specific steps that have been costed, sequenced, timed, and assigned. If the strategy-setting process is carried out right, there will be both consensus on the strategy and commitment to implementation, not only in your community and government, but with institutional partners. Most importantly, this strategy should benefit everyone, which will require extra work to identify those whose needs are not being met and whose voices are not being heard.

Our Approach

From working closely with communities, we have developed a unique approach to creating strategy that works. Here are several key aspects:

- **Place-based development**

We create strategy based on the skills and interests of the people already living and working in a place. Commercial data bases like Co-Star and InfoUSA are notoriously inaccurate about real estate and local businesses, so we spend considerable time on original research that includes map review, windshield surveys, and one-on-one interviews with business managers about their activities and operations.

- **We respect people's time**

This means getting ready before posing questions or asking them to attend a meeting or event. We will review documents and carry out statistical analysis early in the project so we are better informed on the trends and background conditions before asking people questions about their specific situation.

- **Council Involvement**

Our scope-of-work includes three additional council work sessions not in your RFP: one after our initial document research, the second after the stakeholder interviews and field research, and a third to hear a summary of the community workshop and review the preliminary strategy.

We will carry out the tasks in five phases:

1. Project Organization and Overview
2. Organizational, Economic and Industry Analysis
3. Stakeholder Meetings and Field Research
4. Draft Strategy and Public Outreach
5. Final Strategy and Implementation Plan

Scope of Work

Phase 1: Project Organization & Overview

1. Logistics: schedule, contact information, communication methods
2. Departmental interviews on opportunities and challenges for the strategy effort
3. Preliminary list of stakeholder and community groups, including neighborhood, ethnic, and civic; business, industry and regional economic; and medical, educational and institutional
4. Outreach plan and schedule
5. Website for public messaging and document retrieval
6. City Council work session on goals, outcomes, metrics, schedule, work product, and participation

Phase 2: Organizational, Economic & Industry Analysis

1. Community profile: demographic statistics, workforce characteristics, data from the Housing Element, ESRI Tapestry data, census commute data
2. Profile business and industry with SIC employment data, local occupational data, business license data, Chamber membership, regional economic strategies, lists of major private employers, industry meet-up attendance, and Business Journal articles and lists
3. Existing programs:
 - i. Map K-12 career and technical programs; training programs at Los Rios, Sac State, private colleges, and hospitals; SMUD programs and tools for ED, workforce development programs
 - ii. Analyze effectiveness of industry and workforce strategies, tools, alignment with RC
 - iii. ED impact of neighborhood programs, small business assistance, revitalization projects
4. Identify/ assess programs targeted at the under-served
5. Real estate:
 - i. Map employment-related uses and employment densities, building age and floor-area-ratios
 - ii. Review brokerage house market reports and Business Journal reports on local leasing and development
6. Council workshop

Scope of Work continued

Phase 3: Stakeholder Meetings & Field Research

1. Stakeholder meetings:
 - i. Neighborhood and civic groups, business and industry leaders, real estate, other
 - ii. Phone and email outreach; expand list per recommendations.
 - iii. Venue scheduled one month in advance
 - iv. Information packets distributed to attendees in advance.
 - v. Topics to include strategic concerns, opportunities, challenges, essentials for the under-served
 - vi. Compile bullet list of comments by subject area
2. One-on-one meetings with institutional leaders:
 - i. Mayoral introduction to school districts, Los Rios, Mills Crossing partners, leading developers
 - ii. On-line review of these organizations priorities, strategies and plans.
 - iii. Phone, zoom, and in-person interviews to explain purpose and timing of the effort, future opportunities and challenges, and changes necessary to include the under-served
 - iv. Compile bullet list of findings by subject area
3. Field research:
 - i. Create economic employment map showing major employers, key sales tax generators, institutional anchors, gathering places, significant new commercial development
 - ii. Use Google Maps to identify companies that may be part of local industry clusters
 - iii. Drive business parks and commercial areas, noting uses, types of companies, use levels, and companies indicative of new and emerging industry clusters
 - iv. Call, email or visit business managers to discuss operations and workforce, distinctive skills and expertise, reasons for locating in RC and alternative locations, opportunities and challenges for growth, and other firms up and down their supply chain suitable for RC
4. Revise profile of business, industry and real estate:
 - i. Create graphic showing major industry clusters and sample companies within them
 - ii. Bullet point summary of their operations and business niche, reason for locating in RC, opportunities and challenges, and workforce needs and skills
 - iii. Summarize companies and commercial tenant attraction, attachment to RC
5. Hold Council workshop on additional findings

Scope of Work continued

Phase 4: Draft Strategy & Public Outreach

1. Competitive analysis and positioning
 - i. Identify/ characterize three or more competing places
 - ii. Summarize RC's internal strengths/ weaknesses and external threats/opportunities
 - iii. Relate to regional efforts and national industry trends
2. Draft strategy:
 - i. Prepare identity and positioning statement, definition of RC's distinctive advantages, vision of what this means day to day for current residents and workers, target industry clusters and types of business
 - ii. Define essential changes in industrial ecosystems necessary for RC to compete, incl. real estate, education and training, finance and investment, institutional change, and governance.
 - iii. Identify ED opportunities for different groups, businesses and institutions
 - iv. Model two or three options/ variations
 - v. Test strategy and options with selected stakeholders and potential industry partners
3. Community workshop:
 - i. Identify goals, date, format, venue, metrics for event
 - ii. Expand invite list per stakeholder recommendations
 - iii. Summarize findings, draft strategy, options, questions in review boards
 - iv. Begin outreach, hold event, summarize comments
4. Council workshop to review strategy and comments

Phase 5: Final Strategy & Implementation Plan

1. Revise draft strategy per public, council and stakeholder feedback:
 - i. Detail strategy to include target industries and company types, new programs and policies, and institutional partnerships
 - ii. Specify goals, outcomes and metrics for the next three years
2. Create implementation plan:
 - i. Identify cost, timeline, difficulty, payoff, responsibility for specific actions
 - ii. Review with institutional partners for consensus and commitment.
 - iii. Prioritize per effectiveness and commitment
3. Council workshop to review and approve
4. Final documentation:
 - i. Detailed summary compiling process, findings, strategy and implementation plan
 - ii. Summary booklet for strategy and implementation

Deliverables

Progress reports

We will submit one after each phase, summarizing the findings, analysis and planning materials developed in the foregoing work. This will be formatted in tables, charts and bulleted text with introductory paragraphs, and will include attachments such as drafts of outreach materials.

PowerPoint presentations

We will create decks for each Council workshop.

Presentation boards, flyers, and invitation cards.

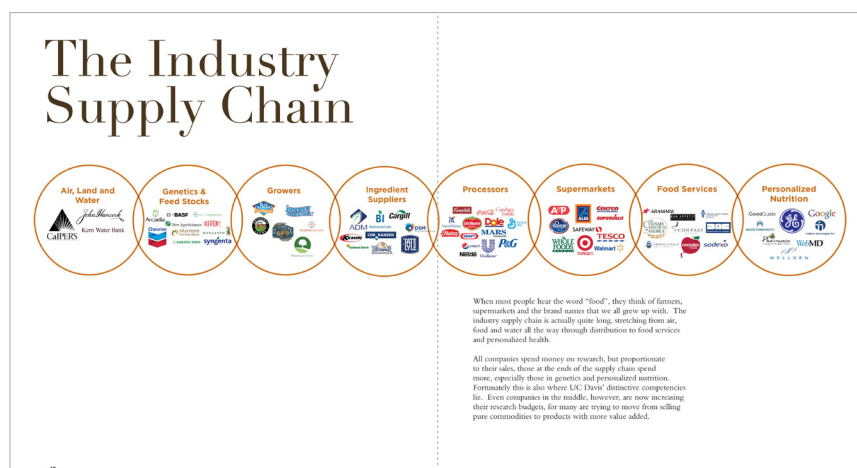
You will receive the text and graphics for our outreach materials in advance for your review.

Economic development strategic plan

We use a very concise and approachable format, refined over the last 15 years, that has proven to create understanding with staff, boards and institutional partners. This consists of a booklet, usually about 20 pages, with a two-page spread for each major topic. The booklet creates an overall narrative of your challenges, opportunities and solutions. Many of the spreads include an engaging graphic with a detailed caption of memorable information. A separate technical appendix contains the supporting detail, compiled from the progress reports and other foregoing research and analysis, that is presented in tables, charts, and bullets.

Implementation plan

We will create a document with the same format as the economic development plan, focusing on your key customers, marketing messages, critical path items, and actions.



A sample page from the tech transfer strategy for UC Davis, showing potential corporate partners identified during Business Street's research and corporate outreach. Strategy sponsor Mark Friedman was so impressed that he requested it be reprinted as a three-foot chart for a meeting with deans and other university leaders.

Schedule & Fee

Option A:

The table on page 15 shows the sequence, duration, lead consultant, and cost for the major tasks. The total cost of this work is \$165,000. We can complete this approach in nine to ten months, which would avoid the holidays. The cost of the community and council workshops is about \$75,000, or slightly less than half the total. Those efforts could be scaled back, but given your community's interest in these issues, we believe this is money well spent.

Option B:

Given that your council is still setting its priorities for economic development, phasing your efforts could be advisable. Business Street used this strategy with the Town of Chapel Hill, and it has been very effective at building understanding.

This approach would begin with a statistical profile of your community, workforce, business and real estate conditions, effectively holding up an economic mirror to your city. Combined with a council workshop, this profile could be prepared for \$30,000 and completed in about six to eight weeks. In a successive contract, Business Street would then go beyond the statistics, delving into the community assets that pave the way to the future.

We are happy to proceed with either option.



Task	Budget	Lead	Month											
			1	2	3	4	5	6	7	8	9	10	11	12
Organization and Overview														
1.1	Logistics & organization	3,000	Joint											
1.2	Dept. interviews	4,000	B-S											
1.3	Database & stakeholder ID	3,000	Aim											
1.4	Outreach plan	4,000	Aim											
1.5	Website design	2,000	Aim											
1.6	Council workshop	5,000	Joint											
Organizational, Economic and Industry Analysis														
2.1	Community profile	10,000	B-S											
2.2	Business profile	3,000	B-S											
2.3	Existing programs	4,000	B-S											
2.4	Efforts for underserved	4,000	B-S											
2.5	Real estate conditions	6,000	B-S											
2.6	Council workshop	5,000	B-S											
Stakeholder Meetings and Field Research														
3.1	Stakeholder meetings	15,000	Joint											
3.2	One-on-one meetings	5,000	B-S											
3.3	Mapping & field research	10,000	B-S											
3.4	Revise profiles	2,000	B-S											
3.5	Council workshop	4,000	Joint											
Draft Strategy and Public Outreach														
4.1	Competitive analysis	5,000	B-S											
4.2	Draft strategy	10,000	B-S											
4.3	Community workshop	28,000	Aim											
4.4	Council workshop	5,000	Joint											
Final Strategy and Implementation Plan														
5.1	Final strategy	5,000	B-S											
5.2	Implementation plan	8,000	B-S											
5.3	Council workshop	5,000	Joint											
5.4	Final documentation	10,000	B-S											
Total	165,000													



ROD STEVENS BUSINESS STREET

Rod has about four decades of experience in real estate and urban economic development. He specializes in the revitalization of retail, office, and industrial areas, especially projects that provide a better place for doing business. His approach combines deep research on user needs with knowledge of where and how to create feasible development that will draw investment. The map and bullets below show experience relevant to your needs:

INNOVATION DISTRICTS

- Davis, CA
- Chapel Hill, NC
- Surrey, BC
- Tumwater, WA
- Redmond, OR

INDUSTRIAL REVITALIZATION

- San Leandro, CA
- Sacramento City, CA
- West Sacramento, CA
- McClellan, Sacramento County, CA
- Port Angeles, WA
- Port Townsend, WA
- Lacey, WA
- Denver, CO

TRANSIT-ORIENTED DEVELOPMENT

- Portland, OR
- Vancouver, BC
- Bellevue, WA
- Redmond, WA

COMMERCIAL CORRIDOR & SHOPPING CENTER RE-USE

- Milwaukee, WI
- Bellevue, WA
- Bremerton, WA
- Eugene, OR
- Portland, OR
- Sacramento County, CA
- Stockton, CA
- Palo Alto, CA
- Rancho Cordova (Folsom Blvd.), CA
- Vancouver, BC

DOWNTOWNS & TOWN CENTERS

- Chapel Hill, NC
- Kenmore, WA
- Gig Harbor, WA
- Ocean Springs, MS
- Lawrence, KS
- Petoskey, MI
- Charleston, SC
- Arlington, TX

LARGE-SCALE PROJECT MANAGEMENT

- Portland, OR
- Renton, WA
- Kenmore, WA
- Sarasota, FL

DISADVANTAGED NEIGHBORHOOD INVESTMENT

- Sacramento, CA
- Chapel Hill, NC

CITY-WIDE COMMERCIAL STRATEGY

- Chapel Hill, NC
- Hillsborough, NC
- Port Townsend, WA





GLADYS CORNELL, Principal & Project Manager is a facilitation and community engagement specialist with more than 30 years of experience providing public engagement, media relations, and strategic communications services with an emphasis on transportation infrastructure and master plan projects. Gladys has served successfully as the public outreach project manager for multiple complex community plan and transportation projects that require an understanding of technical, fiscal and community issues and the ability to create a space for constructive dialogue.

REPRESENTATIVE PROJECT EXPERIENCE

City of Sacramento, Downtown Railyards Ventures

AIM served as the community engagement and public outreach consultant for Downtown Railyard Venture, the developer of the Sacramento Railyards, during the entitlement process for The Railyards. As one of the largest urban infill development sites in the nation, the Railyards plan will transform a 200-acre former industrial site into a unique urban district adjacent to downtown. AIM worked with the development team during the update of the Railyards specific plan to involve the community to ensure the Railyards fit within the existing context of community. Working with business associations, active transportation interests, community-based organizations, and local agencies, Gladys facilitated more than twenty briefings and discussions with local residents and key stakeholders. Gladys also designed a robust engagement program that included a social media campaign, an informational video series, community workshops, and media relations. AIM's efforts to engage the community and inform them about the project's benefits were made manifest in October 2016 when the Sacramento City Council approved planning entitlement for the Sacramento Railyards.

City of Davis, Downtown Davis Plan

AIM served as the public outreach consultant for the City of Davis on their Downtown Davis Plan. This plan will develop the future 2040 Downtown Davis Plan and create a guide for long term development and infrastructure. The project team will evaluate existing development policies, codes and guidelines, and address recurring challenges to the development process in a way that adheres to the community's vision for downtown Davis. As Outreach Manager, Gladys developed and is implementing a robust public outreach plan that involves a comprehensive group of stakeholder perspectives as well as the community-at-large in multiple ways throughout the process to ensure the final Downtown Davis Plan is community-based and fits within the context of the City of Davis.

AIM's responsibilities include developing and updating a project website, coordinating and facilitating a series of focus group and Downtown Davis Plan Advisory Committee meetings, developing and launching a public awareness campaign and pop-up workshop series, and designing and developing a virtual community workshop. AIM's other responsibilities include assisting in a design charrette, planning and facilitating a public workshop, and creating two informational videos.

City of Folsom, Folsom Boulevard Class I Bicycle and Pedestrian Overcrossing Feasibility Study

AIM is currently serving as the public outreach consultant for the City of Folsom on their Folsom Boulevard Class I Bicycle and Pedestrian Overcrossing Feasibility Study. This project is currently studying the feasibility for a new bicycle and pedestrian bridge over Folsom Boulevard between Blue Ravine Road and Glenn Drive to improve bicycle and pedestrian safety and close a gap in the Humbug-Willow Creek Trail System. As Outreach Manager, Gladys developed and is implementing a robust community engagement campaign that includes focus group, City Council meetings, Parks and Recreation Commission Meetings, Traffic Safety Committee Meetings as well as a community awareness and education program that includes a community questionnaire, community outreach meetings and updates to the project website.

City of Roseville, Commercial Corridors Project

AIM Staff coordinated with the City of Roseville's Planning Staff to develop and implement a community engagement process that partnered with key stakeholder groups and the community-at-large for each of the three corridor plans throughout the plans' development process. The overall community engagement goal was to encourage community input throughout the process to ensure community context is reflected in each corridor plan. By giving the community a meaningful voice in the planning process, the City built alignment between the City and community's vision and goals and incorporate the community's aspiration and concerns in each Specific Plan. At each of the three major touchpoints AIM staff worked with the City's planning staff to develop and implement three live working sessions with the community. Using a web-based platform such a Zoom and other visual collaborative platforms such a Miro, AIM hosted a collaborative visioning and interactive design workshops. Gladys developed facilitation plans for each workshop which included both presentations and collaborative engagement exercises that may include brainstorming and ideation using a virtual whiteboard and online polling, visual preference surveys using precedent imagery, map-based and diagramming activities.

PROFESSIONAL EXPERIENCE

AIM Consulting, Inc.
Principal
2005 – Present

Kleinfelder, Inc.
Vice President of
Corporate
Communication and
Marketing
1992 – 2005

CRSS Constructors, Inc.
Public Affairs and
Communications
1989 – 1992

Boyle Engineering
Corporation
Public Information
1988 – 1989

EDUCATION

Bachelor of Arts,
Journalism
California State
University, Sacramento

PROFESSIONAL ORGANIZATIONS

Urban Land Institute

International Association
of Public Participation
(IAP2)



Ted Kamp
Senior Associate

Edward "Ted" Kamp provides market analysis in support of strategic land use decisions for public planners and private developers. Drawing on expertise in GIS, market economics, and demographic analysis, he incorporates user-friendly information design to convey critical market intelligence to stakeholders.

His work spans a variety of development and planning contexts including urban infill, economic development, suburban revitalization, impact analysis, and transit-oriented development. Recent client work has covered locales across the western and central US. In addition, he taught the Urban Market Analysis course for planning graduate students at the University of Colorado-Denver for five years.

After receiving a BBA (with honors) from the University of Oklahoma and an MS in Marketing/Consumer Behavior from the University of Arizona, Ted provided research and strategic planning services for the Leo Burnett advertising agency in Chicago. He subsequently earned a Masters in Urban and Regional Planning (and completed PhD coursework) at the University of Colorado-Denver. He has provided urban market analysis consulting services for the past 18 years.

Education

- Master of Urban and Regional Planning, PhD coursework, University of Colorado
- Master of Science, Marketing (Consumer Behavior), University of Arizona
- Bachelor in Business Administration (with honors), University of Oklahoma

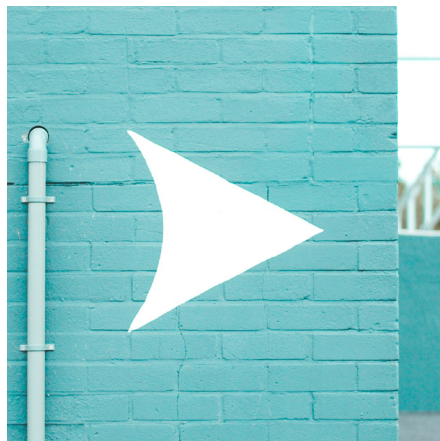
Awards and Publications

- 1999 Outstanding Graduate: Urban and Regional Planning Masters Program, University of Colorado-Denver
- 1998 ASCP McClure Student Award: "Empathy and Planning" (best paper nationally by a masters student)
- Author, with Deborah MacInnis: "Characteristics of Portrayed Emotions in Commercials: When Does What is Shown in Ads Affect Viewers," Journal of Advertising Research, December 1995

Project Experience

- Brooks Corridor TOD Analysis, Missoula, MT
- Higgins Avenue Corridor Plan: Brooks to Broadway, Missoula, MT
- Burnsville Center and Corridor Master Plan, Burnsville, MN
- State Street TOD Design and Implementation Plan, Boise, ID
- Commercial Corridors Strategy, Vancouver, WA
- Health Corridor Master Plan and Economic Feasibility Study, Coeur d'Alene, ID
- University Avenue Corridor, West Des Moines, IA
- Market Analyses for Mixed-Use Projects, Missoula, MT
- Corridor Master Plan, Gretna, NE
- Downtown Corridor Study, Merriam, KS
- Retail Strategy, Westminster, CO
- Town Center Specific Plan, Covina, CA
- Northwest Growth Area Plan, Coralville, IA
- Wilburton-Grand Connection Study, Bellevue, WA
- Merle Hay Road Market Study, Johnston, IA
- South US 97 Corridor Plan, Redmond, OR

Proposal



Economic Development Strategic Plan and Implementation Plan

SUBMITTED BY FOURTH ECONOMY FOR CITY OF RANCHO CORDOVA
OCTOBER 6, 2023



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ITEM 3.1.

October 6, 2023

Amanda Norton
Economic Development Manager City of Rancho
Cordova Economic Development Department
2729 Prospect Park Drive
Rancho Cordova, CA 95670

PO Box 81620
Pittsburgh, PA 15217
engage@fourtheconomy.com
www.fourtheconomy.com

On behalf of Fourth Economy Consulting, I am pleased to present this proposal in response to your RFP for Rancho Cordova's Economic Development Strategic Plan and Implementation Plan. We appreciate your commitment to developing an informed, equitable, and actionable economic development plan. Fourth Economy has a proven track record in localities around the country of helping communities to do just that – and have the tools and expertise necessary to ensure this plan becomes a reality.

Fourth Economy is a national strategy firm (C-Corporation) providing community and economic development services focusing on economic equity and resilience. Our team of economic development practitioners, nonprofit leaders, and tier one researchers works remotely from locations across the country. We are a subsidiary of Steer, an international, employee-owned consultancy focused on transportation and infrastructure with offices across North America, including Sacramento and Oakland. Steer and Fourth Economy are currently part of the planning team for the Link21 program.

Project Understanding

Rancho Cordova is a diverse, growing city of about 80,000 about 10 miles northwest of downtown Sacramento along US-50. Between 2010 and 2020, the city added 15,000 new residents and more than 11,600 jobs. Rancho Cordova was a job center before the pandemic, about 50,000 workers commuted in and 30,000 residents commuted out for work, but it is well positioned for the post-pandemic economy compared to many other communities. The city has experienced strong job growth in management, administration, and health care.

We have worked in a variety of similarly sized communities across the U.S with similar conditions and challenges. That experience means that we are well equipped to help:

- How to balance growth while preserving the character and qualities that attracted people to Rancho Cordova.
- How to define the identity of your community within your region and relative to larger neighbors.
- How to build on historical legacies without being trapped by them.

In the following proposal, we have described our capabilities and capacity as a firm. Our approach includes assessing community strengths, opportunities, and aspirations across five dimensions of economic competitiveness; engaging a wide range of stakeholders to ensure a diversity of voices are informing strategies; Build Sessions to co-create solutions with those who will benefit from this plan; and developing actionable and readily implementable solutions with clear metrics for measuring progress.

While we have highlighted key components of our approach and experience within similar scopes of work, we want to stress that we are a creative and innovative firm. We welcome the opportunity to design a range of right-sized work for this community. We also note that,

with significant federal funding resources pouring into communities, we are finding new opportunities to build momentum. If given the opportunity, we will bring a nimble and flexible approach to this scope of work.

Your investment in building Rancho Cordova's economic resilience through data-driven insights and informed strategic planning is commendable and can achieve your community's stated goals to drive growth and prosperity in the community. We are confident that our firm offers an approach to deliver this successful final product that positions Rancho Cordova for equitable economic prosperity.

I would be happy to answer any questions you may have and can be reached at 412-356-3755 or jerry.paytas@fourtheconomy.com.

With thanks for your time and consideration,



Jerry Paytas, Ph.D.
Vice President

Experience and References

What Sets Us Apart?

Fourth Economy helps communities and organizations create strategic, equitable, and resilient economies.

Fourth Economy is a mission-driven consulting group that seeks to equip change agents with the tools they need to build better communities and stronger economies. We employ rigorous data analysis and a multi-tiered engagement process to develop strategies and recommendations that are evidence-based and responsive to community priorities.

Our Experience

We believe inclusive and human-centered economies are at the heart of strong, equitable, and resilient communities. This belief has led Fourth Economy to commit to daylighting economic disparities and working with communities to develop actionable strategies to correct imbalances. Our experience fostering inclusive development has taken many forms over the years.

We have several ongoing relevant projects:

- **The New Growth Innovation Network (NGIN)** unites economic development leaders committed to building a new field of quality economic growth practice. NGIN contracted Fourth Economy to support LISC Jacksonville in its mission to stabilize homeownership and family wealth building in majority Black neighborhoods in Jacksonville, Florida. Fourth

Economy is working to identify areas with high concentrations of households at-risk of speculation to prioritize outreach efforts and strategies that preserve homeownership and family wealth creation among these households.

- Fourth Economy is currently working with the **City of Gresham, Oregon** to conduct a holistic economic assessment of the region and identify promising practices to help the City address the root causes of poverty and improve overall community wealth.
- We are currently working with the **Port of Portland** to understand the demographics of the Port related industries to advance the Port's diversity and inclusion goals.
- We are currently supporting the land use modeling as part of the planning team for the Link21 program for a second transit crossing of the San Francisco Bay.

Our experience fostering inclusive development has taken many forms over the years:

- We worked with **Ramsey County, MN**, to develop a first-of-its-kind Economic Competitiveness and Inclusion (ECI) Plan that prioritizes inclusion in future investments, and other actions related to housing, job creation, workforce development, and place-based investments while responding to the COVID-19 crisis.
- Fourth Economy provided support to the **NGA Center for Best Practices (NGA Center)** Children & Families Program and Workforce Development & Economic Policy Program by serving as researcher and lead author in the development of a publication on state policy levers that Governors can use to improve economic mobility, Advancing Economic Mobility for Low-Income Families: Policy Options for Governors.
- To better reflect the needs of its most distressed constituents, Fourth Economy provided strategic guidance to rebuild a community development intermediary, **Neighborhood Allies**.
- Our team advocated for anti-displacement policies by providing an in-depth analysis of tax incentives for the **City of Providence, Rhode Island**, and the **Housing Alliance of Pennsylvania**, respectively.
- We created new tools and policies for affordable housing development in **Pittsburgh, Pennsylvania**, including a community land trust and a home rehabilitation program.
- In Rhode Island, the Fourth Economy team has provided ongoing support to the **Greater Newport Chamber of Commerce** to aid in COVID-19 recovery efforts and worked with a Steering Committee to develop a strategic plan focused on adding capacity for local economic development; marketing the region's business opportunities; retaining and attracting talent; and supporting and leveraging existing industries.
- We supported communities like **Chester City, Pennsylvania and Scranton County, Pennsylvania**, facing disinvestment and fiscal challenges with appropriate solutions considering capacity, funding, and resource constraints.

With more than thirteen years of experience working on Strategic Economic Development Plans, Fourth Economy has provided economic development planning in the form of Comprehensive Economic Development Plans (CEDs) or comparable planning efforts for cities, counties, and municipalities. Fourth Economy would be delighted to assist Rancho Cordova in developing an Economic Development Action Plan that provides a clear path towards growing and diversifying its economy. Examples of similar projects we've completed are highlighted below. Additional project examples are included at the end of this document:

BERKS COUNTY STRATEGIC ECONOMIC DEVELOPMENT ACTION PLAN

Berks County in southeastern Pennsylvania comprises 72 municipalities and is home to both densely urban/suburban areas as well as rural and agricultural lands. **Like Rancho Cordova, its diversity of landscape and people are recognized as a strength of the community.** In developing a Strategic Action Plan for the County, Fourth Economy worked with the County of

Berks economic development team, along with a broader planning team that included leaders from economic agencies and partner organizations as well as the County's elected officials, to drive a process that prioritized deep economic analysis, strong community engagement, and the cultivation of strategies that were right sized for the communities that comprise Berks County.

RAMSEY COUNTY ECONOMIC COMPETITIVENESS AND INCLUSION PLAN

Ramsey County, MN, is the county seat and home to Saint Paul, the "twin city" of Minneapolis. **Similar to Rancho Cordova, the county seeks to define itself and establish its own identity within the broader context of the region.** Fourth Economy led the overall plan development and coordination between the local and national sub-consultants, and helped facilitate a holistic approach to addressing the community's opportunities and challenges to help Ramsey County achieve its vision of economic competitiveness and inclusion, where its business and talent strengths create new industry growth, all residents have access to existing and future economic opportunities, and racial disparities in employment, education, and wealth attainment are addressed.

STRATEGIC ECONOMIC DEVELOPMENT PLAN, SCRANTON, PA

Following decades of population decline and reduced tax base, the City of Scranton was seeking a catalytic strategic economic development plan to present a vision for the city that is forward-looking, actionable, and immediately implementable. The final report represents the vibrancy of "the Electric City" and highlights key findings, recommendations, neighborhood profiles, and an implementation plan with goals and metrics. **Scranton is similar in population size to Rancho Cordova, and both have rich historical legacies to build upon in bolstering their civic identity.**

References

Economic Competitiveness and Inclusion Plan -Ramsey County, MN

Kari Collins, Director, Ramsey County Community & Economic Development, 651.302.4455, kari.collins@ramseycounty.us

Comprehensive Plan - City of Allentown, PA

Irene Woodward, Director of Planning and Zoning, irene.woodward@allentownpa.gov, 610.437.7611 x 2866

Economic Action Plan - City of Atlantic City, NJ

Jim Rutala, Principal, Rutala Associates, LLC, jmrutala@comcast.net

Work Plan: Our Approach

The following information describes our plan for supporting the creation of an economic development strategic plan for Rancho Cordova. Our proposed approach is organized around the following goals to:

1. Mobilize the community
2. Assess competitiveness, gaps, and key drivers
3. Develop actionable strategies to drive growth and prosperity
4. Create an action plan that provides clearly defined strategies with metrics for measuring progress

While we have a proven approach to these types of engagements, we also recognize that, to be successful, we must be adaptable to adjusting our approach to best meet the needs of the City. To ensure our scope is aligning with expectations, we will ensure proactive communication with the Rancho Cordova project manager throughout the process and pivot when necessary.

Mobilize the Community

The cornerstone of Fourth Economy's approach pairs quantitative data with qualitative community insights. Robust community engagement processes uniquely tailored to Rancho Cordova and informed by our national best practices are central to our approach to this project.

We envision four forms of engagement to hear from an array of community members during the development of Rancho Cordova's economic development strategic plan:

1. Engagement with Council Member and other relevant city officials
2. Development of an Advisory Committee
3. Development of a website or web page that allows for community interaction, transparency, and understanding of key themes and topics relevant to the planning process
4. Broad-based Community Engagement

Fourth Economy would like to partner with Rancho Cordova's Economic Development Department to identify local community engagement partner(s) who have built trust within the community over the years. We believe a partnership with local organizations leads to quality feedback from diverse participants with varying degrees of investment and understanding of the Rancho Cordova economic landscape. By leveraging the expertise of trusted and experienced local engagement partners, Fourth Economy can collaborate to provide strategic outreach and engagement support to augment the capacity of the local engagement partners. This may include increasing participation through multilingual surveying and engagement approaches, hosting engagement sessions at accessible community centers that offer resources and services, and being creative with the way we extend outreach and communication. We look forward to discussing how Fourth Economy can be the best partner to local experts to ensure an inclusive, informative, and fun engagement process for the Rancho Cordova community.

ENGAGEMENT WITH COUNCIL MEMBERS AND CITY OFFICIALS

Fourth Economy will host a bi-weekly check-in call with the Client team and designated officials. This check-in will allow for open dialogue regarding progress and areas of focus and to ensure transparency as the planning process progresses. Our first call will be a working meeting to define the scope, expectations and intended outcomes.

We propose forming a monthly working group of broader city officials and related authorities that have a role in economic development. We will facilitate a public work session, open to council and the community, share initial findings and incorporate feedback. We also expect City staff to provide any available data, such as GIS mapping information. Property and land-use information and the ability to have ongoing requests from the consulting process filled.

ADVISORY COMMITTEE

An Advisory Committee should be composed of those representatives who will be critical to supporting analysis, engagement, and strategy development by serving as a core leadership group and sounding board. The Fourth Economy team will work with the Rancho Cordova team to identify inclusive membership, establish clear roles and responsibilities by executing a signed "job description," and facilitate bi-monthly meetings for our team to both report back on new insights and gather input and feedback from local experts.

BROAD-BASED COMMUNITY ENGAGEMENT

It is our goal to go beyond traditional methods of communication to reach each layer of the community stakeholders — from grassroots to grasstops. Diversifying outreach and communication begins with two guiding principles: one, use the appropriate contextual history to get the fullest picture and, two, work towards shared outcomes guided by best industry practices.

We will gather existing resources, past community and cultural history, and other data to ensure we have a thorough context for the pre-existing community conditions. In addition, our engagement strategy often incorporates attendance at community meetings, hearing community anecdotes, and scheduling one-on-one conversations with leaders and community members to best capture the landscape and community dynamic as appropriate. We will work with the Client team to tailor this strategy to the Rancho Cordova community. From what is learned, we begin to incorporate engagement opportunities that might include a short-term win like increased communication and participation throughout the community.

We also emphasize grassroots knowledge and lived experience within our community engagement work. We recognize that many residents may have passion and sound ideas for helping to grow their economy and improve their quality of life. We also recognize that the expertise necessary to build strong and equitable economies must come, in part, from the members of a community who know it best. To remove barriers, we will develop a process for providing stipends for residents to support the planning activities. These “plan ambassadors” will engage with us, providing outreach and communication support, and participate in Build Sessions as described later in this scope.

The goal outcome of our work is to encourage and increase community trust through participation. In particular, multiple and varied, sometimes dissenting, voices being a part of a planning process can only ensure that we have listened to, asked, and answered as many questions or concerns as possible. We don’t run from an audience because they do not share our opinion or are unfamiliar to us.

In addition to our formal work in community engagement, we work to ensure a community-driven aspect to the entire scope of the project. This includes ensuring inclusive language, developing guiding principles, providing cultural translation, reviewing market assessment and data, reviewing the impact of existing or future policies, and keeping historical and cultural context centered.

We recognize that many residents may have a passion and sound ideas for helping to grow their economy and improve their quality of life. We also recognize that the expertise necessary to build strong and equitable economies must come, in part, from the members of a community who know it best.

City of Rancho Cordova Overview

In order to establish an overview of Rancho Cordova that reflects residents, business owners, and community stakeholders, Fourth Economy would begin by reviewing prior reports, related initiatives, and programs; conducting stakeholder interviews; and listening to the community around several key topics and issues, including but not limited to:

- How has work and activity changed in Rancho Cordova since the pandemic?
- Are there significant occupations in the community at risk of disruption due to automation or AI?
- What opportunities exist for different demographics in the community?

- How do residents and businesses experience your community?
- Who can afford to live in your community?
- What opportunities can be leveraged to grow Rancho Cordova's economy within the broader context of the region?

This information, combined with the findings from the quantitative and qualitative work performed, will be used to produce a SWOT analysis. This document can be shared on a project website for public feedback, articulating the strengths the community should leverage, the opportunities it should pursue, the weaknesses it should mitigate, and the threats it should prepare for.

ORGANIZATIONAL ANALYSIS AND EXISTING PLAN REVIEW

It is essential that an analysis process builds upon the work that has come before it. Therefore, we will review existing economic and entrepreneurship-related studies, as well as any other reports or previous planning work suggested by the Steering Committee. We will take a regional approach to contextualizing Rancho Cordova strategy by analyzing initiatives and programs such as the Sacramento Region Community Economic Resilience Fund (CERF), Greater Sacramento Region Prosperity Strategy, and Greater Sacramento Economic Council. We will capture key data, compile notes on existing organizations and programs, and review and categorize previous strategies. These findings will be organized in a way that ensures their use and utility throughout the process.

INTERVIEWS

The Fourth Economy team believes interviews serve as a useful tool to establish a baseline understanding and to build initial support. We will work with leadership from the department, and the Steering Committee to determine the most appropriate stakeholders to interview, but assume that it will include:

- **Steering Committee Members** to understand the history, culture, context, and an initial understanding of the focus areas around which the plan will be created
- **Business Leaders** to understand their lived experiences, expectations, opportunities, and challenges within the local ecosystem
- **Public Sector Leaders** to understand existing strategies, tools, and mechanisms for support
- **Community Leaders** who will be critical to the implementation of future strategies to support and accelerate the growth of the community
- **"Owners" of Previous Programs and Plans** to understand what has already been implemented, what should be continued, and lessons learned from prior processes
- **Program Funders and Philanthropy** to understand current funding priorities, actively supported initiatives, and the impact of investments made to date.

KICK-OFF MEETING AND COMMUNITY LISTENING TOUR

The preceding work will culminate in a kick-off meeting and community tour. Because we will have had the opportunity to interview many of the Steering Committee members prior to the kick-off meeting, we will know what common questions or concerns they may have that we should address as a group. During this meeting, we will share initial findings, and get input on our plan for stakeholder engagement and for the analysis phase.

At the same time as the Steering Committee kick-off, we would typically conduct a community listening tour. It will be critical for the Fourth Economy team to be familiar with the community, its organizations, its participants, and its relationship to the rest of the region. This listening tour will allow us to gain familiarity with the strengths, weaknesses, assets, opportunities, and challenges across the ecosystem.

Assess Competitiveness, Gaps and Key Drivers

BASELINE DEMOGRAPHIC AND ECONOMIC ANALYSIS

There is no single recipe for economic success. However, we have found five critical attributes related to economic competitiveness that support vibrant and sustainable communities: Investment, Talent, Sustainability, Place, and Diversity. Fourth Economy employs this economic competitiveness framework to conduct a broad scan of data and trends to diagnose the community's economic conditions, challenges, and opportunities. We believe communities cannot succeed if they focus too narrowly on one or two specific goals or needs. It is essential to monitor how all the systems of the community function interactively. This framework will allow our team to understand what works and is not within the Rancho Cordova community.

ECONOMIC COMPETITIVENESS FRAMEWORK

Talent: a skilled workforce, with access to education that prepares residents to participate in the local economy

Place: an active and affordable community with high levels of civic engagement and a variety of quality of life assets

Talent and Place indicators are widely available and comparable from community to community, whereas the indicators for Diversity, Sustainability and Investment require more effort and have more local variation in the data sources and availability. The snapshot we developed for the baseline understanding provides some fundamental insights. Still, more time and effort are required to understand the conditions and drivers related to diversity, sustainability, and investment.

Our qualitative assessment work will support the development of a deeper understanding of community dynamics.

Diversity an equitable community, where diverse economic activity is reflective of a diverse population participate in the local economy

Sustainability: a resilient community and economy with diverse industries, sustainable infrastructure, and a healthy population

Investment: a productive regional economy with active businesses that have access to the capital, markets, and workforce they need to grow

UNDERSTANDING DISPARITY

Fourth Economy will perform qualitative and quantitative research on the City's demographic and economic outlook. Analysis of key city demographic, socioeconomic, labor and workforce, education, and employment development characteristics will particularly note trends among underserved communities. Based on the qualitative and quantitative research noted above, we will assess the City's present and future competitive outlook and standing against similar markets. Assessment will include an analysis of how these trends impact underserved communities.

Our team recognizes that Rancho Cordova's economic success may not have been experienced equally by its residents. To effectively address economic disparities and inequities, a community must establish a clear, data-informed baseline. Our team will leverage existing diversity and disparity indicators, such as a Diversity Index or the GINI Coefficient. In addition to indicators that can be disaggregated by race and ethnicity to identify disparities further and disproportionate impacts in Rancho Cordova, such as:

- **Educational Attainment:** How well does the education system serve different communities?
- **Employment and Unemployment:** To what degree different demographic groups can participate in economic activity?
- **Wages and Employment by Industry:** Are different demographic groups engaged in growing and high-paying industries, and are they equitably paid for their participation?
- **Median Household Income:** What are the disparities between demographic groups, and how does this impact the affordability and accessibility of housing?
- **Tenure and Cost-Burdens:** Does the local economy provide equitable rates of homeownership and housing cost burdens?
- **Business Ownership:** What are the disparities in business ownership rates for different demographic groups, and how well does ownership reflect participation in different industries?

SYNTHESIS

After an internal review of the analyses, Fourth Economy will prepare a memo of the findings that will be shared with the client and Advisory Committee to develop priorities for issues that require further research and analysis. These may include outliers from our baseline understanding or specific topics that may not be reflected in this data.

With the baseline assessment in hand, the Fourth Economy team will look ahead to the opportunities and stressors that will shape Rancho Cordova in the future. Too often, economic development strategies take a narrow view of the systems, global events, and evolving sectors, ultimately defining safe assumptions. We aim to create a plan that provides tactical recommendations without losing sight of what's to come and how to build towards changes and create future momentum. Contextualizing Rancho Cordova and the findings thus far in the project within a larger regional, state, and national understanding is an important part of this phase of work. It sets the final two stages to accomplish your stated goals.

Priority Industry Sectors

Fourth Economy examines the priority industry sectors within a community to identify industries that can fill critical gaps in the supply chains, or which align with the available workforce. Our approach is not to identify industries or companies in search of the best “deal” but those that can meet the needs of the local community.

TARGET INDUSTRY ANALYSIS

We will inventory and assess the existing industry sectors, maturity, connectedness, and value proposition to the Rancho Cordova community. We will engage with small businesses, entrepreneurs, manufacturers, and associated stakeholder groups, meeting with representatives from the Rancho Cordova Area Chamber of Commerce; leaders in the City's largest industries, developers, experts, and entrepreneurs just to name a few examples. Through interviews, online surveys, and focus groups, our team will identify and confirm key issues, opportunities, constraints, and challenges for operating in Rancho Cordova.

Fourth Economy will explore the supply chains and value chains of the industries and supporting assets in the local and regional economy to determine potential opportunities to increase and/or leverage certain opportunities for Rancho Cordova. Fourth Economy identifies critical industries based on a number of factors of strategic importance (determined in consultation with Rancho Cordova):

- **Industry Diversification** - are there industries missing in the local supply chain?
- **Living Wages** - what industries provide a sustainable quality of life?

- **Industry Growth** - do you need to slow the decline of a key industry or harness the energy of a growing industry?
- **Alignment with Regional or State Targets** - are there opportunities to leverage broader resources?
- **Areas of opportunity** – are there emerging industries that don't appear in official statistics?
- **Alignment with workforce skills and occupations** - what industries would provide opportunities for the existing workforce?
- **Tax Base Impacts** - does this industry provide an opportunity to stabilize or grow the tax base?

We define and analyze the supply chain for those industries using input-output and purchasing flow data. For unique or emerging sectors, Fourth Economy supplements this analysis with surveys or interviews where possible.

STRATEGIES AND RECOMMENDATIONS FOR BUSINESS ATTRACTION, RETENTION AND EXPANSION

The goal of the analysis above is to identify industries that are best aligned with the strategic goals of the city, and to identify their ability to really take root in the community by building the rationale for their growth and expansion in Rancho Cordova, and to maximize the spillover benefits across local and regional industry networks. The strategies should be aligned with the needs of different industries. The following graphic roughly illustrates some of the different needs at different stages of maturity:

	 Emerging	 Growth	 Maturity	 Reinvention
Economic Challenge	High capital requirements and technical risk	High operational risk and capital for expansion	Need to standardize, specialize, and automate	Outsourcing, restructuring, and reskilling
Talent Need	Skilled leaders and technical workers	High need for managers, supervisors, specialists	High need for production workers, upskilling, and retention	High need for reskilling, retention, diversification

Fourth Economy will explore a range of strategies and tools including but not limited to the following:

Strategy	Tool	Description
Business attraction	Marketing campaigns	Create and implement marketing campaigns to attract new businesses to the community.
	Site visits	Conduct site visits with potential businesses to showcase the community's assets and answer their questions.
	Networking	Attend industry events and conferences to network with potential businesses.
	Financial incentives	Offer tax breaks, grants, and other financial incentives to attract new businesses to the community.
	Streamlined regulations and technical assistance	Make it easy for businesses to operate in the community by streamlining regulations and providing supportive services.
Business retention	Leverage unique assets	Leverage unique assets, such as workforce, location, and infrastructure, to potential businesses.
	Business Calling/Outreach	Conduct regular surveys and interviews with businesses to identify and address their concerns.
	Training and Workforce Development	Provide businesses with access to training and development programs for their employees.
	Financial Assistance	Offer financial assistance and other resources to help businesses grow and expand.
Business starts and expansion	Business Planning and Consulting Services	Provide businesses with access to business planning and consulting services to help them grow and expand.
	Business and Market Development Support	Connect businesses with potential customers and partners to help them expand their markets.
	Financial Assistance	Offer financial assistance and other resources to help businesses expand their operations.
	Incubators and Accelerators	Provide early-stage companies access to mentorship, investors and other support to help them launch and grow.

Leading to the creation of an Action Plan, Fourth Economy will synthesize both the quantitative data and qualitative insights from this focused industry analysis. With a focus on building and maintaining economic resilience, our team will examine strategies to continue building high-wage industries that allow for economic mobility while also recommending diversifying the economy and growing opportunity sectors. Situating the City of Rancho Cordova within the regional economy and investing in its small businesses, entrepreneurs, Latinx population, women leaders, talented youth, and other aspirational residents and workers will help to uplift the local economy and society.

CREATE AN ACTION PLAN TO GUIDE IMPLEMENTATION

As we move into the action planning stages of the process, we will invite community leaders and engaged residents to co-create solutions through interactive workshops we call Build Sessions.

Build Sessions emphasize the focus on moving past talking about problems and toward building solutions. This process engages the stakeholders who know the issues best, and those

who will likely be involved in implementing the solutions. Engagement is critical to developing realistic solutions that have buy-in from key stakeholders.

COMMUNITY BUILD SESSIONS

Build Sessions will be organized around each of the prioritized strategy areas with at least 3 meetings for community input. For each one, we will identify Build Session co-chairs. The co-chairs will be community leaders who are domain experts in the strategy areas and will utilize their networks, with support from the Steering Committee, to engage the right participants to help develop strategies. It will be important to engage community representatives that can speak to the lived experiences related to the chosen topics.

We will develop working papers that will be shared with participants in advance of the Build Sessions. A draft version of the working papers will be shared with the co-chairs for validation and refinement. These working papers will evolve from the ecosystem mapping and stakeholder engagement, and will include:

- Ideas and insights from the community engagement efforts to date
- Supporting data and analysis
- Related strategies from existing plans
- Identification of external or internal issues related to the focus area
- If appropriate, possible scenarios that should be considered
- Examples of what other communities are successfully doing in the area of focus

Build Sessions will be organized by the prioritized strategy area and within each Build Session, breakout groups will focus on clear issues/opportunities around which to develop strategies. These will be framed as “How Might We” statements, e.g. “How Might We... better leverage our college to spur entrepreneurship”. During the Build Sessions, participants review the working papers, brainstorm and prioritize potential strategies, and then identify the actions, stakeholders, and resources required for implementation.

Though these typically occur in person, we can also deliver these sessions in a virtual yet engaging and interactive format, using Zoom and a collaboration software called XLeap. To accommodate community members unable to attend the meetings, sessions are available online afterward for broader input.

After the Build Sessions, the Steering Committee will typically review the findings and prioritize strategies based on a number of criteria including alignment with the vision and goals, and with an aim to create a balanced portfolio of easily achievable actions and bold, innovative change.

Developing the Strategic Action Plan

Each of the last three goals and phases of work will culminate in the creation of a strategic Action Plan for the City of Rancho Cordova to enact to drive growth and prosperity for The City and its residents.

In developing our recommendations, we carefully demonstrate what possible barriers may arise present to allow clients to course correct as needed. Fourth Economy will provide an action plan that defines each of the recommendations and actions the City and partners will need to implement. This information will include an estimated timeline, the resources required to implement, the possible source, and a description of potential barriers. We will also consider the location of potential geographic impacts and recognize the varying economics of the enclaves.

This Action Plan will clearly outline each goal, identify interdisciplinary strategies to advance and achieve them, set a timeline and playbook for achieving each action item, and provide metrics to measure progress and define success.

An economic benefit scoring system will allow us to prioritize the recommendations. We often create a portfolio of actions that balance potential lower impact/more time intensive recommendations against longer-term/larger benefit potential projects. We do this to build confidence in the overall plan and provide some immediate actions that can harness the momentum during and immediately after the planning process.

The successful path forward for any community moving from planning to implementation is all about well-thought-out actions and the leadership to advance them. The Fourth Economy team will culminate our engagement with the development of a suite of deliverables to support the vision of the City of Rancho Cordova as a resilient, globally competitive city where everyone can reach their full potential with recommendations centered on equitable economic development.

Project Schedule

Fourth Economy proposes a nine month timeline for completion of the project. Our experience has been that a shorter time frame does not allow for inevitable delays, and a longer time frame risks losing momentum as information becomes stale and enthusiasm wanes in the face of new priorities.

	Month	1	2	3	4	5	6	7	8	9
Rancho Cordova Overview and Engagement										
Advisory Committee		•		•		•		•		
Engagement with Council Members and City Officials	•	•								
Website Development and Communications Strategy	•	•	•	•	•	•	•	•	•	•
Broad Based Community Engagement		•	•	•	•					
Rancho Cordova Overview										
Organizational Analysis and Existing Plan Review		•	•	•						
Kick Off and Community Listening Tour	•	•	•							
Interviews	•	•	•							
Assess Competitiveness, Gaps, and Key Drivers										
Baseline Demographic and Economic Analysis	•	•	•							
Economic Competitiveness Framework		•	•	•						
Understanding Disparity		•	•	•	•					
Synthesis				•	•					
Priority Industry Sectors										
Target Industry Analysis			•	•	•					
Strategies and Recommendations for Business Attraction, Retention and Expansion					•	•				
Create an Action Plan										
Community Build Sessions						•	•			
Development Strategic Action Plan							•	•		
Deliverables and Final Strategic Plan								•	•	
Project Management/Travel										
Bi-weekly client calls	•	•	•	•	•	•	•	•	•	•
Travel		•		•			•			

Deliverables

This suite of final deliverables will answer critical questions that have been proposed, along with presenting a mix of easily-understood quantitative and qualitative analyses and insights from our community engagement processes that support the plans' strategic recommendations. These deliverables combine the insights from each of the previous three goals and will include:

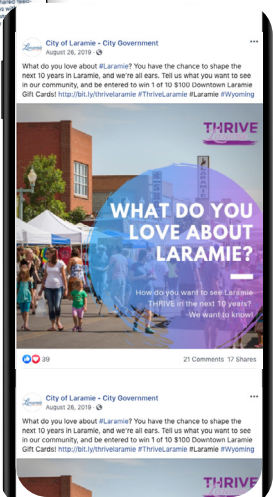
- An analysis of current economic conditions within Rancho Cordova and the surrounding environment, with a strong lens towards equitable development and the economic advancement of all residents
- A community-supported vision and a corresponding set of goals
- Strategic recommendations for investments, both financial and programmatic, to catalyze the emergence of Rancho Cordova as an exceptionally economic diverse, vibrant, and thriving residential, and commercial, and entrepreneurial center that provides pathways to prosperity to all residents builds on existing progress and preserves the community's rich heritage and legacy

Final deliverables may take the form of an infographic, formal report, presentation tools, social media graphics, or other communication tools defined by the client team.

Project Team

The Fourth Economy team includes a range of experts that demonstrate an excellent understanding of community and economic development. Resumes are included in the appendix.

- **Jerry Paytas, Ph.D., Vice President**
 - » Project Director
- **Alejandro Martinez, Senior Consultant**
 - » Project Manager
- **Maura Kay, Consultant**
 - » Analysis
- **Deminique Heiks, Consultant**
 - » Analysis and Engagement
- **Andrea Negrin, Assistant Consultant**
 - » Engagement Support
- **Justin Wheeler, Consultant**
 - » Design & Technical Communications



Cost Proposal

	Hours	Cost
Rancho Cordova Overview and Engagement		
Advisory Committee	29	\$6,025
Engagement with Council Members and City Officials	18	\$4,120
Website Development and Communications Strategy	40	\$6,550
Broad Based Community Engagement	92	\$14,005
Rancho Cordova Overview		
Organizational Analysis and Existing Plan Review	22	\$3,880
Kick Off and Community Listening Tour	32	\$7,520
Interviews	37	\$6,130
Assess Competitiveness, Gaps, and Key Drivers		
Baseline Demographic and Economic Analysis	34	\$5,960
Economic Competitiveness Framework	32	\$5,600
Understanding Disparity	30	\$5,500
Synthesis	37	\$6,280
Priority Industry Sectors		
Target Industry Analysis	47	\$7,780
Strategies and Recommendations for Business Attraction, Retention and Expansion	37	\$6,280
Create an Action Plan		
Community Build Sessions	75	\$13,590
Development Strategic Action Plan	44	\$7,760
Deliverables and Final Strategic Plan	102	\$17,360
Project Management/Travel		
Bi-weekly client calls	42	\$8,300
Travel	48	\$11,280
Total Labor	798	\$143,920
Travel		\$7,902
Expenses & Stipends		\$5,750
Total Estimated Fixed Cost Not to Exceed		\$157,572

Appendix

Economic Competitiveness and Inclusion Plan

Ramsey County Community & Economic Development

Ramsey County Community & Economic Development's (CED) focus is to improve the quality of life in their community by maintaining existing housing stock, expanding homeownership and affordable housing opportunities, installing safe infrastructure and facilities, remediating brownfields sites, redeveloping under-utilized properties, strengthening businesses, navigating economic development resources, and encouraging job growth.

CED's vision for Ramsey County is one of economic competitiveness and inclusion, where its business and talent strengths create new industry growth and all residents have access to existing and future economic opportunities. Eliminating racial disparities in employment, educational attainment and income; creating wealth for residents; addressing gaps in housing and affordability issues; and expanding the talent pool while leveraging existing partnerships, resources, and business expansion programs will help CED achieve its vision and strengthen economic outcomes for all.

OUR APPROACH

Fourth Economy led the overall plan development and coordination between the local and national sub-consultants, and helped facilitate a holistic approach to addressing the community's opportunities and challenges. Every step along the way, residents, businesses, community leaders, a steering committee, and the Ramsey County Board of Commissioners were invited to engage in the development of an implementable plan that outlines economic and community objectives to pursue over the next five years. This plan is innovative in its understanding of how current levels of poverty and disinvestment began decades ago, and its strategies prioritize inclusion in future investments and other actions related to housing, job creation, workforce development and place-based investments, while responding to the COVID-19 crisis.

THE RESULTS

The plan was adopted in 2021 and the Ramsey County team immediately began to implement the core recommendations. Over \$75M has been committed to affordable and workforce housing development, a \$5M business real estate preservation fund was created and several more recommendations have been implemented. The plan won a 2021 International Economic Development Council Award of Excellence.



LOCATION

Ramsey County, MN

PROJECT TYPE

Economic Development Plan

SCALE

County

CLIENT TYPE

Government

REFERENCE

Kari Collins
Director, Ramsey
County Community &
Economic Development
651.302.4455
kari.collins@ramseycounty.us

Comprehensive Plan

City of Allentown, PA

Fourth Economy Consulting, with support from evolveEA, was engaged by the City of Allentown, the third largest city in the Commonwealth of Pennsylvania, to create a Comprehensive Economic Development Plan.

The City of Allentown is currently experiencing a renaissance in its downtown business district, attributed to the City's Neighborhood Improvement Zone (NIZ) Tax Incentive Program. The current City Comprehensive Plan was adopted by City Council in 2009. Allentown has shifted from an industrial city to an emerging hub for office space, retail, key services, and entertainment. The updated Comprehensive and Economic Plan will reflect the dynamic nature of the city and identify a pathway for continued growth, redevelopment, and opportunity for all residents.

OUR APPROACH

In addition to the NIZ, several other factors contributed to the unique situation that drove Allentown to expand the scope of the traditional comprehensive plan. It is the anchor city of a growing region with a rapidly diversifying population. Most parcels in the city are utilized, which affects land-use decisions. And, most people who live in Allentown work outside of the city limits, indicating the need for efficient transportation, and potentially a need to add jobs in the city. The process of writing the plan includes four community meetings, eight facilitated Build Sessions (attended by over 200 people), and a community survey in both English and Spanish.

THE RESULTS

The plan was approved in the fall of 2019, and celebrated with a final community meeting. The city will be able to use the plan to coordinate with the private and nonprofit entities in the city to prioritize action and align themselves around a vision. Next steps include a revision of the outdated zoning code and a reorganization of planning processes to focus on neighborhood engagement.

The plan was recognized with a Pennsylvania Governor's Award for Local Government Excellence. The city's Vision 2030 comprehensive planning effort was determined to best exemplify the theme of "Innovative Planning and Sound Land Use Practices."



LOCATION

Allentown, PA

PROJECT TYPE

Comprehensive Plan

SCALE

City

CLIENT TYPE

Government

REFERENCE

Irene Woodward
Director of Planning and Zoning
City of Allentown Bureau of
Planning & Zoning
irene.woodward@allentownpa.gov
610.437.7611 x 2866

Economic Development Action Strategy

City of Atlantic City, New Jersey

The City of Atlantic City was a uniquely nimble public client with high aspirations to develop competitive economic strategies focusing on diversifying the economy with new industries and opportunities while continuing to leverage the tourism and entertainment industries. The client team was most interested in creating shared prosperity for all residents and creating equitable access to economic opportunities.

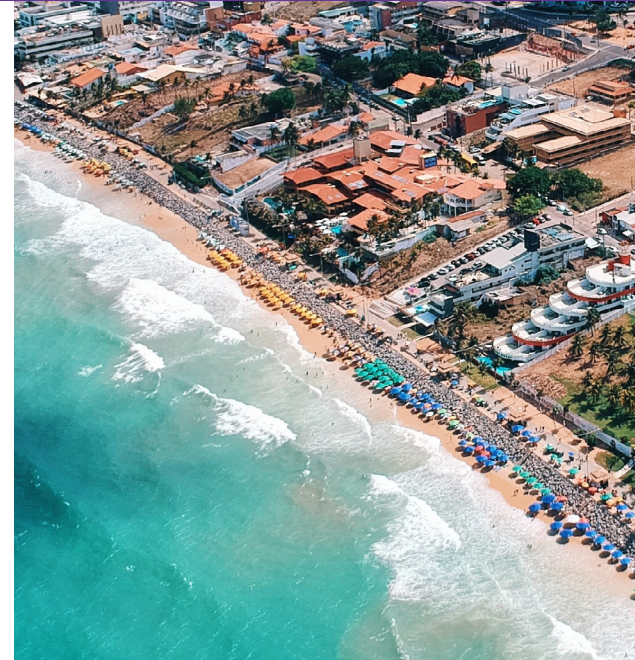
The current administration inherited a city with deep financial problems and a long history of corruption. However, over the past several years, the City has continued to develop resources, opportunities, and strategic partnerships to support the city in recovering from economic shocks from previous environmental challenges and the COVID-19 pandemic. The local economy remains highly reliant upon lower-wage sectors, like tourism and leisure, which experienced difficulty during the pandemic. While there is targeted growth in other sectors, the lack of economic diversification leaves the City vulnerable to further economic shocks. Additionally, the large waterfront hotels, resorts, and casinos stand in stark contrast to the largely underdeveloped inland areas of the city, creating a divide between the areas for tourists and locals. Moreover, the city sees little real estate development across all typologies, and developments underway are slow progress.

OUR APPROACH

The City engaged Fourth Economy to create a long-term strategic action plan to maximize growth potential and implement new or stalled community-focused economic and real estate development projects. The strategic action plan provides recommendations for projects that have the greatest potential for broad community benefit. We developed a clear action plan based on an analysis of prior planning efforts, relevant data, and broad stakeholder and resident engagement. The final plan informed strategic opportunities, provide a real estate market analysis, and identify potential avenues for focusing the flow of private capital, public funds, and economic investment.

THE RESULTS

The Economic Development Action Strategy prioritizes prosperity and creates a three-pronged approach to address it: Fourth Economy recommended interdisciplinary strategies that knit together real estate development, economic diversification, and community priorities to achieve shared prosperity. Given the findings and recommendations related to real estate development, the City and its partners at NJ Economic Development Authority (NJEDA) are pursuing a \$700k+ Phase II Government Restricted Municipalities (GRM) Grant to help advance stalled projects that have an opportunity to create up to \$14M in additional tax revenue and more than 600 jobs. Additional investments totaling over \$3M have already been allocated for additional priorities identified in the Action Strategy, such as streetscape, facade improvement, and transit and walkability infrastructure. Grant funding is also available for local entrepreneurs to help grow their business ideas and drive local growth in target industries. The City is equipped with an actionable plan to achieve its goals and track its success through identifiable metrics and continued engagement with community members.



LOCATION

Atlantic City, NJ

PROJECT TYPE

Economic Strategy

SCALE

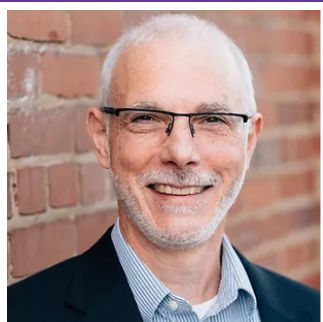
City

CLIENT TYPE

Government

REFERENCE

Jim Rutala
Principal
Rutala Associates, LLC
jmrutala@comcast.net



JERRY PAYTAS

VICE PRESIDENT

EDUCATION

University of Pittsburgh Graduate School of Public and International Affairs

Pittsburgh, PA
Ph.D., Public & International Affairs
M.A., Urban & Regional Planning

The Johns Hopkins University

Baltimore, MD
B.A., International Affairs

PRIOR EXPERIENCE

GSP Consulting

Director of Research
Pittsburgh, PA

Carnegie Mellon Center for Economic Development

Director
Pittsburgh, PA

Heinz College, Carnegie Mellon University

Adjunct Faculty
Pittsburgh, PA

Ben Franklin Technology Center

Manager of Business Services
Pittsburgh, PA

BTI Consultants

Project Planner
Coraopolis, PA

AREAS OF EXPERTISE

- Community Development
- Economic Development
- Economic Impact Analysis
- GIS Mapping
- Housing Analysis and Strategy
- Innovation-Based
Economic Development
- Modeling and Forecasting
- Outdoor Recreation Economy
- Program Design and
Implementation
- Public Policy
-

PROJECT EXAMPLES



LINK21

*Bay Area Rapid Transit (BART) and Capitol Corridor Joint
Powers Authority (CCJPA)*

Advisor

Link21 is a transportation program sponsored by the San Francisco Bay Area Rapid Transit District (BART) and the Capitol Corridor Joint Powers Authority (CCJPA) to transform Northern California's passenger rail network into a faster, more integrated system that provides safe, efficient, equitable, and affordable travel for everyone. At the core of Link21 is a new transbay passenger rail crossing between Oakland and San Francisco. Steer is overseeing the travel demand and land use consultants in development of a refined travel demand and land use tool for the Link21 program.

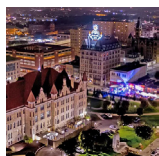


COMPREHENSIVE AND ECONOMIC DEVELOPMENT PLAN

City of Allentown, PA

Analysis Lead

Fourth Economy led a multi-consultant, multi-stakeholder project to create a joint comprehensive and economic development plan in the third largest city in Pennsylvania. Allentown is the anchor city of a growing region with a rapidly diversifying population. Most parcels in the city are utilized, which affects land-use decisions. And, a recently implemented downtown tax incentive has spurred significant development, creating a need for balance across the city. The process of writing the plan included community meetings, Build Sessions (attended by over 200 people) and a community survey in both English and Spanish.

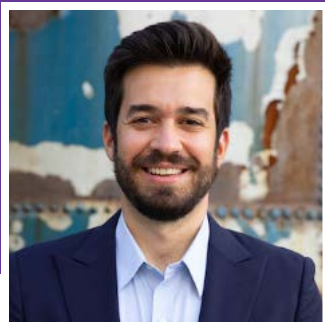


STRATEGIC ECONOMIC DEVELOPMENT PLAN

City of Scranton

Analysis Lead

Following decades of population decline and reduced tax base, the City of Scranton sought a catalytic strategic economic development plan to present a vision for the city that is forward-looking, actionable, and immediately implementable. Over the course of six months, the Fourth Economy team led a strategic planning process that included in-depth economic analysis, robust community engagement, ideation and visioning processes, surveying, and strategy development. The final plan provides pathways towards a future Scranton that offers equitable opportunities for all residents, growth and sustainability for businesses, and strength and resilience within the city's economy.



ALEJANDRO MARTINEZ

SENIOR CONSULTANT

EDUCATION

New York University

Master of Urban Planning—
Concentration: Economic
Development & Housing.
New York, N.Y.

Universidad Nacional de Lanús

Master in Sustainable Development
Buenos Aires, Argentina

Universidad de Monterrey

Bachelor of Architecture
Monterrey, Mexico

PRIOR EXPERIENCE

James Lima Planning + Development

Senior Analyst
New York, N.Y.

Manhattan Chamber of Commerce

Business Recovery Specialist
New York, N.Y.

NYC Department of Transportation

Project Associate
New York, N.Y.

City Planning Department

Director
San Pedro Garza Garcia, Mexico

AREAS OF EXPERTISE

- Economic Development
- Housing Analysis and Strategy
- Innovation-Based
Economic Development
- Modeling and Forecasting
- Placemaking
- Project Management
- Public Realm Strategies
- Real Estate Finance
and Development
- Transit Oriented Development
- Zoning

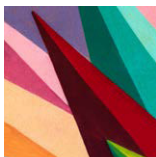
PROJECT EXAMPLES



DOWNTOWN ORLANDO'S ACTION PLAN

City of Orlando, Community Redevelopment Agency

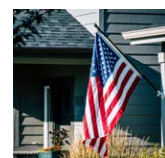
The DTO 2.0 Action Plan aims to drive tangible capital projects, programs and policies that foster a vibrant downtown. This project involved analyzing current demographics, foot traffic, and the state of office, retail, and housing sectors, including vacancy rates, and projecting future demand, as well as extensive stakeholder engagement. Following the analysis, the action plan presented a strategic vision that included actionable items related to capital projects, zoning amendments, policy and incentive redesign, and identifying catalytic sites for development. This collaborative effort involved both national and local firms and incorporated the aforementioned recommendations, along with additional mobility, public space, and cultural recommendations to revitalize the downtown area.



OMAHA INNOVATION AND ENTREPRENEURSHIP ECOSYSTEM ASSESSMENT

11th Street Enterprises

Omaha is an ideal location to establish an innovation district to continue growing its entrepreneurial ecosystem. Situated in the heart of the Midwest, Omaha benefits from its central location, allowing for easy accessibility and connectivity to major markets. The city boasts a diverse and vibrant economy with thriving finance, healthcare, logistics, and agriculture industries. Fourth Economy, along with Mass Economics and Urban Impact Advisors is conducting an assessment of Omaha's innovation ecosystem that will identify the key resources, sectors, and partnerships that can be leveraged to cement Omaha's identity as an important tech and innovation hub.



CENTRAL NEW YORK COMMUNITY INVESTMENT PRIORITIES ANALYSIS

CenterState CEO

In October of 2022 Governor Kathy Hochul and semiconductor manufacturer Micron announced one of the largest economic development projects in U.S. history — a 20-year, \$100 billion investment by Micron to build a cutting-edge semiconductor manufacturing campus in Onondaga County, New York. In conjunction with this project, a \$500 million community investment fund will see investments made across the five-county region. On behalf of Syracuse-based CenterState CEO, Fourth Economy is conducting deep engagement and analysis to establish a framework for directing this investment into several key priority areas. The final document will be informed by direct community involvement and shape investments for years to come.



MAURA KAY

CONSULTANT

EDUCATION

Carnegie Mellon University
H. J Heinz III College of Information
Science and Public Policy
 Pittsburgh, PA
 M.S, Public Policy and Management

University of Pittsburgh
 Pittsburgh, PA
 BPhil, Urban Studies and
 Political Science

PRIOR EXPERIENCE

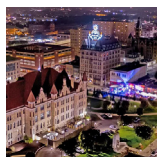
Neighborhood Allies
 Program Research Associate
 Pittsburgh, PA

Rebuilding Together Pittsburgh
 House Captain
 Pittsburgh, PA

AREAS OF EXPERTISE

- Community Engagement
- Cultural Planning
- Data Analysis and Visualization
- Diversity, Equity, and Inclusion Strategy Implementation
- Economic Development
- Entrepreneurship and Small Business Development
- GIS Mapping
- Main Street Strategy
- Resiliency Planning
- Workforce Analysis in Emerging Industries

PROJECT EXAMPLES



STRATEGIC ECONOMIC DEVELOPMENT PLAN

City of Scranton

Analysis Support

Following decades of population decline and reduced tax base, the City of Scranton sought a catalytic strategic economic development plan to present a vision for the city that is forward-looking, actionable, and immediately implementable. Over the course of six months, the Fourth Economy team led a strategic planning process that included in-depth economic analysis, robust community engagement, ideation and visioning processes, surveying, and strategy development. The final plan provides pathways towards a future Scranton that offers equitable opportunities for all residents, growth and sustainability for businesses, and strength and resilience within the city's economy.



INCLUSIVE RECOVERY STRATEGY TECHNICAL ASSISTANCE

New Growth Innovation Network (NGIN)

Analysis Support

The Inclusive Recovery Initiative, launched by New Growth Innovation Network (NGIN) supports economic development organizations to embed inclusive economic recovery strategies into their regional plans. Fourth Economy was engaged for technical assistance, providing direct support and analytics to six Economic Development Organizations to help them understand the existing economic disparities in their regions, how those disparities have been exacerbated by the pandemic, and to develop strategies to address those disparities.



BLACK-OWNED BUSINESS SUPPORT ECOSYSTEM

Prosper

Analysis Lead

Prosper, a Birmingham coalition of community, civic, and business leaders committed to creating a more vibrant, racially and gender-inclusive economy, tasked Fourth Economy with examining the ecosystem supporting Black-owned businesses, including its participants, strengths, weaknesses, and the areas of opportunity for impact. Our team engaged in analysis of the economy, industries, and small business trends; built relationships through interviews with business owners, stakeholders, and community members to uncover trends and insights; and hosted a series of facilitated discussions to engage the community in the co-creation strategies to advance economic equity in Birmingham. The final plan is expected to launch in Spring 2023.



DEMINIQUE HEIKS

CONSULTANT

EDUCATION

Bowling Green State University
Bowling Green, OH
Master of Public Administration

University of Toledo

Toledo, OH
M.A. Criminal Justice

Kent State University

Kent, OH
B.S. News - Broadcast Journalism

PRIOR EXPERIENCE

**BGSU Center for
Regional Development**
Senior Project Manager
Bowling Green, OH

**BGSU Center for
Regional Development**
Economic Development
Program Coordinator
Bowling Green, OH

Wood County Planning Commission
Planner
Bowling Green, OH

AREAS OF EXPERTISE

- Community Engagement
- Comprehensive Economic Development Strategies
- Data Analysis and Visualization
- Economic and Social Justice
- Economic Development
- Economic Impact Analysis
- Project Management
- Strategic Planning

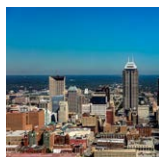
PROJECT EXAMPLES



LINK21

Bay Area Rapid Transit (BART) and Capitol Corridor Joint Powers Authority (CCJPA)

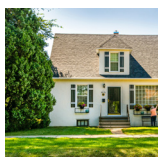
Link21 is a transportation program sponsored by the San Francisco Bay Area Rapid Transit District (BART) and the Capitol Corridor Joint Powers Authority (CCJPA) to transform Northern California's passenger rail network into a faster, more integrated system that provides safe, efficient, equitable, and affordable travel for everyone. At the core of Link21 is a new transbay passenger rail crossing between Oakland and San Francisco. Steer is overseeing the travel demand and land use consultants in development of a refined travel demand and land use tool for the Link21 program.



STATE OF INDIANA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)

Indiana Economic Development Corporation

Fourth Economy is providing the state, its regions, and local communities with a roadmap and action plan for economic growth and prosperity over the next decade. This plan will leverage existing economic development efforts and strengths across the state, while addressing weaknesses to help the Hoosier state become more resilient in the face of economic downturns, and disruptive industry trend. Our work includes a deep dive into the socioeconomic data and a robust stakeholder engagement process — including interviews with industry leaders, government officials, and local topical experts; focus groups with targeted community members; surveys with broader economic development professionals; and a leadership committee comprised of public, private, and nonprofit leaders — that will culminate in a public comment period.



HOUSING PROGRAM ANALYSIS & RECOMMENDATIONS

Indiana Association of Realtors

Research Lead

Fourth Economy led an analysis of the various programs that support housing development finance and housing ownership/ rental programs in Indiana. These include loans, tax credits, grants and subsidies. In addition to examining state and federal programs, Fourth Economy profiled other best in class states on how they are investing in housing. We compiled promising practices that states are utilizing to serve affordable and market-rate housing development, homeownership, and renter supports. Our review resulted in recommendations within policy, regulation, and investment that can support housing development and impact the affordability/ quality of existing housing stock in the state.



ANDREA NEGRÍN

CONSULTANT

EDUCATION

Florida International University
Miami, FL
B.A. Development Economics

PRIOR EXPERIENCE

City of Miami Springs Adult Community Center
Assessment Specialist
Miami, FL

Logos Capital
Private Equity + Impact Investment Analyst
Miami, FL

Lotus House Women and Children's Shelter
Legal and Clinical Intern
Miami, FL

AREAS OF EXPERTISE

- Community Engagement
- Community Development
- Community Connections
- Resource Compilation, Organization, and Sharing

PROJECT EXAMPLES



COMMUNITY HEALTH ASSESSMENT, COMMUNITY HEALTH IMPROVEMENT PLANS

Allegheny County Health Department

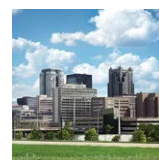
The Allegheny County Health Department (Pittsburgh, PA) serves more than 1.2 million county residents. Its mission is to protect, promote, and preserve the health and well-being of all Allegheny County residents, particularly the most vulnerable. In September of 2017, the health department became a nationally accredited public health department. As a part of the re-accreditation process, every five years the health department must complete an update to the community health assessment and community health improvement plan to ensure that priority health concerns of the communities served are being addressed and progress is being made on previous goals set forth. Andrea has assisted with research, planning, and administration in support of this project.



SURPRISE IN THE SUBURBS

Jefferson Regional Foundation

The Jefferson Regional Foundation (JRF) focuses on the communities in the southern suburbs of Allegheny County with a mission of health and wellness for all. These communities encompass a range of conditions (urban, suburban, and rural) that each face unique challenges. These communities are growing, and growing more diverse, which may require a realignment of services and resources within the foundation's service area. Fourth Economy is developing a series of Issue Briefs, Surprise in Suburbs, to identify emerging trends that may impact the service providers supported by JRF.



BLACK-OWNED BUSINESS SUPPORT ECOSYSTEM

Prosper Birmingham

Fourth Economy is developing a report that will identify best practices to support the acceleration of Black-owned businesses in Birmingham, AL, understand the full scope of the current ecosystem, and explore opportunities to foster collaborations and partnerships that will help these businesses. Andrea's work on this project revolves around creating resource matrices, extensive desktop research, and ecosystem map development for businesses and organization that support black businesses in Birmingham.



JUSTIN WHEELER

CONSULTANT

EDUCATION

Brooks Institute of Photography
Santa Barbara, CA
B.A., Commercial Photography and
Digital Imaging

Maryland Institute College of Art
M.P.S. Data Analytics and
Visualization

PRIOR EXPERIENCE

The Pennsylvania State University
Graphic Designer, Proposal Specialist
Strategic Interdisciplinary Research
Office
University Park, PA

**The Xerces Society for Invertebrate
Conservation**
Web Manager, Communications
Admin.
Portland, OR

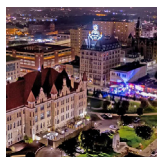
Wheeler Creative Services
Marketing Strategist
State College, PA

The Pennsylvania State University
Multimedia Specialist
Department of Materials Science and
Engineering
University Park, PA

AREAS OF EXPERTISE

- Branding
- Data Analysis and Visualization
- Data Management
- Qualitative Data Collection
and Analysis
- Qualitative Research
- Graphic Design
- Marketing and Communications
- Writing and Editing

PROJECT EXAMPLES



STRATEGIC ECONOMIC DEVELOPMENT PLAN

City of Scranton

Design & Communications Lead

Following decades of population decline and reduced tax base, the City of Scranton sought a catalytic strategic economic development plan to present a vision for the city that is forward-looking, actionable, and immediately implementable. Over the course of six months, the Fourth Economy team led a strategic planning process that included in-depth economic analysis, robust community engagement, ideation and visioning processes, surveying, and strategy development. The final plan provides pathways towards a future Scranton that offers equitable opportunities for all residents, growth and sustainability for businesses, and strength and resilience within the city's economy.

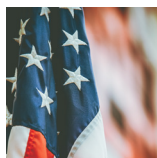


ECONOMIC COMPETITIVENESS STRATEGIC PLAN

City of Chester, PA

Design & Communications Lead

Chester was once a prosperous industrial hub until factories closed post-WWII, and has since suffered from a long history of fiscal distress and economic challenges. The Fourth Economy team developed a strategy around community engagement, economic analysis, and priority focus areas with the goal of creating an implementable economic development strategy and action plan.



ECONOMIC MOBILITY REPORT

National Governors Association

Design Lead

The National Governors Association, with support provided by the Rockefeller Foundation, engaged Fourth Economy to develop a menu of data-driven, human-centered, sustainable policies to advance economic security, mobility, and resiliency for low-income individuals and families. We worked with a State Advisory Committee to ensure recommended policies are innovative, feasible, and non-partisan.



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Pittsburgh, PA 15217
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www.fourtheconomy.com



PROPOSAL FOR PROFESSIONAL SERVICES

Economic Development Strategic Plan and Implementation Plan



Submitted to:

CITY OF RANCHO CORDOVA, CALIFORNIA

SUBMITTED BY:



THE NATELSON DALE GROUP, INC.
YORBA LINDA, CA • www.natelsondale.com
O: 714.692.9596 • F: 714.692.9597

In Association with:

Paul M. Saldana, CEcD
Exeter, CA

October 6, 2023

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Cover Photo Credit: “The City of Rancho Cordova, located along a six-mile stretch of the beautiful American River, is an emerging urban center with a small-town feel.” by RanchoCordovaExpert – Own work. Licensed under CC BY-SA 4.0 via Wikimedia.com –

https://upload.wikimedia.org/wikipedia/commons/c/c0/City_of_Rancho_Cordova_American_River.jpg

A. COVER LETTER

The Natelson Dale Group, Inc.
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Yorba Linda, CA 92886
(714) 692-9596 phone / (714) 692-9597 fax
E-mail: dale@natelsondale.com
www.natelsondale.com

October 6, 2023
#7652

City of Rancho Cordova
Attention: Amanda Norton
Economic Development Department
2729 Prospect Park Drive
Rancho Cordova, CA 95670

Dear Ms. Norton:

In response to the City's request for proposals (RFP), The Natelson Dale Group, Inc. (TNDG) is extremely pleased to submit this proposal to prepare an Economic Development Strategic Plan (EDSP) and Implementation Plan for the City of Rancho Cordova. Our team for this submission includes our close affiliate Paul Saldana (dba Economic Growth Strategies).

The Natelson Dale Group, Inc. (TNDG) is a national economic consulting firm established in California in 1974. Our practice focuses largely on the planning and implementation of economic and workforce development programs. The firm's work often involves direct linkages between a community's industry attraction plans and its real estate development potentials. In this regard, we have a strong understanding both of local real estate markets and of the larger regional economic trends that drive demand for commercial and industrial land use.

In addition to our long track record in economic development strategic planning, TNDG also maintains an active role in supporting California's economic development community and advancing best practices within the profession. In this regard, the firm (in 2018) took the lead on behalf of the California Association for Local Economic Development (CALED) and the California Academy for Economic Development (CAED) on the implementation of a California-specific training and certification program for economic development professionals (the "ACE" program launched in 2019). The firm's Managing Principal (Roger Dale) currently teaches the annual course on economic development strategic planning as part of the ACE program. This course includes a substantial focus on inclusive economic growth.

Paul Saldana of Economic Growth Strategies has both a consulting background and extensive hands-on experience as an economic development practitioner. His impressive career includes stints as Director of Economic & Community Development for the City of Bakersfield (2021-2023) and President and CEO of the Tulare County Economic Development Corporation (2001-2020). Based on his experience managing large economic development organizations and his intimate familiarity with corporate site selection processes,

PROPOSAL FOR ECONOMIC DEVELOPMENT STRATEGIC PLAN

The Natelson Dale Group, Inc.

he would support the TNDG team on the following key aspects of the assignment: the organizational analysis (identifying potential funding sources and partnerships); the target industry analysis; and the marketing elements of the Implementation Plan. He would also be a principal participant in our stakeholder outreach effort.

Understanding of the Work Scope. The TNDG Team understands that this process will result in a detailed Economic Development Strategic Plan and actionable Implementation Plan guiding the City's economic development programming over the next three years. To achieve this result, our overall approach to the assignment will include a balanced mix of:

- Background research and technical analysis by the consultant team;
- An extensive and highly-inclusive stakeholder engagement process;
- Appropriate integration of the City's existing economic, community and workforce development programs (including relevant regional initiatives);
- Close coordination with City staff throughout the planning effort; and
- Preparation of an action-oriented strategic plan that reflects Rancho Cordova's unique market opportunities, stakeholder consensus on priorities, and our team's intimate familiarity with contemporary best practices for inclusive economic development.

The specific tasks proposed for each component of the work scope are outlined in Section C of our proposal. In addition to the EDSP and Implementation Plan, we will provide a final project report fully documenting the team's multi-faceted community outreach program (and other post-contract reporting specified in the City's RFP).

Corporate Information. The Natelson Dale Group, Inc. is an S Corporation incorporated in the State of California. I am the individual authorized to contractually bind the firm and I hereby commit to the obligations contained in this proposal. By signing and submitting this proposal, we agree to adhere to the provisions described in the City's RFP. We are committed to entering into a binding contract if selected for the assignment.

We very much appreciate your consideration of our team and sincerely hope we have the opportunity to serve the City of Rancho Cordova on this exciting project.

Respectfully submitted,



Roger Dale
Managing Principal

B. RELEVANT EXPERIENCE AND REFERENCES

The Natelson Dale Group, Inc. (TNDG) brings exceptional experience in economic development strategic planning to this assignment. From this work, TNDG has developed nationally recognized expertise in the following key areas: 1) Target Industry Strategies and Cluster Development, 2) Retail Demand Analysis and Tenant Recruitment, 3) Integration of Economic Development with Workforce Development, and 4) Structuring of Local and Regional Economic Development Partnerships. The firm's work often involves direct linkages between a community's industry attraction plans and its real estate development potentials.

An abbreviated summary of TNDG's project experience is provided below, followed by more detailed descriptions of three assignments especially relevant to Rancho Cordova.

Economic Development Strategies		
<u>Counties</u>	<u>Cities</u>	
Guilford County (North Carolina)	Anaheim	Kyle (Texas)
Kern County	Antioch	Los Angeles
Larimer County (Colorado)	Arvin	Meniffee
Los Angeles (San Gabriel Valley subregion)	Bakersfield	Ontario
Osceola County (Florida)	Beaumont	Palm Desert
San Bernardino	Burbank	Phoenix (Arizona)
San Diego (South County Subregion)	Camarillo	Pinole
San Joaquin County	Canyon Lake	San Francisco
Sonoma County	Carson	San Ramon
Ventura County	Coachella	Santa Fe Springs
Yuma County (Arizona)	Compton	Simi Valley
<u>Indian Tribes</u>	Coronado	Stockton
Agua Caliente (Palm Springs)	El Cajon	Tracy
Cahuilla (Riverside County)	Escondido	Ventura
Yavapi-Apache (Arizona)	Fresno	Vista
	Garland (Texas)	
<u>Larger Regions</u>		
Hampton Roads (Virginia) Region (5 counties and 9 independent cities)		
Tri-cities Area of Northeast Tennessee/Southwest Virginia		

General Plan Economic Studies	
City of Agoura Hills	City of Malibu
City of Alhambra	City of Monterey Park
City of Arroyo Grande	City of Ontario
City of Calabasas	City of Port Hueneme
City of Bakersfield	City of Redondo Beach
City of Beaumont	City of Rialto
City of California City	City of San Bernardino
City of Chino	City of San Clemente
City of Costa Mesa	City of San Ramon
City of Fontana	City of Santa Fe Springs
City of Garden Grove	City of Santa Monica
City of Lake Elsinore	City of Santa Paula
City of La Quinta	Siskiyou County
City of Los Angeles	Ventura County

Three Key Projects with Client References

<u>Carson, California: Economic Development Strategic Plan (2023).</u> TNDG has just finalized an economic development strategic plan for the City of Carson in the South Bay area of Los Angeles County (the plan was adopted by the City Council on September 19, 2023). This process included a comprehensive demographic/SWOT analysis; target industry/cluster analysis; market demand studies for retail, office, industrial, entertainment, and hotel development; extensive stakeholder outreach; and preparation of a detailed 5-year Action Plan.	
Similarities / Relevance to Rancho Cordova: • Similar population size (92,000) • Diverse economic base/industry mix • Underserved/underinvested communities • Substantial focus on diversity, equity, inclusion • Opportunity to leverage strategic position relative to larger metro area	Client Reference: John Raymond, Assistant City Manager City of Carson 701 E. Carson Street Carson, CA 90745 (310) 952-1773 jraymond@carsonca.gov
Link to Work Product: https://carson.legistar.com/LegislationDetail.aspx?ID=6348223&GUID=2524AF28-9497-420F-973F-E1D8FF303DE9&Options=&Search= (Note that this work was part of a larger contract led by RRM Design Group; TNDG took the lead on the EDSP and related stakeholder outreach while RRM focused on design/environmental aspects of the assignment)	

Bakersfield, California: Economic Development Strategic Plan (2021). TNDG led an 18-month strategic

planning process for the City of Bakersfield, with a focus on identifying major “game-changing”

investments the City could pursue with available state and federal recovery funding. TNDG’s work was

completed in close coordination with the regional “Better Bakersfield, Boundless Kern” (B3K) initiative

facilitated by The Brookings Institution. TNDG’s work included an industry cluster analysis,

commercial/industrial real estate market studies, and a comprehensive stakeholder outreach process

(including specific engagement with the development community, industry stakeholders, and downtown business/civic leaders).

Note: TNDG team member Paul Saldana was directly involved in this EDSP process (in his capacity at the time as the City of Bakersfield’s Director of Community and Economic Development). He was also actively involved in the initial implementation of the EDSP (essentially structuring a new department and program around the EDSP recommendations).

Similarities / Relevance to Rancho Cordova:

- Diverse economic base/industry mix
- Underserved/underinvested communities
- Substantial focus on diversity, equity, inclusion
- Focus on leveraging State and Federal funding
- Regional partnerships key to implementation

Client Reference:

Christian Clegg, City Manager
 City of Bakersfield
 1600 Truxtun Avenue, 5th Floor
 Bakersfield, CA 93301
 661-326-3751
cclegg@bakersfieldcity.us

Link to Work Product:

<https://content.civicplus.com/api/assets/319bac29-84be-4383-8d85-dc79f5122da9>

<u>Menifee, California: Comprehensive Economic Development Strategy (2019).</u> TNDG completed a Comprehensive Economic Development Strategy (CEDS) for the City of Menifee. The six-month planning process included a detailed analysis of the community’s economic development assets and opportunities, as well as its current deficiencies and challenges. The background analyses included a target industry study focused on defining potential growth opportunities within the larger Riverside County/San Diego County economy. Given Menifee’s large population of out-commuting high-skilled workers, the industry cluster analysis emphasized potential connections to regional high-tech sectors. The City of Menifee has made tremendous progress in implementation of the CEDS over the past 4 years (this progress has been documented in Annual Performance Reports prepared by TNDG for submission to the U.S. Economic Development Administration). The City has won several CALED awards on the basis of its successful implementation of the CEDS.	
<i>Similarities / Relevance to Rancho Cordova:</i> • Newer City (incorporated 2008) • Similar population size (110,000 in 2023; about 75,000 at time of incorporation in 2008) • Underserved/underinvested communities • Opportunity to leverage strategic position relative to larger metro area(s) • Regional partnerships key to implementation • Dual focus on quality of life and job creation	<i>Client Reference:</i> Gina Gonzalez, Economic Development Director City of Menifee 29844 Haun Rd, Menifee, CA 92586 (951) 723-3711 ggonzalez@cityofmenifee.us
<i>Link to Work Product:</i> https://www.menifeebusiness.com/wp-content/uploads/2020/03/Comprehensive-Economic-Development-Strategy-City-of-Menifee-CA-9-11-19.pdf	

C. WORK PLAN

TNDG's proposed scope of work for this assignment is outlined below.

A. *Project Overview Meetings*

Kickoff meeting. The TNDG Team will facilitate a virtual kickoff meeting with key City staff to review the overall work scope and project schedule; identify any existing City documents/resources relevant to the process; establish protocols for team communications; begin to identify key stakeholders to include in the outreach effort; and refine the stakeholder engagement strategy (TNDG's initial recommendations are outlined below, but it is our expectation that this approach would be further customized to reflect the City's unique preferences).

City Department interviews. Within a month of project initiation, TNDG team members will conduct initial onsite reconnaissance in Rancho Cordova. During this visit, TNDG will conduct interviews with Economic Development Staff and other relevant City Departments.

City Council work session. Approximately 8 weeks into the contract, TNDG will conduct a work session with the Rancho Cordova City Council. This timing will allow TNDG to compile initial background data (to facilitate a more meaningful discussion with the City Council), but it will still be early enough in the process to allow for subsequent tasks/decisions to be guided by the Council's input.

B. *Organizational Analysis*

TNDG team member Paul Saldana will lead the organizational analysis, drawing on his 30+ years of experience as an economic development practitioner (with significant focus on managing regional partnerships and developing organizational funding resources). For Rancho Cordova, he will conduct a review of the City's existing funding sources and partnerships and recommend strategies to expand these resources based on current funding opportunities at the federal, state and regional levels.

C. *Citywide Demographic and Economic Analysis*

To support and contextualize the subsequent technical studies, TNDG will compile background information from a range of public and private data sources including the following:

- U.S. Census / American Community Survey (ACS)
- Sacramento Area Council of Governments (SACOG)
- Sacramento County Assessor's Office
- California Department of Finance (DOF)
- California Department of Tax and Fee Administration (CDTFA)
- California Employment Development Department (EDD)
- U.S. Bureau of Labor Statistics (BLS)
- Commercial/industrial real estate market data (CoStar)
- EMSI/Lightcast (for existing and projected employment, by detailed industry and occupation)

Where appropriate, demographic and economic data will be evaluated at multiple levels of geography (city, county, and state) to allow for comparison of local conditions to reference-area benchmarks. In addition, TNDG will customize the study geographies to reflect Rancho Cordova's strategic market relative to the surrounding region.

D. *SWOT Analysis*

TNDG will prepare a comprehensive strength-weakness-opportunity-threat (SWOT) analysis to guide the subsequent strategy formulation tasks. The SWOT analysis will be based in part on direct input from key local stakeholders. As such, the SWOT review will be closely coordinated with the initial stages of TNDG's stakeholder outreach process.

The SWOT summary will quantify Rancho Cordova's potentials for quality economic growth, based on the following information sources: the baseline data compiled in Tasks B and C; input from stakeholders; and the consultant team's longstanding knowledge of economic development "best practices." The SWOT summary will consider the following issue categories:

- Geographic setting (including topography, climate, resources, etc.)
- Proximity to larger economic regions
- Demographic makeup (existing and projected)

- Workforce availability and skill levels (for the City and the larger “commute shed” region)
- Workforce commute patterns
- Education system
- Existing economic base (i.e., mix of industry types)
- Existing land use conditions and available land for development/redevelopment
- Infrastructure conditions and capacity (including broadband service)
- Housing availability and affordability
- Quality of life
- Community image
- Resident/community attitude towards growth
- Economic development partnerships (public and private)
- Economic development incentives

E. Target Industry Analysis

TNDG’s target industry analysis would include the following steps:

1. Identify and review documentation for regional and partner-led industry targeting efforts (e.g., The 50 Economic Alliance, Greater Sacramento Economic Council, etc.).
2. Complete city-level “cluster” analysis to identify candidate industries for Rancho Cordova. This analysis will include the following steps:
 - a. Compile detailed data (6-digit NAICS code level) on current and recent historic employment in the City.
 - b. Evaluate the City’s comparative strengths relative to the larger Sacramento region, utilizing standard economic analysis techniques such as location quotient and shift-share analysis.
 - c. Evaluate City’s linkages to relevant regional industry clusters.
 - d. Conduct a supply chain analysis to determine what businesses are purchasing outside of the region and look for opportunities to bring in new businesses to serve these needs.

F. Business Attraction, Retention and Expansion Efforts & Strategies Analysis

In tandem with the target industry analysis, the TNDG Team will comprehensively review the City’s existing programs and partnerships related to business retention, expansion and attraction, and compare them to

existing investment levels of a set of “peer cities” (up to 5 jurisdictions – to be mutually determined by TNDG and City staff). Based on this review of best practices, TNDG will recommend updated strategies for Rancho Cordova (specifically oriented to the target industries identified in Task E above).

G. Economic Development Strategic Plan and Actionable Implementation Plan

The TNDG Team will integrate the findings and strategic implications from all preceding tasks into a detailed Economic Development Strategic (EDSP) and actionable Implementation Plan for Rancho Cordova. The EDSP/Implementation Plan will provide a detailed blueprint for the City’s economic development programming over the next 3 years, with recommendations for attracting, strengthening, and sustaining the identified set of target industries and implementing other strategies. The Implementation Plan will be organized in terms of the following elements:

- ❖ **A Marketing Framework** for the City’s Economic Development program, including recommended tactics and “selling points” for business attraction, entrepreneurial development, and site-specific real estate development opportunities.
- ❖ **Strategy for Business Retention/Expansion/Attraction and Entrepreneurial Development** reflecting the specific industry clusters and market segments identified in the technical analyses. The target industry strategy will include the following components: Specific recruitment targets; Workforce development strategies oriented to the needs of the priority industry clusters; Recommendations regarding physical infrastructure improvements and other “capacity building” issues relevant to the targeted industry clusters; Recommended marketing framework for a cluster-based strategy (potentially in tandem with regional marketing initiatives); Strategies for supporting and encouraging entrepreneurship and innovative activities within targeted industry clusters.
- ❖ **Specific Recommendations for Leveraging Key Regional Initiatives and Resources** within the City’s overall development and business attraction efforts.

- ❖ A strategy to address **Foundational Elements**, including: 1) recommendations regarding physical infrastructure improvements and other “capacity building” issues affecting the viability of the target clusters, 2) integration of existing assets such as educational and workforce development systems, and 3) recommended measures to ensure the City’s “business friendliness” (reflecting key competitiveness issues identified in the proceeding tasks).
- ❖ Specific **Recommendations for Economic Incentives** the City could utilize to attract targeted development and business types.
- ❖ A **Prioritization Matrix** indicating the potential timing of the various action items, and identifying the specific projects and programs that would provide the best leverage of available resources.
- ❖ Recommended **Staffing/Organizational Structure** for the City’s economic development programming.
- ❖ Estimated **Budgets for New/Expanded Programs** recommended by the EDSP.
- ❖ A **Responsibility Matrix** indicating the entities who would most appropriately be tasked with carrying out various action items (including collaborating regional agencies and private sector “partners”).
- ❖ A **Monitoring Program** to track the implementation of the Plan and to refine strategy objectives over time. The monitoring program will include performance-based “metrics” utilizing readily available data sources.

H. Stakeholder / Community Engagement

TNDG’s proposed stakeholder/community engagement process will include the following components:

- A series of three (3) workshops with an ad hoc EDSP Committee (to be organized for this project, chosen to be representative of the community in terms of private business mix, geographic subareas, demographic diversity, and institutional partnerships);
- Two (2) community workshops, including one (1) oriented toward residents and one (1) oriented toward business stakeholders;
- Online surveys of the business community and the general public (promoted through the City’s social media platforms);
- Presentation of the final EDSP/Implementation Plan to the Rancho Cordova City Council for consideration and approval; and
- As-needed coordination meetings with City staff.

Example of innovative roll-out presentation

The TNDG team uses a variety of modalities for communicating strategic recommendations to city officials and their constituencies. As an example of an innovative presentation of a strategic plan, the following link provides a pre-recorded (13-minute) video presented (by TNDG Principal Roger Dale) to the Antioch, CA City Council:

<https://www.antiochca.gov/economic-development/economic-development-strategic-plan/>

D. PROJECT SCHEDULE

The TNDG Team would complete this assignment within approximately nine (9) months of authorization, per the schedule on page 14.

E. DELIVERABLES

The deliverable work products for this assignment are outlined in the table below.

Task	Work Products
A. Project Overview Meetings	Summary meeting notes
B. Organizational Analysis	Memorandum report
C. Demographic and Economic Analysis	Memorandum report (with tabular summaries of data sets)
D. SWOT Analysis	- Draft report - Final Report
E. Target Industry Analysis	- Draft report - Final report (combined report for Tasks E and F)
F. Business Attraction, Retention and Expansion Efforts & Strategies Analysis	
G. Economic Development Strategic Plan and Actionable Implementation Plan	- Draft EDSP - Final EDSP - Final project report (summarizing community outreach, demographic diversity of participants, and data sources used for contract)
H. Stakeholder / Community Engagement	- Summary of stakeholder input by meeting - Tabulation of online survey responses

F. PROJECT TEAM

The following professional staff would be assigned to this project:

- Roger Dale, Managing Principal of TNDG
- Paul Saldana, CECd, Economic Growth Strategies (subcontractor to TNDG)
- Joe McClure, Senior Associate of TNDG
- Alan Levenson, Senior Associate of TNDG
- Joe Collins, Research Associate of TNDG

An organizational/staffing chart is provided on page 15 of this proposal. Team member resumes are provided in Appendix A.

G. COST PROPOSAL

The TNDG Team would complete the proposed scope of work for a total fixed fee of \$128,830 (ONE HUNDRED AND TWENTY-EIGHT THOUSAND, EIGHT HUNDRED AND THIRTY DOLLARS). The breakdown this budget in terms of consultant hours by task (and hourly rates by team member) is estimated as follows:

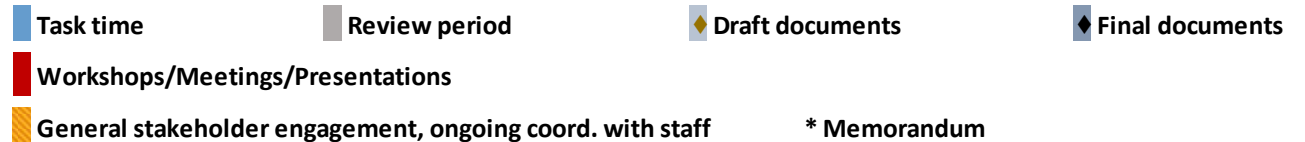
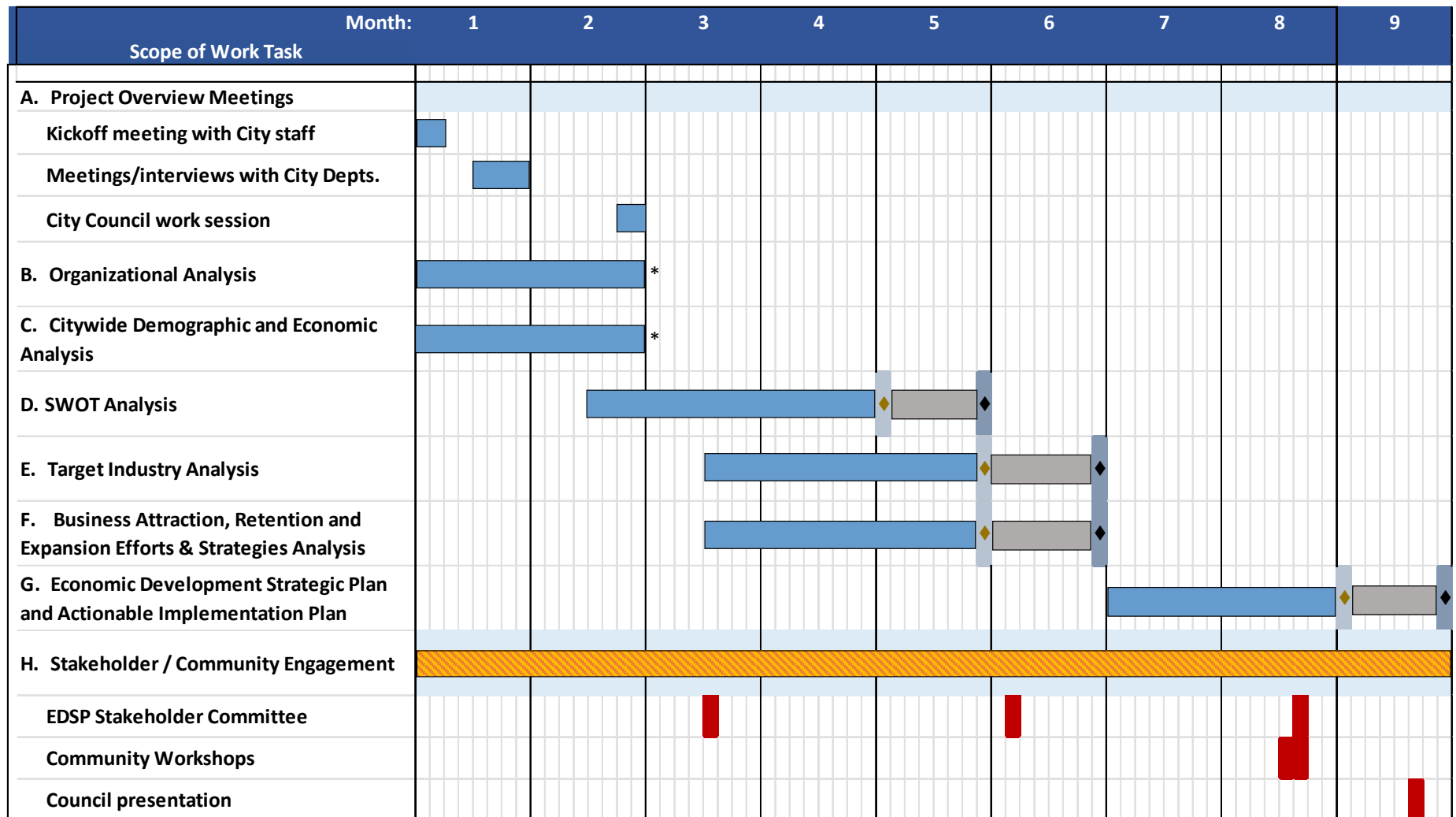
Hourly rates ---►	\$265 Dale	\$265 Saldana	\$210 McClure	\$210 Levenson	\$140 Collins	Costs
Work Scope Element	Hours					
<i>A: Project overview meetings</i>	12	12	-	-	-	\$6,360
<i>B: Organizational analysis</i>	12	32	-	-	-	\$11,660
<i>C: Demographic & economic analysis</i>	10	-	10	20	40	\$14,550
<i>D: SWOT analysis</i>	12	12	12	-	24	\$12,240
<i>E: Target industry analysis</i>	16	24	-	50	-	\$21,100
<i>F: Business attraction, retention and expansion</i>	8	12	12	-	-	\$7,820
<i>G: EDSP / Implementation Plan</i>	40	20	40	-	-	\$24,300
<i>E: Stakeholder/community engagement</i>	40	20	20	20	-	\$24,300
Sub-totals, Professional Fee	150	132	94	90	64	\$122,330
Expenses:						
Travel						\$4,000
Data						\$2,500
Total Cost						\$128,830

ITEM 3.1.

ATTACHMENT 4

Proposed Schedule of Work

Rancho Cordova, Economic Development Strategic Plan and Implementation Plan The Natelson Dale Group, Inc. Team

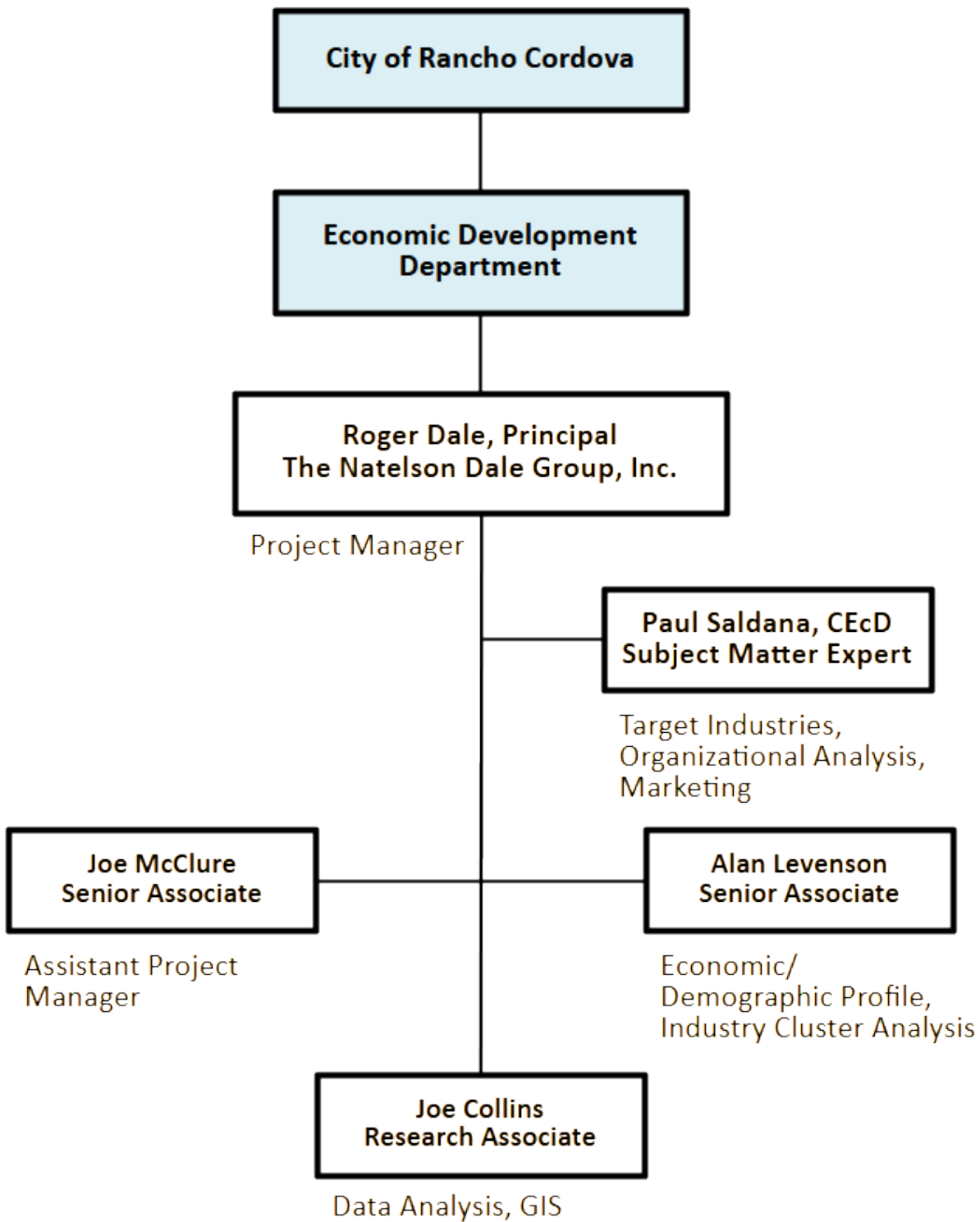


PROPOSAL FOR ECONOMIC DEVELOPMENT STRATEGIC PLAN

The Natelson Dale Group, Inc.

Project Staffing and Organization

Economic Development Strategic Plan and Implementation Plan



APPENDIX A – TEAM MEMBER RESUMES

Roger Dale, MANAGING PRINCIPAL • TNDG

Overview. Roger Dale has been affiliated with The Natelson Dale Group, Inc. (TNDG) since 1988 and serves as the firm’s managing principal. His background encompasses the fields of real estate development, economic development, regional economic analysis, environmental and land use policy, and renewable energy. His project experience includes real estate market forecasting, fiscal impact analysis, business retention/attraction, and preparation of regional-scale economic development strategic plans. He has prepared real estate forecasts for municipal planning efforts throughout California and Arizona. Mr. Dale has also prepared market and financial feasibility analyses for private developers. Key projects include a 4,200-acre subdivision in Moorpark, California; an 885-acre mixed use development on the Big Island of Hawaii; a tourist-oriented retail/restaurant complex in Honolulu; several regional shopping centers in southern California; a 3,200-unit residential development in the Santa Clarita Valley; and a master planned community in Yokohama, Japan.

Mr. Dale has completed numerous fiscal impact analyses and developed customized software models to enable municipalities to assess the fiscal impacts of proposed general plan amendments, annexations, and individual development projects.

Over the past 25 years, a significant focus of Mr. Dale’s work has been on the development of cluster-based economic and workforce development strategies. In this regard, he has managed industry cluster analyses and developed related retention/ expansion/attraction plans for the following clients: the cities of Anaheim, Los Angeles, and Burbank, and San Buenaventura, California; the County of Kern, California; the County of Yuma, Arizona; the High Desert Regional Economic Development Authority (San Bernardino County, California); the Forward Greensboro (North Carolina) Economic Development Partnership; and the Tri-Cities (Tennessee/Virginia) Economic Development Alliance.

Mr. Dale has an active interest in environmental mitigation and habitat conservation planning. For many years he has served on the board of an environmental nonprofit accredited by the Land Trust Alliance. For six years, Mr. Dale served on a technical review team for the Northern and Eastern Colorado Desert Coordinated Management Plan, a multi-agency land use planning effort led by the U.S. Bureau of Land Management.

Reflecting his longstanding interest in sustainability issues, he serves on the Board of the Roberts Environmental Center – a leading publisher of global climate change research and the nation’s foremost analyst of corporate sustainability reporting. He has recently completed feasibility studies and related economic development strategies for solar energy projects in California, Arizona, and China. He has prepared more than 50 economic analyses as part of environmental impact reports, pursuant to the requirements of the California Environmental Quality Act (CEQA).

Education. Mr. Dale received his B.A. cum laude in Economics from Claremont McKenna College in Claremont, California. He also holds a master’s degree in Resource and Environmental Economics from the University of California at Riverside. Mr. Dale has also completed certification for “Real Estate Climate Action, Risk Assessment, Resilience, Net Zero Success” through the Harvard Graduate School of Design’s executive education program.

Representative Project Experience in Economic Development Strategic Planning (all projects managed by Roger Dale): (projects are shown by client name followed by project name)

- Kern County, California: Analysis of Potential Economic Benefits of Carbon Management Industry (2023)
- Sonoma County, California: Comprehensive Economic Development Program Review (2022)
- Antioch, California: Economic Baseline and Strategic Plan (2022)
- Bakersfield, California: Economic Development Strategic Plan (2021)
- Vista, California: Economic Development Strategic Plan (2021)
- Menifee, California: Comprehensive Economic Development Strategy (2019)
- Beaumont, California: Economic Development Strategic Plan (2019)
- San Bernardino, California: Comprehensive Economic Development Strategy (CEDS) for IVDA/SBIAA (2018)
- Camarillo, California: Economic Development Strategic Plan (2018)
- Palm Desert, California: Economic Development Strategic Plan (2018)
- Ventura County, California: Economic Vitality Strategic Plan (2017)
- Larimer County (Fort Collins), Colorado: Economic Development Asset Assessment (2016)
- Kyle, Texas: Target Industry Study and Economic Development Strategic Plan (2015)
- Yuma, Arizona: IMCP Strategic Plan (2014)
- Garland, Texas: Target Industry Strategy (2014)
- Escondido, California: Economic Development Master Plan (2013)
- Osceola County, Florida: Economic Diversification Strategy (2012)
- Los Angeles, California: Economic Development Strategy for Solar LA (2009)
- Northeast Tennessee/Southwest Virginia: Target Industry Analysis (2006)
- Ventura, California: Business Plan for “Eco Industry” Industrial Park (2003)
- The National and Regional Directory of Targeted Growth Industries (2002)
- Greensboro (Guilford County), North Carolina: Industry Attraction Strategy (2001)

Alan Levenson, SENIOR ASSOCIATE • TNDG

Overview. Mr. Levenson brings to The Natelson Dale Group, Inc. an academic background in economic theory with particular emphasis on economic development. Prior to joining the firm, Mr. Levenson spent two years as a research consultant for NEMESIS (Núcleo de Estudos Modelos Espaciais Sistêmicos), which is a research network dedicated to the study of systemic spatial models of the Brazilian economy.

A significant focus of Mr. Levenson's work at TNDG has been on preparing regional economic impact analyses for a wide range of projects. Among others, these projects have included a major regional health care facility in Riverside, CA, a technology and education park in Tustin, CA, a business park in Victorville, CA, and a highway construction interchange project in Pima County, AZ. These analyses have involved modeling various projects' short-term (construction-phase) and permanent (annually recurring) benefits to the regional economy. The benefits have been summarized by estimating a project's impact on total gross output, value added, earnings, and employment in the region. As part of this work, Mr. Levenson has experience with the major economic impact modeling software packages, including the Bureau of Economic Analysis's Regional Input-Output Modeling System (RIMS) and the Minnesota Implan Group's IMPLAN program.

Mr. Levenson has managed the preparation of a number of regional economic development plans, with a particular focus on industry "cluster" strategies. This work has involved a wide range of activities: from performing quantitative/ statistical analysis to more qualitative analysis, including conducting numerous interviews with key players of potential clusters. Mr. Levenson has participated in industry cluster studies for the following clients: the Forward Greensboro (North Carolina) Economic Development Partnership, the Tri-Cities Tennessee Cluster Study (Tennessee), the Yuma Private Industry Council (Arizona), and the City of San Buenaventura (California).

Education. Mr. Levenson joined TNDG after receiving his B.A. with honors in Economics and Political Science from the University of California at Riverside. Mr. Levenson's undergraduate studies included additional coursework in applied mathematics related to economic analysis. He also holds a Master's in Business Administration degree, with a concentration in Real Estate Finance, from UCLA's Anderson School of Management.

Representative Project Experience in Economic Development Strategic Planning (Alan Levenson served as Project Associate): (projects are shown by client name followed by project name)

- Kern County, California: Analysis of Potential Economic Benefits of Carbon Management Industry (2023)
- Antioch, California: Economic Baseline and Strategic Plan (2022)
- Bakersfield, California: Economic Development Strategic Plan (2021)
- Vista, California: Economic Development Strategic Plan (2021)
- Menifee, California: Comprehensive Economic Development Strategy (2019)
- Beaumont, California: Economic Development Strategic Plan (2019)
- Camarillo, California: Economic Development Strategic Plan (2018)
- Palm Desert, California: Economic Development Strategic Plan (2018)
- Stockton, California: Economic Development Strategic Plan (2015)
- Kyle, Texas: Target Industry Study and Economic Development Strategic Plan (2015)
- Yuma, Arizona: IMCP Strategic Plan (2014)

PROPOSAL FOR ECONOMIC DEVELOPMENT STRATEGIC PLAN

The Natelson Dale Group, Inc.

- Escondido, California: Economic Development Master Plan (2013)
- Osceola County, Florida: Economic Diversification Strategy (2012)
- Yuma County, Arizona: Workforce and Economic Development Summit (2001, 2011)
- Los Angeles, California: Economic Development Strategy for Solar LA (2009)
- Northeast Tennessee/Southwest Virginia: Target Industry Analysis (2006)
- Anaheim, California: Industry Location Analysis and Attraction Strategy (2005)
- Ventura, California: Business Plan for “Eco Industry” Industrial Park (2003)
- The National and Regional Directory of Targeted Growth Industries (2002)
- Greensboro (Guilford County), North Carolina: Industry Attraction Strategy (2001)

Joseph McClure, SENIOR ASSOCIATE • TNDG

Overview: Joe McClure has served as principal or in other key roles in land economics research and advisory-services organizations for over 35 years. During this period, Joe's practice has focused on the following outputs:

- Economic development strategic focus: consolidating views on a region's economic development targets, workforce, issues, and approaches, integrating target industries into the local economy, and relating a region's existing economic base to its competitive region.
- Market analyses with fiscal and strategic components: highest and best use analysis, analysis of rapidly growing trade areas, cash flow and development strategy analysis, fiscal benefits of development.
- Fiscal/economic analyses with a strategic component: impacts on the business community and tax receipts from freeway and other road projects, and assessing redevelopment prospects of under-performing areas.
- Special research projects, including studies of local labor forces and employer-employee relations, economic impacts of bicycle recreation, and transit behaviors and opinions in rural regions.

Mr. McClure's multidisciplinary background incorporates many phases of the community and real estate development process: economic analysis and strategy development, market and financial feasibility assessment, and planning and design. Joe has a M.S. in Urban Planning, in a program that emphasized regional economics, from the University of Arizona and completed additional postgraduate work in economic geography at UA. He has a B.S. in Architecture from the University of Cincinnati. Mr. McClure is a registered architect in Arizona and a member of the Western Regional Science Association (WRSA)—an international group of economic geographers, the Urban Land Institute (ULI), and the Arizona Association for Economic Development (AAED). He has presented papers on business and economic development issues at economic development conferences, has served as Adjunct Lecturer at the University of Arizona in the Geography and Regional Development program, and on ULI Advisory/Technical Services Teams. McClure served as a Civil Engineering Officer in the U.S. Air Force.

Education: Joe has an M.S. in Urban Planning, in a program that emphasized regional economics, from the University of Arizona and completed additional post graduate work in economic geography at UA. He has a B.S. in Architecture from the University of Cincinnati.

Representative Project Experience in Economic Development Strategic Planning

Note: *please also see all projects managed by Roger Dale listed within his resume, above, for J. McClure experience):*

Some additional projects of Joe McClure his *that are not already mentioned elsewhere in this proposal* include:

ULI Technical Assistance Panels (2017, 2019). For ULI Arizona Technical Assistance Panels, McClure joined a group of planners, architects, engineers, and developers researching conditions related to generating alternatives to revitalizing the 32nd Street Corridor in Phoenix north of Shea Boulevard, and for revitalizing Downtown Eloy, Arizona.

Market Assessment and Benefits Analysis for CityScape, a Downtown Phoenix Destination Retail Center (2015 and prior). Estimated fiscal benefits to a participating jurisdiction from major redevelopment project

that considerably boosted the potential for Downtown Phoenix to be a destination for office and commercial activity.

Identification and Review of Key Economic Development Influences, Town of Florence (2020).

Documented a wide range of economic, development, demographic, and tourism data as a background to preparing an initial assessment of the Florence economy in relation to the surrounding region, including Pinal County and parts of metro Phoenix and Tucson.

Market and Economic Development Feasibility Study for Navajo Nation FBFA Area (2018). Analysis to determine the commercial development potential of a nine-chapter region and several specific site areas, through a market demand analysis of multiple trade areas. Project included evaluation of tourism activity and potential, including transportation access and linkages with regional destination attractions. (As IDS+A team member).

Economic Impacts of Bicycling in Arizona, for AZ Department of Transportation (2013). McClure Consulting was prime contractor for this project, which involved a variety of research processes including contacting all bicycle dealers and bicycle event and tour operators in Arizona, compiling primary and secondary data on sales, event details, etc. and estimating expenditures by out-of-state visitors to AZ. Estimating process included compiling state and national-level data on sales patterns, tourist spending, and other details.

Transit in Greater Arizona, for the Arizona Department of Transportation (2017). McClure Consulting was prime contractor for this project, which involved multiple research steps including an in-depth survey of households in Greater Arizona, and inventory of transit providers, and an online survey of providers, and an extensive literature review and compilation of information relevant to a future state transit plan.

Smart Transportation Guidebook, for the Arizona Department of Transportation (2014). McClure Consulting was a subcontractor for this project, providing input on economic considerations related to various transportation planning, policy, and infrastructure issues. The project included extensive research focused on literature pertaining to these issues.

Joe Collins, ASSOCIATE • TNDG

Overview: Joseph Collins serves as a Research Associate for TNDG. Over the years, his professional career has involved him in a variety of both private and public projects in the Midwest and Southwest US. His varied experience includes: fiscal and land economic feasibility analysis, geospatial and descriptive data analytics, graphic presentation, market analysis, and the practice of urban planning and development, as summarized below.

- Market Analysis of Greater Phoenix Metropolitan Area for Industrial, Multifamily, Office, and Retail Real Estate Inventory.
- Analyzing required development improvements and associated costs pertaining to large tracts of land planned for single-family residential subdivisions and planned industrial pad sites.
- Analyzing costs/benefits of single-family residential development versus various commercial development options within municipalities.
- Analyzing the costs/benefits of annexation of established residential subdivisions.
- Conducting land use analysis and absorption studies, and real estate appraisal and market analyses.
- Geospatially analyzing building, property, land use, zoning, parking, traffic, demographic, economic, financial, tax, and other associated qualitative/quantitative data for various projects.
- Developing a Geographic Information System (GIS) relational parcel database for various properties located in a downtown area.
- Providing graphic support in the creation of various reports, exhibits, presentations, and other associated media used to present to the public, various boards and commissions, city councils, non-profit associations, and private clients.
- Providing project coordination for the creation of an interactive website for departmental customer service.
- Conducting research and technical analysis to evaluate findings and/or to take action on various real estate development applications, land use decisions, and processing other regulatory actions associated with the development of real estate.
- Designing marketing and relocation packages for potential businesses looking to purchase and/or lease property.
- Reviewing construction plans for conformance with applicable city regulations, policies, and requirements.

Certain elements of the work described above were accomplished through the following entities, in addition to his experience with TNDG:

- Downtown Partnership of Hutchinson, Kansas
- Dan Weir Real Estate Company, CCIM
- City of Olathe, Kansas
- City of Scottsdale, Arizona
- Valuation and Advisory Services, CB Richard Ellis

Education: Mr. Collins obtained a M.B.A. from Grand Canyon University in Phoenix, Arizona, a M.S. in Regional and Community Planning from Kansas State University in Manhattan, Kansas, and a B.S. in Geography/Community Planning from Kansas State University. In addition, he has completed coursework for general real estate appraisal at the Arizona School of Real Estate and Business in Scottsdale, Arizona.

Paul M. Saldana, CEcD**Overview**

Paul Saldana has served as an economic and business consultant and an economic development practitioner, leading city, county, and regional economic development organizations, along with various academic roles in the economic/economic development field. He is responsible for 16 national, state, and regional awards for economic development programs and has received numerous individual recognitions for professional achievement and advocacy.

Education

- ❖ *California Baptist University*, Doctor of Education, Organizational Change & Administration (ABD 9/24)
- ❖ *Crown College*, Master of Business Administration (4.0 GPA)
- ❖ *Crown College*, Bachelor of Science, Business Administration (With Distinction – 4.0 GPA)

Certifications & Credentials

- ❖ *International Economic Development Council*, Certified Economic Developer (CEcD)
- ❖ *California Commission on Teacher Credentialing*, Career Technical Education Credential
- ❖ *California Commission on Teacher Credentialing*, Substitute Teaching Credential

Professional ExperienceEconomic & Business Consultant

dba Economic Growth Strategies, November 2020 to Present, Selected engagements:

- **Small Business Advisor:** Structure and deliver technical assistance to small business clients, including business planning, marketing, and financial management.
- **Economic Development Strategic Plan:** Completed a regionwide economic development strategy for a city in the southern US, home to a major university and historic downtown features.
- **Comprehensive Economic Development Strategy:** Prepared the 5-year CEDS (EDA funded) for a California Indian Tribe, including a target strategy and tribal business opportunities analysis.
- **Airport Target Market Analysis:** Developed a target industrial analysis, marketing strategy and land use concepts for a special-district-owned airport in Southern California, with a focus on advanced aeronautics and UAV technologies.
- **Pandemic Economic Recovery & Resiliency Plan:** Prepared an economic recovery and resiliency plan for multi-county region in California, with update to the current CEDS.
- **Recovery & Resilience Strategies for Pandemics:** Provided technical assistance in the development of a regional economic resilience program in rural Washington state.
- **Tourism Destination Marketing Strategy:** Prepared a destination analysis and marketing strategy for an historic community in Louisiana. Strategy included action steps and anticipated outcomes.

Director, Economic & Community Development Department. City of Bakersfield (CA) June 2021 to May 2023

Selected Experience Highlights: Led the establishment and organization of the new department. Directed the completion of the City's Economic Development Strategic Plan, Affordable Housing Strategy and Transformative Climate Communities Plan. Managed budget of \$107 million and a staffing complement of 32.

President & Chief Executive Officer. Economic Development Corporation, Tulare County, CA, January 2001 to November 2020

Selected Experience Highlights: Led the nonprofit organization to international accreditation and national acclaim. Formulated site selection proposals for companies, including analysis of demographic, socioeconomic, consumer, business, and workforce data, resulting in the creation of thousands of new jobs for residents. Engineered the achievement of federal and state designations, including enterprise/incentive zone, opportunity zone, tourism welcome center and small business loan programs.

Director, Community & Economic Development Department, City of Atascadero, CA, February 1998 to January 2001

Managing Director, Shafter Community Development Agency. City of Shafter, CA, 1992 to February 1998

Deputy Director/Economic Development Consultant. County of Placer, Office of Economic Development (Auburn, CA) January 1991 to December 1992

Economic Development Director/SBDC Director. Inland Empire Economic Council (Ontario, CA) September 1989 to July 1991

Managed the business recruitment and marketing effort for multi-county organization, including providing site selection services for national and international clients. Created and managed the Inland Empire Small Business Development Center and staffed the Global Trade Association.

Academic Experience

Faculty Member, Finance & Economics, School of Business. Fresno Pacific University (Fresno, CA) July 2021 to present

Adjunct Faculty, School of Business. Crown College (Saint Bonifacius, MN) July 2020 to August 2021

Assistant Director/Faculty Member. CETYS University (Baja California, MX) 2004-2009.

Faculty Member, Economic Development Institute. University of Oklahoma, 1999-2005

Selected Professional Development

- ❖ *Planning for Economic Recovery*, International City Managers Association
- ❖ *Digital Economic Development University*, Certified Digital Economic Developer
- ❖ *California Tax Education Council*, California Registered Tax Preparer Certification
- ❖ *Johns Hopkins University*, COVID-19 Contact Tracing Certificate
- ❖ *International City Managers Association*, Planning for Economic Recovery Program
- ❖ *Ernst & Young*, Site Selection: Corporate Location in Today's Rapidly Changing Environment
- ❖ *National Development Council*, Economic Development Finance & Credit Analysis
- ❖ *Industrial Development Research Council (IDRC)*, Site Selection & Location Analysis

ECONOMIC DEVELOPMENT STRATEGIC PLAN AND IMPLEMENTATION PLAN

A PROPOSAL FOR THE CITY OF RANCHO CORDOVA
ECONOMIC DEVELOPMENT DEPARTMENT



DUE OCTOBER 6, 2023, 4:00 PM LOCAL



October 6, 2023

Amanda Norton, Economic Development Manager
City of Rancho Cordova Economic Development Department
2729 Prospect Park Drive
Rancho Cordova, CA 95670

Dear Ms. Norton:

TIP Strategies is pleased to present our proposal for the preparation of a three-year citywide economic development strategic plan and implementation plan for the City of Rancho Cordova. As you evaluate proposals, we invite you to consider the advantages of our team.

TIP is a privately held corporation established in 1995. We have completed more than 500 strategic planning engagements in 44 states. As a result of our work with the City of San Luis Obispo, Greater Sacramento Economic Council, REACH, and East Kern County, we understand California's economic and regulatory landscape. Our team has also worked in suburban communities across the US as part of our partnership with the National League of Cities (including Kansas City, Phoenix, and Dayton areas).

Using our successful three-phase Theory Into Practice model, we will deliver a strategic plan and an implementation roadmap that further strong and inclusive economic growth in Rancho Cordova. This Discovery-Opportunity-Implementation approach combines TIP's data-driven perspective with the latest thinking on the challenges and opportunities that clients face. Our goal is to leave in place actionable strategies that can survive political and economic cycles as well as changes in leadership.

Our team is excited by the prospect of working with you. As the authorized representative and project lead, I confirm that sufficient resources and time are available and can be committed to this project.

Please reach out at 512.343.9113 or jeff@tipstrategies.com if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jeff Marcell', is written over a light blue horizontal line.

Jeff Marcell, Senior Partner

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TIP is an Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

RELEVANT EXPERIENCE

TIP Strategies, Inc. (TIP) is submitting this proposal to assist the City of Rancho Cordova Economic Development Department (City) with an economic development strategy and implementation plan. Our team members are experienced in 1) leading economic development planning; 2) structuring effective and sustainable organizations; 3) identifying target industries and designing marketing strategies to recruit them; 4) crafting talent retention, development, and attraction strategies; and 5) assisting with the implementation of economic development plans for cities, counties, regions, and states.

FIRM OVERVIEW AND LEADERSHIP

TIP is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives. Leaders across the US have embraced our Talent-Innovation-Place framework, resulting in innovative, publicly supported strategies.

TIP is led by four principals ideally suited to assist the City. They are joined by a staff of analysts and consultants experienced in managing large, complex projects.

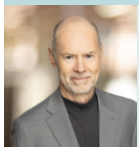
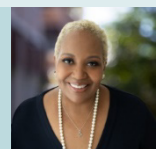


TOM STELLMAN | CEO/FOUNDER

As developer of TIP's Talent-Innovation-Place model, Tom has helped clients identify sustainable strategies to promote workforce and economic health.

TRACYE MCDANIEL | PRESIDENT

As a widely recognized strategist, Tracye has earned a reputation for creating mutually beneficial partnerships across a broad spectrum of industries.

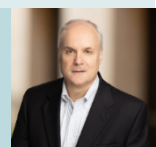


JON ROBERTS | MANAGING PARTNER

Jon is a nationally recognized leader in regional economic development. He has overseen projects throughout the US, as well as in Europe and Asia.

JEFF MARCELL | SENIOR PARTNER

Jeff leads high-profile engagements from a practitioner's point of view informed by his time leading the Economic Dev. Council of Seattle and King County.



THE TIP ADVANTAGE

TIP's national portfolio of consulting engagements spanning more than two decades, combined with hands-on program management experience, provides our team with a unique perspective.

- ▶ **WE HAVE WORKED IN CALIFORNIA.** TIP is currently preparing a comprehensive economic development strategy for REACH (Santa Barbara and San Luis Obispo Counties). Past work includes a strategy for the City of San Luis Obispo, strategic board facilitation for the Greater Sacramento Economic Council, and a diversification plan for East Kern County.
- ▶ **WE UNDERSTAND STRATEGIC PLANNING IN METROPOLITAN AREAS.** TIP has worked with clients across the US to creatively address the unique challenges and opportunities that face communities in metropolitan areas. For example, we assisted inner-ring cities surrounding Kansas City, Missouri-Kansas; Phoenix, Arizona; and Dayton, Ohio; with economic development strategies as part of our work for the National League of Cities. Other current and recent work includes strategic planning for the Greater Baltimore Committee (Maryland); Auburn, Washington (Seattle area); Lake County, Illinois (Chicago area); North Miami and Clearwater, Florida (Miami and Tampa Bay areas); and Arlington, Pasadena, and Georgetown, Texas (Dallas-Fort Worth, Houston, and Austin areas).
- ▶ **WE ARE COMMITTED TO EQUITY.** TIP helps design strategies with under-resourced populations at the center. We are helping Dallas, Texas, establish a new organization to lead inclusive economic development; recently stood up an equity-focused department for Harris County, Texas, and prepared an [inclusive growth analysis](#) for the Chicago Metropolitan Agency for Planning (Illinois).
- ▶ **WE HAVE A TEAM OF EXPERIENCED ANALYSTS.** Our research team is well-versed in analytical techniques and innovative approaches to provide clients with the information they need for decision-making. Our [data visualization tools](#) are widely cited.
- ▶ **WE ARE EXPERT FACILITATORS.** Our team has decades of experience engaging diverse stakeholders in person and virtually, balancing competing interests, and identifying shared goals. Our

recent work includes helping two cohorts of the International Economic Development Council Equity Communities initiative address diversity, equity, and inclusion in their planning and service delivery.

- ▶ **WE HELP OUR CLIENTS ACHIEVE RESULTS.** TIP collaborates with clients to identify metrics and determine if strategies are working or need adjustment. Our strategic plans have helped the [City of Auburn, Washington](#), attract aerospace and advanced manufacturing businesses, and contributed to the Northeast Indiana Regional Development Authority winning \$50 million in state funding.
- ▶ **WE KNOW WHAT DRIVES INVESTMENT.** Our team helps clients capitalize on assets. We are engaged by the Texas Higher Education Foundation to prepare a statewide strategy for technology innovation and commercialization. Our experience extends from laying the groundwork for innovation districts in [Fort Worth, Texas](#), to facilitating the creation of co-working spaces in [Green Bay, Wisconsin](#). We understand the factors that drive investment—including the available workforce, the presence of well-prepared industrial sites, a climate of innovation, and a quality of place that supports retention/recruitment. This Talent-Innovation-Place framework guides our engagements.

In short, hiring TIP to lead your strategy process will result in 1) a shared vision for economic resilience; 2) clear strategies to support the vision; and 3) an actionable plan for moving forward.

SELECTED WORK AND REFERENCES

The following are examples of TIP's work. Please see our online [portfolio](#) for additional information.

GREATER SACRAMENTO ECONOMIC COUNCIL (CA) | BOARD FACILITATION

Faced with trends accelerated by COVID-19, the Greater Sacramento Economic Council (GSEC) engaged TIP to facilitate the discussion and review of the organization's draft action plan. TIP designed a survey for the 80-member board and facilitated three Board sessions that featured survey findings and a discussion of the draft plan. Feedback identified two additions: the clarification of GSEC's role in state policy and the need to reimagine marketing to retain remote workers and recruit their employers. TIP facilitated the Board review and approval of edits, and presented trends likely to impact future work.

REFERENCE: Danielle Casey, President, Albuquerque Regional Econ. Alliance (former EVP, GSEC) | 201 3rd NW, Ste. 1900, Albuquerque, NM 87102 | PH 505.705.3785 | dcasey@abq.org

CITY OF SAN LUIS OBISPO, CA | ECONOMIC DEV. STRATEGIC PLAN UPDATE

Contending with local challenges, systemic barriers, and macro-level concerns and trends, the City of San Luis Obispo engaged TIP in 2022 to update its economic development plan. The process included an interactive data visualization; interviews, focus groups, and a survey that garnered nearly 1,000 responses; an assessment of the City's current efforts; prioritization of catalyst projects; and a review of best practices. Five principles emerged: 1) maintaining a dynamic economic and business environment, 2) expanding economic opportunities for all, 3) ensuring economic vitality through climate- and system-focused growth, 4) enhancing collaboration, and 5) expanding partnerships. TIP also provided an implementation matrix and a memorandum of potential actions for the City's DEI office.

REFERENCE: Lee Johnson, Economic Dev. Manager, City of San Luis Obispo | 990 Palm Street, San Luis Obispo, CA 93401 | PH 805.781.7100 (main) | ljohnson@slocity.org

REACH (CALIFORNIA CENTRAL COAST) | RESILIENCE ROADMAP

REACH (San Luis Obispo and Santa Barbara counties) hired TIP to facilitate a five-year comprehensive economic development strategy (CEDS) planning process with guidance from a Strategy Committee and community input. The CEDS aimed to bolster the region's capacity, investments, and economic resilience by focusing on three goals. First, the people goal emphasized preparing talent for local job opportunities through career pathways. The innovation goal centered on cross-sector partnerships to stimulate economic growth in target sectors. Lastly, the place goal called for the creation of a regional housing and infrastructure coalition to address housing barriers for the workforce. TIP also provided an evaluation framework and a matrix to monitor implementation progress.

REFERENCE: Julie Sinton Pruniski, VP of Strategic Initiatives, REACH | PO Box 13201, San Luis Obispo, CA 93406 | PH 805.779.1060 | julie@reachcentralcoast.org

WORK PLAN

We have an established approach to strategic planning. In our years of leading projects across the US, our three-phase Theory Into Practice (TIP) planning model—Discovery, Opportunity, Implementation—has proven flexible enough to address the variety of challenges our clients face and aligns well with the requested scope of work. Staff named on page 13 will contribute to each phase detailed in this section.

1. DISCOVERY

We begin by reviewing available materials, visiting with knowledgeable sources, and conducting a targeted analysis of relevant trends to create a common foundation for the planning process.

1.1 PROJECT LAUNCH. At the outset of the engagement, we focus on establishing clear expectations and effective communication, which is the cornerstone of a successful project.

- ▶ **Kickoff meeting.** The meeting provides the opportunity to discuss objectives, define success, identify stakeholders and partners, formalize the outreach strategy, and review expectations.
- ▶ **Council work session.** We will facilitate a Council work session to define the scope of project, recommendations, and intended outcomes.
- ▶ **Team meetings.** TIP will collaborate and coordinate with appropriate staff and leadership during the engagement. The timing of meetings and reporting updates (including the final report detailed on page 11 of the RFP) will be decided upon during the launch.
- ▶ **Steering committee.** If an oversight group is not already in place, we can assist with forming a steering committee that is representative of current economic development efforts. Members are responsible for attending meetings, providing input, and reviewing deliverables.

1.2 ORGANIZATIONAL ANALYSIS. We will work with the client to ensure that we have a foundational understanding of the network, policies, priorities, and benchmarks that will influence the planning process. Findings will be expanded upon in later tasks and help inform recommendations.

- ▶ **Policies.** Examining current federal, statewide, and regional economic development

strategies, initiatives, and programs (e.g., Sacramento Region Community Economic Resilience Fund, Greater Sacramento Region Prosperity Strategy, Greater Sacramento Economic Council) will ensure we build on existing knowledge.

Relationships. A scan of the partner network will help define existing relationships within the regional market and identify potential partnerships.

- ▶ **Priorities.** Discussions with the appropriate staff will ensure our team has a full picture of the City's economic development initiatives and core functions. This will likely include interviews with Economic Development and other key City departments.
- ▶ **Benchmarks.** To ascertain Rancho Cordova's competitive position, we will benchmark the City against an agreed upon number of local, national, and international programs that serve similar communities. We will compile available organizational and programmatic information.

1.3 CITYWIDE BASELINE ANALYSIS. Our analysts will prepare a targeted assessment of factors (e.g., demographic, socioeconomic, labor and workforce, educational and employment development) that define the City's competitiveness. The analysis will be tailored to meet project objectives and take advantage of available data resources. This task will consider the City's current economic position and identify broader economic trends that may impact its economic future. Focus will be placed on the understanding of differential performance across the Rancho Cordova's underserved communities. Where possible, we will look at data disaggregated by ethnicity and race.

1.4 STAKEHOLDER ENGAGEMENT. We design a custom input process that engages the diverse voices, provides meaningful information, raises awareness of economic issues, and builds support for the outcome of the planning process. We encourage inclusive participation by holding a combination of in-person and virtual events and employing tools like Mentimeter, Zoho, and Zoom.

- ▶ **Roundtables & interviews.** While the final list of stakeholders will be determined in coordination with the City, we anticipate 8 to 10 roundtables that include nonprofits, government agencies,

business leaders, major real estate brokers, developers, educational institutions, and utility providers. The goal will be to have productive discussions that generate information about trends, barriers, opportunities, and assets. Where appropriate, sessions will be supplemented by interviews to solicit feedback on issues that may not surface in a collective setting.

- ▶ **Public townhalls.** TIP will facilitate three townhalls to engage a larger group of stakeholders. These sessions will provide additional insight into issues effecting communities. Townhalls can be conducted in English and Spanish, as agreed upon during the project launch.
- ▶ **Interactive tools.** To expand participation, we can facilitate the use of social media, online surveys, and other interactive tools that will help gather anecdotal information about assets and challenges and increase buy-in among the broader community.
- ▶ **Public workshop.** TIP will analyze findings from engagement actions, outlining concerns, opportunities, and future needs. Our consultants will then conduct a public workshop with the City Council to present and discuss findings from the analysis. The work session will provide the Council and the community a chance to engage and offer feedback.

TIP will prepare materials and facilitate discussion. Logistics (e.g., arranging locations, advertising sessions, and providing translation services) would be addressed in partnership with the client.

- 1.5 COMPETITIVE POSITION.** We will use qualitative and quantitative findings to summarize the City's national and regional competitive position. In addition to strengths, weaknesses, opportunities, and threats that emerge, our analysis will highlight factors that differentiate the area from the competition, particularly in the context of future trends. The results will suggest opportunities, highlight trends impacting underserved communities, and help drive subsequent tasks.

2. OPPORTUNITY

Building on our Discovery phase findings and a review of best practices, we identify which opportunities are likely to have the greatest potential for success.

- 2.1 STRATEGIC DIRECTION.** Working closely with the client, we will ensure the City's vision and mission

statements align with the strategic direction that emerges from Discovery. In addition, we will help craft guiding principles that embody the goals and objectives of the planning process. This step will provide a framework that points to recommended actions and establishes priorities.

2.2 TARGET INDUSTRY ANALYSIS. TIP's analysts will provide a current industry snapshot that will help the City prioritize key sectors for growth and expansion.

- ▶ **Occupational structure.** We will use employment data by occupation to analyze the regional workforce, review growth trends, and identify regional strengths. A review of current job postings in the region will be used to identify the positions existing employers are currently trying to fill and to capture data on the skills and certifications required.
- ▶ **Posting analytics.** For each target, we then analyze US job postings from the most recent 12-month period. This approach differs from an industry-occupation staffing matrix, which can be dated and unclear as to where hiring demands are tightest. Carefully selected samples of recent job postings allow us to identify a target's most sought-after occupations and specialized skills in (near) real-time. We then analyze the region's workforce readiness for targeted investments and pose strategic questions about the alignment of the talent pipeline with employer needs.
- ▶ **Industry alignment.** We will explore the alignment of identified occupational strengths with the needs of target industries and major employers in the region. Using an equity lens, TIP's analysis also documents patterns of occupational participation by race, ethnicity, gender, and age. Living wage thresholds are considered for a mix of family household situations. This approach equips communities with the information they need to plan for an inclusive, target-ready workforce.

2.3 COMMERCIAL PROPERTY ANALYSIS. The analysis will cover supply and demand trends to identify market opportunities for the City's real estate product. We will review key real estate market indicators, including rents, vacancies, and construction deliveries, as well as the underlying drivers of demand in the key property types. Our analysts will examine the extent to which available sites

and redevelopment opportunities align with target industries, workforce capacity, business trends, utilities, and equitable economic development for underserved and underinvested communities. This task will help identify development opportunities and inform strategies to establish the City as a leading destination for relocations and expansions for identified key sectors.

2.4 BUSINESS ATTRACTION, RETENTION, AND EXPANSION. Based on the target sector and development opportunities identified in Tasks 2.2 and 2.3, consultants will examine the City's current marketing, branding, and incentives/related policies to inform business attraction, retention, and expansion recommendations.

- ▶ **Incentives.** Building on our work in Task 1.2, we will conduct a review of the City's current recruitment and retention efforts, particularly incentives and related policies. This work will suggest how to better align future business development with market opportunities.
- ▶ **Marketing.** How an area is perceived—by the public, visitors, the media, corporations, and site selectors—is crucial to its economic health. Our team will seek to answer: What image is Rancho Cordova projecting? We will consider the approach used by the City and other local partners, as well as marketing and branding campaigns that are recruitment-and retention-driven. This will suggest opportunities for marketing practices/tools, branding, and programs that are aligned with business attraction, retention, and expansion efforts in identified key sectors.

2.5 OPPORTUNITY WORKSHOP. This is a facilitated discussion of potential strategies and opportunities for consideration in the Implementation phase. By building consensus on economic development priorities for Rancho Cordova, the result will be a set of prioritized strategies and focus areas, along with a collaborative framework for aligning available resources to accomplish them.

3. IMPLEMENTATION

We provide a transparent, actionable plan for achieving the identified goals and objectives.

3.1 INTERACTIVE DATA DELIVERABLE. As a companion to the strategic plan, we will provide all

quantitative data findings (Tasks 1.3, 2.2, 2.3) in an interactive format. Many of our clients make their Tableau data visualizations available online to the public.

3.2 STRATEGIC PLAN. Using findings from prior phases, coupled with the experience of the consulting team, TIP will prepare a three-year strategic plan that furthers sustainable and inclusive economic growth. In addition to outlining specific goals and strategies, the plan will highlight key findings from our quantitative analyses and stakeholder input. Together with the implementation plan (see Task 3.3), the resulting document will provide specific recommendations and tools needed to implement a long-term economic strategy. We anticipate the plan would address a number of topics, including the following.

- ▶ Pinpointing the City's market position, as well as primary opportunities/challenges.
- ▶ Positioning the City with identified key sectors.
- ▶ Prioritizing development projects aligned with growth areas and equity goals.
- ▶ Aligning incentives with economic development goals and objectives.
- ▶ Improving marketing practices and tools, brand development, and programs.
- ▶ Proposing innovative initiatives to attract new businesses and investments to the City.

3.3 IMPLEMENTATION PLAN. TIP will prepare a matrix that identifies responsible parties and potential partnership opportunities, establishes timelines and levels of effort, sets priorities, includes budget estimates (where applicable), identifies potential funding sources, and defines meaningful and realistic performance metrics over the next three years of implementation.

3.4 PRESENTATION. TIP will prepare a PowerPoint presentation and present the proposed strategic and implementation plans for Council Members' consideration and approval at a public meeting.

3.5 IMPLEMENTATION WORKSHOP. To build momentum, we will also facilitate an Implementation workshop focused on near-term tasks (60 to 90 days) in conjunction with the final presentation. This step capitalizes on the energy that is present at rollout and helps to jump start the process.

DELIVERABLES

To execute the preceding scope, TIP will provide the following deliverables in the formats indicated in parentheses. All deliverables will be in an electronic format in TIP's color scheme and fonts. Requests for custom branding must be agreed upon in advance and may be subject to an additional fee.

- ▶ Facilitation of project meetings, such as team meetings, steering committee meetings, and workshops, including electronic versions of any presentations (PowerPoint) or other materials.
- ▶ Facilitation of input sessions, such as roundtables, interviews, public forums, and stakeholder workshops, including electronic versions of any presentations (PowerPoint) or other materials.
- ▶ Interactive data visualizations (Tableau Public) of the analyses outlined in the scope of work.
- ▶ Narrative deliverable (PDF of Word document) highlighting findings and recommendations, including selected graphics as applicable.
- ▶ Implementation plan (Excel) with goals, strategies, and actions for use assigning roles/ timeframes.

CLIENT ROLE

To execute the scope, our team will work closely with the City and seek assistance in several areas.

- ▶ Designating a point person responsible for assisting with scheduling project meetings, helping with stakeholder input (logistics, advertising, translation services), and coordinating deliverables review.
- ▶ Providing economic development plans, budget and staffing for economic development, major employer list, recent surveys, a list of partners/initiatives, and information on special districts and recent prospects.
- ▶ Identifying key stakeholders and helping to bring them to the table.
- ▶ Providing information on current economic conditions, as well as historical and future trends.
- ▶ Providing input and feedback on deliverables throughout the process.

SCHEDULE

The TIP team is available to begin work immediately upon agreement of terms. The timeline assumes a December 2023 start date and estimates eight months for project completion. It is intended to provide an overview of the process and can be adjusted to meet project objectives.

TASK	2023/2024							
	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
DISCOVERY								
1.1 Project launch	①							
1.2 Organizational analysis								
1.3 City baseline analysis								
1.4 Stakeholder engagement								
1.5 Competitive position			②					
OPPORTUNITY								
2.1 Strategic direction								
2.2 Target industry analysis				③				
2.3 Commercial property analysis								
2.4 BRE and attraction								
2.5 Opportunity workshop					④			
IMPLEMENTATION								
3.1 Interactive data deliverable								
3.2 Strategic plan						⑤		
3.3 Implementation plan								
3.4 Presentation								
3.5 Implementation workshop								
ONGOING MEETINGS								
Steering committee meetings								
Staff team meetings								

SELECTED MILESTONES

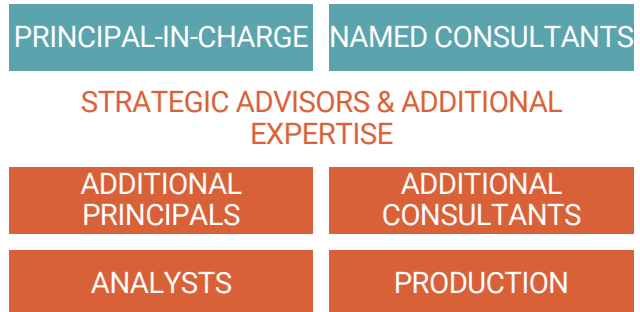
- ① Kickoff meeting
- ② Competitive position
- ③ Target industry analysis
- ④ Opportunity workshop
- ⑤ Draft strategic plan

NOTE: TIP has a production process that should be factored into timelines for the development of deliverables. This process includes professional proofreading and design. The time required for production may vary based on the type of deliverable, planned uses/audiences, and amount of content.

PROJECT TEAM

At TIP, the work of our consulting team is conducted under the direct supervision of a senior member of the firm. The **principal-in-charge** is actively involved in every phase. TIP senior partner **JEFF MARCELL** will act as principal-in-charge and primary point of

CLIENT-FACING TEAM



contact for this work. In this capacity, he will participate in the scoping of the project and provide technical and strategic input throughout.

The principal-in-charge receives input from other senior members of our staff who serve as **strategic advisors** to the work. **TRACYE MCDANIEL**, TIP president, will contribute expertise on topics including marketing, branding, business attraction/retention/expansion, and equity.

In addition, a **lead consultant** is assigned to manage each engagement and is responsible for day-to-day client communication, directing project research, and report writing. Senior consultant **JENNIFER TODD-GOYNES** will serve as lead consultant for this work and will be assisted in these duties by consultant **VICTORIA WILSON**. As shown in the diagram above, the project leads are assisted by **analysts** (**BRENT MCELREATH**, **EVAN JOHNSTON**, **AJAY KASTURIRANGAN**, and **REECE NEATHERY**) and **production professionals** (**KAREN BEARD** and **MEREDITH EBERLE**), who have extensive experience preparing thought-provoking analyses and engaging deliverables.

Our process also includes regular brainstorming sessions. Project managers present their findings for peer review, ensuring clients benefit from the full expertise of our team.

As required, resumes for key project team members are provided as an appendix. Additional resumes are available upon request.

COST PROPOSAL

The fee for this work is \$140,000, plus expenses, with total costs not to exceed \$150,000.

FEES

Our contracts are typically structured as a flat fee, payable in monthly installments based on the length of the engagement. This breakdown is an estimate that reflects anticipated level of effort. Adjustments may be made between phases to reflect changing priorities and assignments during the engagement.

► Discovery	\$50,375
► Opportunity	\$45,500
► Implementation.....	\$44,125
► Total	\$140,000

Although we typically bill a flat fee, we have provided hourly rates as requested.

► Principal	\$275
► SVP/VP/Senior.....	\$200
► Professional	\$150
► Associate	\$125

EXPENSES

Expenses are subject to approval and are billed at cost. We anticipate a combination of virtual and in-person meetings. The not-to-exceed amount above assumes three to four in-person trips. The per unit cost shown below are estimates only. Actual trips may include a mix of travel modes and varying levels of staffing, travel days, etc. The timing and number of trips would be discussed as part of the development of a project work plan.

ESTIMATED TRAVEL EXPENSES PER TRIP	PER UNIT COST	TOTAL
Airfare (roundtrip fare for 2 staff members)	\$500	\$1,000
Parking	\$20	\$120
Car rental/ground transportation	\$100	\$300
Meals & incidentals	\$50	\$300
Lodging (2 nights)	\$195	\$780
Total Estimated Expenses Per Trip		\$2,500

APPENDIX: KEY PERSONNEL RESUMES



JEFF MARCELL
Senior Partner
jeff@tipstrategies.com

EDUCATION

- ▶ Juris Doctorate, South Texas College of Law
- ▶ Bachelor of Arts, Political Science, University of Illinois at Chicago

EXPERTISE

- ▶ Policy development
- ▶ Competitive analysis and positioning
- ▶ Organization fundraising
- ▶ Change management
- ▶ Process reengineering

AFFILIATIONS

- ▶ Past Chair, Washington Economic Development Association
- ▶ Board and Executive Committee Member (former), Puget Sound Economic Development District Board
- ▶ Founding Board Member, Aerospace Futures Alliance
- ▶ Board Member (former), Washington Aerospace Partnership
- ▶ Board and Executive Committee Member (former) Seattle-King County Workforce Development Council
- ▶ Board Member (former), Seattle Metropolitan Chamber of Commerce
- ▶ Member (former), Multi-cultural & Small Business Task Force, Seattle Metro Chamber

ABOUT

As a principal, Jeff Marcell leads national consulting engagements and contributes to the strategic planning of the business.

EXPERIENCE

Before joining TIP, Jeff served as the president and CEO of the Economic Development Council of Seattle and King County (EDC). He was responsible for the organization's mission of business and job creation, retention, expansion, and recruitment in King County. Jeff joined the EDC in 2004, and during his tenure, rebuilt the organization's client-based economic development program.

Prior to joining the EDC, Jeff was an economic development consultant with Angelou Economics, and a marketing executive in the Economic Development Division of the Greater Houston Partnership. He was responsible for retaining and recruiting corporate expansions and relocations by marketing and promoting the Houston region nationally and internationally. During his term with the Partnership, the organization brought in over 25,000 jobs to the Houston region with \$3.4 billion in annual economic impact to the community.

In 2007, Jeff was named one of the Puget Sound Business Journal's 40 Under 40. In 2013, he received the MacArthur Award for Leadership from the Washington State Department of Commerce. He has been recognized by the IEDC for his efforts in Technology-Led Economic Development and Clean Technology and was the recipient of an Outstanding Board Service Award from the Seattle-King County Workforce Development Council, 2012.

SIGNIFICANT PROJECTS

- ▶ Supervised the recruitment, retention, and expansion of 65 companies representing nearly 7,000 primary jobs in the Seattle region.
- ▶ Drafted program and operation plans for the Delaware Prosperity Partnership, the Washington Military Alliance, and Newport County, RI.
- ▶ Conducted strategies for regions in California's Central Coast (Santa Barbara and San Luis Obispo Counties), East Central Michigan, North Iowa, Northwest Indiana.
- ▶ Led strategies for counties including Lewis, Kittitas, and Klickitat in Washington; Oakland County in Michigan; and Charleston County in South Carolina.
- ▶ Led National League of Cities cohort work for inner-ring cities in Kansas City, MO-KS; Phoenix, AZ; and Dayton, OH, MSAs.
- ▶ Conducted strategic planning for San Luis Obispo, CA; Miami-Dade County, FL; Minneapolis-St. Paul, MN; Detroit, MI; Auburn and Shelton, WA; City of Corning, NY; Missouri City, TX.



TRACYE MCDANIEL
President
tracye@tipstrategies.com

EDUCATION

- ▶ Bachelor of Science in Communications, University of Texas at Austin

EXPERTISE

- ▶ International and domestic market development
- ▶ Business recruitment, expansion, retention
- ▶ Economic development marketing
- ▶ Tourism development and marketing
- ▶ Fundraising strategies
- ▶ Workforce strategies
- ▶ Regional economic development
- ▶ State and regional public-private partnerships

AFFILIATIONS

- ▶ Immediate Past Chair, International Economic Development Council
- ▶ Member, Texas Economic Development Council
- ▶ Fellow, Ford Foundation Regional Sustainable Development
- ▶ Board of Directors, NAIOP—New Jersey Chapter
- ▶ Appointed, Council on Innovation
- ▶ Appointed, New Jersey Military Installation Growth and Development Task Force
- ▶ Board member (former), Texas Economic Development Corporation

ABOUT

Tracye McDaniel is a recognized trailblazer who has led successful public and private economic development organizations at the state and regional level under five governors in two states. She has been a trusted advisor to CEOs, nonprofits, public organizations, and private enterprises for more than three decades. Tracye has earned a reputation of creating mutually beneficial strategic partnerships among leaders across a broad spectrum of industries.

EXPERIENCE

Prior to joining TIP Strategies, Tracye founded McDaniel Strategy Ecosystems and served as president/CEO for two separate state-level marketing and lead-generation organizations: first in New Jersey (where she was appointed by then newly elected New Jersey governor, Chris Christie, and business leaders to serve as the founding CEO of Choose New Jersey) and later in Texas (where she headed up the Texas Economic Development Corp.). Her expertise in international business development and marketing spans more than 50 countries.

Tracye also served as executive vice president and COO of the Greater Houston Partnership, Houston's most influential business organization. During her tenure she refined and implemented the organization's 10-year strategic plan and teamed with business leaders to raise more than \$32 million and to devise and execute Opportunity Houston, the organization's successful economic development global marketing and lead generation initiative.

Tracye is known for building accomplished teams that get results. She is a sought-after speaker, presenting to national and international audiences, and has published and appeared in global publications and news outlets. Tracye lives in Austin, Texas.

SIGNIFICANT PROJECTS

- ▶ **Organizational and entity development:** Greater Sacramento Economic Council (CA); Department of Economic Equity and Opportunity, Harris County, TX; City of Dallas Economic Development Corporation (TX).
- ▶ **Economic development fundraising:** Opportunity Houston (TX), Choose New Jersey.
- ▶ **Public-private partnerships state/regional level:** Choose New Jersey, TexasOne (Texas Economic Development Corporation), and Greater Houston Partnership (TX).
- ▶ **Economic development marketing:** Texas Wide Open for Business, Office of the Governor Economic Development and Tourism.
- ▶ **Tourism development/marketing:** Texas: It's Like A Whole Other Country, Texas Department of Economic Development & Tourism.



JENNIFER TODD-GOYNES
Senior Consultant
 jenn@tipstrategies.com

EDUCATION

- ▶ Master of Science, Community and Regional Planning, University of Texas at Austin
- ▶ Bachelor of Arts, History, University of Georgia
- ▶ Bachelor of Business Administration, Management, University of Georgia

EXPERTISE

- ▶ Disaster recovery and resiliency
- ▶ Local and regional economic development
- ▶ Planning and land use
- ▶ Project management
- ▶ Organizational strategy
- ▶ Stakeholder engagement
- ▶ Strategic planning and implementation

AFFILIATIONS

- ▶ Congress for the New Urbanism Accredited

ABOUT

Jennifer Todd-Goynes brings more than 15 years of experience contributing to transformational projects focused on how the nexus of people, places, and economy can create more resilient, sustainable communities. As a TIP consultant, Jenn manages projects that utilize her planning and recovery experience, as well as her knack for taking on big challenges that require visioning, strategic planning, and relationship building to achieve creative solutions and actionable strategies.

EXPERIENCE

Prior to joining TIP, she worked for the City of Austin as a Principal Planner leading a citywide land development code rewrite as well as the development small area plans; she also contributed to the development of a new departmental strategy.

Other experience with the public sector includes leading community engagement and urban planning efforts with the District of Columbia Government. With the International Economic Development Council, she designed regional economic development strategies with a focus on disaster recovery and organizational management, and identified strategies for sustainable industry development.

SIGNIFICANT PROJECTS

- ▶ **Establishing new economic development organizations:** Dallas, TX; Harris County, TX.
- ▶ **Organizational strategy:** Columbus Partnership (OH); Greater Sacramento Economic Council (CA); International Economic Development Council; Kerr Economic Development Corporation (TX).
- ▶ **Local and regional economic development strategies:** Chicago Metropolitan Agency for Planning (IL); First Suburbs Council of Dayton (OH); Fort Worth, TX; Mid-America Regional Council (MO); Midland, TX; Phoenix East Valley Cities (AZ); Waco, TX; National League of Cities cohorts (inner-ring cities in Kansas City, MO-KS; Phoenix, AZ; and Dayton, OH; MSAs).
- ▶ **Disaster recovery and resiliency strategies:** Fort Collins, CO; Larimer and Weld Counties, CO; State of Idaho; Lake Charles, LA; New Orleans, LA.

**VICTORIA WILSON***Consultant*

victoria@tipstrategies.com

EDUCATION

- ▶ Master of Public Affairs, University of Texas at Austin
- ▶ Bachelor of Arts, Philosophy and German, Colgate University

EXPERTISE

- ▶ Local & regional economic development
- ▶ Project management
- ▶ Freight and trade planning
- ▶ Binational logistics hubs and corridors
- ▶ Affordable housing policy
- ▶ Data analysis
- ▶ Policy analysis
- ▶ Written deliverables

ABOUT

Victoria Wilson has experience leveraging qualitative and quantitative datasets to develop original insights. She has worked with government agencies, legislators, and industry leaders to deliver collaborative policy solutions to complex problems.

EXPERIENCE

Prior to joining TIP Strategies, Victoria was a policy manager in the affordable housing space. In this role, she worked with industry leaders and legislators to develop policy positions and strategy. She has also worked as a transportation researcher focused on freight and trade policy, as well as transportation planning, in Texas. Her experience includes policy and data analysis, writing research reports, and engaging with local, state, and federal stakeholders to promote collaboration in planning efforts.

Victoria received a Master of Public Affairs from the University of Texas' Lyndon B. Johnson School of Public Affairs and a Bachelor of Arts in Philosophy and German from Colgate University.

SIGNIFICANT PROJECTS

- ▶ Regional and local economic development plans for McAllen (TX), Kittitas County (WA), and the Texas Association of Business.
- ▶ Contributed to development, tracking, and visualization of public-facing performance metrics for the Texas Department of Transportation.
- ▶ Co-authored research on last-mile logistics and delivery driver job satisfaction.
- ▶ Conducted research about the impacts of demographic changes on transportation corridors and local economies in Texas.
- ▶ Evaluated community impacts of cross-border trade.
- ▶ Led research about the impacts of technology on the supply chain industry.
- ▶ Co-led Low Income Housing Tax Credit education campaign during the 87th Texas Legislative Session.



TOM STELLMAN
CEO/Founder
tom@tipstrategies.com

EDUCATION

- ▶ Bachelor of Arts, Government, University of Texas at Austin

EXPERTISE

- ▶ International and domestic recruitment
- ▶ Talent management and workforce development
- ▶ Regional economic strategies
- ▶ Automotive supplier strategies
- ▶ Defense-dependent communities

AFFILIATIONS

- ▶ Board of Directors (former), Texas Economic Development Council
- ▶ Advisory Board Member (former), Community Development Institute
- ▶ Board Member (former), Camino Real Export Council
- ▶ Board Member (former), Center for International Business and Economic Research at the University of Texas at Austin
- ▶ Instructor, Texas Basic Economic Development Course

ABOUT

Tom Stellman is founder of the consultancy and leads high-impact project engagements throughout the country. As developer of TIP's model of Talent, Innovation, and Place, he helps clients identify their core value and build consensus around strategies to promote economic health. He is the lead author of TIP's Automotive Profile, the Invest in Texas Business Guide, and the Texas Manufacturing Skills Gap.

EXPERIENCE

Over the last decade, Tom has led defense-related engagements, including the preparation of a statewide defense diversification strategy for MassDevelopment; an economic growth strategy for the bi-state region surrounding Fort Campbell; and an economic diversification plan for Eastern Kern County, CA. He has also expanded the firm's workforce practice, including talent-driven analyses and strategies for regional organizations in Tampa Bay, Houston, Milwaukee, El Paso, and South Carolina.

In addition to leading consulting engagements, Tom developed and launched the Invest in Texas Alliance, a marketing initiative sponsored by 26 economic development agencies and electric utilities. His team targeted both domestic and international growth companies through a unique mix of direct marketing and networking, resulting in over \$3 billion in investment leads and the location of 15 companies.

Prior to establishing TIP, Tom was director of the Office of International Business for the Texas Department of Commerce, where his team was charged with promoting the state's exports, marketing the state to foreign investors, and facilitating communication between foreign investors and economic development organizations statewide. He also served as staff to the Texas Mexico Authority and as border development coordinator for the state. A Texas native, Tom lives in Austin with his wife and their four children.

SIGNIFICANT PROJECTS

- ▶ **Statewide planning:** Texas Workforce Commission, Economic Development Districts of Idaho, Idaho Department of Commerce, Oregon Talent Council.
- ▶ **Economically driven strategies for workforce boards:** Western Kentucky Workforce Investment Board; Workforce Solutions of Central Texas, Rural Capital Area, North Central Texas, and Lower Rio Grande Valley (TX); Clarksville-Montgomery County, TN.
- ▶ **Regional planning and targeting analysis:** Tampa-Hillsborough, FL; Bismarck-Mandan and Greater Fargo Moorhead, ND; WIRED 26-county region (Louisville, KY/IN area).
- ▶ **Defense-related work:** State of Massachusetts; Fort Campbell (KY); Kern County, CA; Fort Hood (TX); Sheppard AFB (TX); Anniston Army Depot (AL); Eglin AFB (FL).
- ▶ **Rural entrepreneurship assessments:** Northeast Texas and Southwest Arkansas.
- ▶ **Marketing initiative:** Invest in Texas Alliance.



JON ROBERTS
Managing Partner
 jon@tipstrategies.com

EDUCATION

- ▶ Post graduate research, University of Oregon
- ▶ Master of Arts, Political Philosophy, University of Hawaii
- ▶ Bachelor of Arts, University of Hawaii

EXPERTISE

- ▶ International and domestic recruitment
- ▶ Regional economic strategies
- ▶ Venture capital and high-growth entrepreneurship
- ▶ Economic development marketing

AFFILIATIONS

- ▶ Fellow of the Washington World Affairs Council (Seattle)
- ▶ Economic Development Certification, National Development Council
- ▶ Member, Texas Economic Development Council
- ▶ Member, International Economic Development Council
- ▶ Board of Trustees (former), KMFA radio (Austin, Texas)

ABOUT

Jon Roberts has been a principal and managing partner at TIP Strategies since 2000. He helped transition the company from its Texas-based site selection practice to an economic strategy firm with major national recognition. His portfolio includes planning work from New York to California, with significant regional projects in the Mississippi Delta, Seattle's Puget Sound, and in the Great Lakes area.

EXPERIENCE

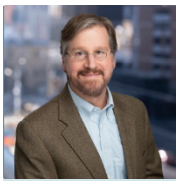
Prior to joining TIP, Jon was the director of business development first for the State of Washington and then under Governor Ann Richards for the State of Texas. During the transition to Governor Bush's tenure, he helped restructure the state's economic development organization and then co-authored the new strategic plan for the State of Texas. Jon also has deep ties to the state of Oregon. He was vice-president with the Oregon Technology Fund and was the lead investor for the Hood River Brewing Company (Full Sail), which continues to hold a prominent place in the craft brewing industry. He also managed two start-up technology companies: Fiberlite Composites and LifePort Inc. LifePort was subsequently acquired by Sikorsky.

Jon has served on the boards of several startup technology companies and on state task forces and gubernatorial committees. He has lectured in business at the University of Washington, the University of Texas, and was on the faculty at Marylhurst College in Portland, Oregon. Jon was also the founder of a mountain bike company in Portland: the Fat Tire Farm, which now operates multiple retail outlets.

Born and raised in Germany, Jon has traveled extensively throughout Europe and Asia. He resides in Austin but spends his summer in Bend, Oregon.

SIGNIFICANT PROJECTS

- ▶ **State and regional economic development planning:** State of Mississippi; Puget Sound Regional Council (WA); Delta Regional Authority; Gulf Coast Community Foundation (MS).
- ▶ **Countywide economic development planning:** Jackson County, MS; Chester County, PA; Forsyth County, GA; Jefferson Parish, LA; Montgomery County, MD; Green Bay, WI.
- ▶ **Citywide economic development planning:** Fort Collins, CO; Clearwater, FL; Redmond, WA; McKinney, TX.
- ▶ **Comprehensive economic development strategies:** Assoc. of Central Oklahoma Governments; Richmond, VA.
- ▶ *Envision Central Texas* project for Austin Metro area.
- ▶ State of Texas Strategic Economic Development Plan.
- ▶ Recruitment of Matsushita Semiconductor (NSC) to Washington.



BRENT MCELREATH, AICP
SVP, Research & Development
brent@tipstrategies.com

EDUCATION

- ▶ Master of Science, Community & Regional Planning, University of Texas at Austin
- ▶ Bachelor of Business Administration, Finance, University of Texas at Austin

EXPERTISE

- ▶ Regional and metropolitan economics
- ▶ Economic development strategy
- ▶ Real estate and property market fundamentals
- ▶ Infrastructure analysis
- ▶ Capital and financial analysis

AFFILIATIONS

- ▶ Member, American Institute of Certified Planners
- ▶ Member, American Planning Association
- ▶ Past Member, Urban Land Institute

ABOUT

Brent McElreath has more than 25 years of experience in comparative urban economic analysis. He has managed research teams in both the public and private sectors and has extensive work experience in real estate and infrastructure markets, with a focus on their cyclical and structural drivers. During his career he has spearheaded innovations in scenario modeling, fiscal impact analysis, and data collection and reporting systems. Brent has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets during his career.

EXPERIENCE

As a vice president at MSCI, Brent designed and implemented performance monitoring systems for metropolitan property markets. He also developed and authored publications explaining differences in investment risks across property types, metropolitan areas, and national markets. His graphical analysis became a fixture of MSCI's annual property market review presentations in North America, Europe, and the Asia Pacific region.

While at PPR (now CoStar), Brent supervised the publication of 250+ quarterly property market forecasts. He also oversaw the modernization of PPR's data collection systems and led the firm's initial groundwork in global risk analysis.

Brent's career began in economic development in Texas in the 1990s. He brings this background to his current role at TIP, combined with extensive experience in the dynamics of real estate, infrastructure, and capital markets. Brent is a member of the American Planning Association and an AICP-certified planner.

SIGNIFICANT PROJECTS

- ▶ **Strategic planning:** Chicago Metropolitan Agency for Planning (2022); Indianapolis Metropolitan Planning Organization (2022); Virginia Beach, VA (2021); Tampa Bay Economic Dev. (2019); Fort Worth, TX (2017).
- ▶ **Prioritization models:** global port investment, for Deutsche Bank (2009); global agricultural markets, for Southern United States Trade Association, (2007); global city office markets, for Mitsui Fudosan (2004).
- ▶ **Property sector dynamics:** European industrial property, for IPD (2013); Asian retail property, for Prudential (2013), US residential property, for Michigan Office of Retirement Services (2001).
- ▶ **Selected publications:** *Global Property Performance* (2016); *The Road to a Seamless Global Real Estate Portfolio* (2016); *Sectoral Aspects of Global Infrastructure Investment* (2015); *Global Infrastructure Investment: An Overview of the Institutional Landscape* (2014); "Global Real Estate Risk Index," RE/PS 6.6 (2002).



EVAN JOHNSTON
Senior Analyst
evan@tipstrategies.com

EDUCATION

- ▶ Bachelor of Arts, Economics and Psychology, University of Texas at Austin
- ▶ Bachelor of Science, Mathematics, University of Texas at Austin

EXPERTISE

- ▶ Regional labor market analysis
- ▶ Data manipulation and visualization
- ▶ Statistical analysis
- ▶ Quantitative and qualitative research

ABOUT

Evan Johnston works with principals and consultants to collect, organize, and analyze data for clients. He helps the project team to find reputable, reliable data and to distill them into meaningful analyses used in reports and presentations. He specializes in data visualization, economic analysis, and labor market research with an emphasis on equitable workforce development and resiliency.

EXPERIENCE

Before joining TIP, Evan worked as a social science research associate at the IC² Institute and the McCombs School of Business at the University of Texas at Austin on research projects examining labor market dynamics and entrepreneurship.

Evan holds a Bachelor of Arts in Economics and Psychology and a Bachelor of Science in Mathematics from the University of Texas at Austin. He also completed certificates in applied statistical modeling, computer science, and business during his undergrad.

SIGNIFICANT PROJECTS

- ▶ Developed TIP Strategies' Occupational Risk Tool and Occupational Accessibility Tool, two dynamic analytical tools that estimate aspects of workers' risk during the COVID-19 pandemic as well as job quality and accessibility more broadly.
- ▶ Talent Migration: Analyzed federal data tracking worker separations and hires to create an interactive analytical tool describing worker migration trends across the US.
- ▶ Workforce housing: National League of Cities, pilot project on affordable housing on behalf of the Mid-America Regional Council (MARC) which serves the Kansas City area.
- ▶ Job Polarization in Austin: Co-author of Echeverri-Carroll, Oden, Gibson, & Johnston (2018) "Unintended consequences on gender diversity of high-tech growth and labor market polarization" in *Research Policy*.
- ▶ Austin's Entrepreneurial Ecosystem: Contributed to a Kauffman Foundation-funded study of Austin's entrepreneurial ecosystem. Acknowledgement of contributions in Echeverri-Carroll and Feldman (2018) "Chasing entrepreneurial firms" in *Industry and Innovation*.



AJAY KASTURIRANGAN
Analyst
ajay@tipstrategies.com

EDUCATION

- ▶ Master of Science, New York University Center for Urban Science + Progress
- ▶ Bachelor of Technology, Manipal Institute of Technology

EXPERTISE

- ▶ Data Science
- ▶ Machine Learning
- ▶ Big Data Management
- ▶ Urban Informatics
- ▶ Dashboarding

ABOUT

Ajay Kasturirangan works with the firm's Research and Development team. His responsibilities include using data-driven methods to develop tools and dashboards to track economic metrics both quantitatively and qualitatively for the client.

EXPERIENCE

Prior to joining TIP, Ajay worked as a course assistant for a *Machine Learning for Cities* course at New York University (NYU). Prior to that he worked as a data analyst in the insurance industry, crafting enterprise-level dashboards and working extensively with sales, risk, and financial data.

Ajay holds a Master of Science from NYU's Center for Urban Science + Progress, where he studied how to use data science and machine learning techniques to solve critical problems in cities.

SIGNIFICANT PROJECTS

- ▶ Presented a research study at the Applied Urban Science Conference 2023, analyzing the patterns of head and eye coordination in low vision individuals in New York City.
- ▶ Developed a machine learning model to predict gross domestic product of US counties based on night light emission image data using open-source tools.
- ▶ Created a report about how government agencies can use technology to improve the state of public toilets in New York City.



REECE NEATHERY
Associate Analyst
reece@tipstrategies.com

EDUCATION

- ▶ Master of Urban Planning, Texas A&M University
- ▶ Bachelor of Science, Geography with a minor in Mathematics, University of Alabama

EXPERTISE

- ▶ Geospatial analysis
- ▶ Land use planning
- ▶ Stakeholder engagement
- ▶ Walkability and placemaking

ABOUT

Reece Neathery works on TIP's Research and Development team, gathering and analyzing data to provide clear communication between consultants and project stakeholders. He specializes in GIS mapping and analysis, using maps to effectively convey the story being told by a dataset.

EXPERIENCE

Prior to joining TIP, Reece worked as a research assistant at the Texas Real Estate Research Center at Texas A&M University, using GIS software to provide mapping and data visualization of various land use and property characteristics, later automating some of these processes for replication.

Additionally, Reece has worked on several long-term planning projects for various rural communities across Texas with Texas Target Communities. This has included developing long-term transportation and economic development plans, based heavily on stakeholder engagement. He brings with him several years of GIS and demographics analysis experience, especially in the context of planning and real estate.

SIGNIFICANT PROJECTS

- ▶ Participation in development of long-term growth management plans for various rural communities across Texas.
- ▶ Automation of quarterly commercial maps illustrating real estate trends in major Texas metro areas at Texas Real Estate Research Center.
- ▶ Contribution to various urban economics and real estate-focused articles published in Texas Real Estate Research Center's *Tierra Grande* magazine.
- ▶ Graduate-level research on placemaking and walkability in regions of extreme heat.



KAREN BEARD
SVP, Production
karen@tipstrategies.com

EDUCATION

- ▶ Master of Science, Community & Regional Planning, University of Texas at Austin
- ▶ Bachelor of Arts, Sociology, University of Texas at Austin

EXPERTISE

- ▶ Survey research
- ▶ Regional economic analysis
- ▶ Workforce and higher education analysis
- ▶ Writing and editing

AFFILIATIONS

- ▶ Instructor, Texas Basic Economic Development Course

ABOUT

Karen Beard has 30 years of experience thinking about economic development and community planning from a data, policy, and strategy perspective. Since joining TIP in 2000, she has filled both client-facing and “home team” roles for the firm. As a research associate and then a consultant, she managed client engagements in Texas and across the US, including a focus on helping clients understand their workforce. In her current role as senior vice president of production, Karen helps coordinate the firm’s client deliverables.

EXPERIENCE

Prior to joining TIP, Karen held the position of senior research analyst at the Texas Department of Economic Development. During her tenure at TDED, she was involved in a number of projects, including the design and maintenance of the agency’s “one stop” economic development web sites. In this capacity, she served as the principal developer of the Texas Business & Community Economic Development Clearinghouse, a searchable database of economic development resources.

As a research associate for the State Bar of Texas, Karen analyzed subjects of interest to the legal services industry and participated in dozens of law-related survey research projects, including an extensive annual report on attorney fees and compensation, as well as an award-winning survey on the concerns of minorities in the legal profession. She has also conducted research on the disability community for the Texas Rehabilitation Commission and led a major household travel survey as a research manager for NuStats, an Austin-based transportation research firm. Other topics that she has addressed include the evaluation of manufacturing technology centers and the effect of regulation on the cost of land development.

SIGNIFICANT PROJECTS

- ▶ **Regional economic development planning:** Green River Area Development District, KY; WIRED 26-county region, KY/IN; Racine County EDC, WI.
- ▶ **Defense-dependent communities:** Anniston Army Depot, AL; Fort Hood, TX; Fort Campbell, KY.
- ▶ **Workforce projects:** Workforce Solutions of Central Texas; Western Kentucky Workforce Investment Board; Pearland Economic Development Corporation (TX); Workforce Solutions Lower Rio Grande Valley (TX).

**MEREDITH EBERLE***Senior Graphic Designer*

meredith@tipstrategies.com

EDUCATION

- ▶ Bachelor of Arts, Photography, University of North Texas
- ▶ Undergraduate Studies, Photography, School of the Art Institute of Chicago

EXPERTISE

- ▶ Engaging designs for complex content
- ▶ Document quality control
- ▶ Custom visual content (infographics, maps, and illustrations)
- ▶ Thought-provoking presentations

ABOUT

Meredith Eberle has over 20 years of graphic design and administrative experience in industries ranging from survey research to education. As TIP's graphic designer, Meredith draws on both her career experience and fine-arts education to help shape the look and feel of TIP's presentations and deliverables. Her contributions include design and layout; custom infographics, maps, and illustrations; and other creative digital and print media.

EXPERIENCE

Before joining TIP, Meredith worked in creative and administrative capacities for private education firms. She studied at The School of The Art Institute of Chicago and the University of North Texas, graduating with honors. Meredith also received a Bachelor of Arts in Photography with a minor in Social Science.

SIGNIFICANT PROJECTS

- ▶ Design of presentation on disruptive technology delivered to the International Economic Development Council; also delivered as a webinar and made available for purchase through the organization's online store.
- ▶ Design of presentation on economic equity and inclusion for the Texas Economic Development Council's COVID-19 response webinar series, available for purchase through the organization's online store.
- ▶ *Allen County Together*, an economic development action plan for Greater Fort Wayne, Inc. (IN), designed in the client's branding that showcased the county's quality of place and unique assets.
- ▶ *THRIVE Spokane*, a regional CEDS and resilience framework designed in the client's branding, communicating a collective vision for equitable and sustainable economic prosperity across Spokane County (WA).
- ▶ *Inclusive Growth Analysis* for the Chicago Metropolitan Agency for Planning (CMAP) region designed in TIP's branding.



512.343.9113 | TIPStrategies.com | 13492 N Hwy. 183, Ste 120-254, Austin, TX 78750

ECONOMIC DEVELOPMENT

STRATEGIC PLAN PROPOSALS



AGENDA

01

Background

02

Objectives

03

Selection
Process

04

Consultant
Presentations

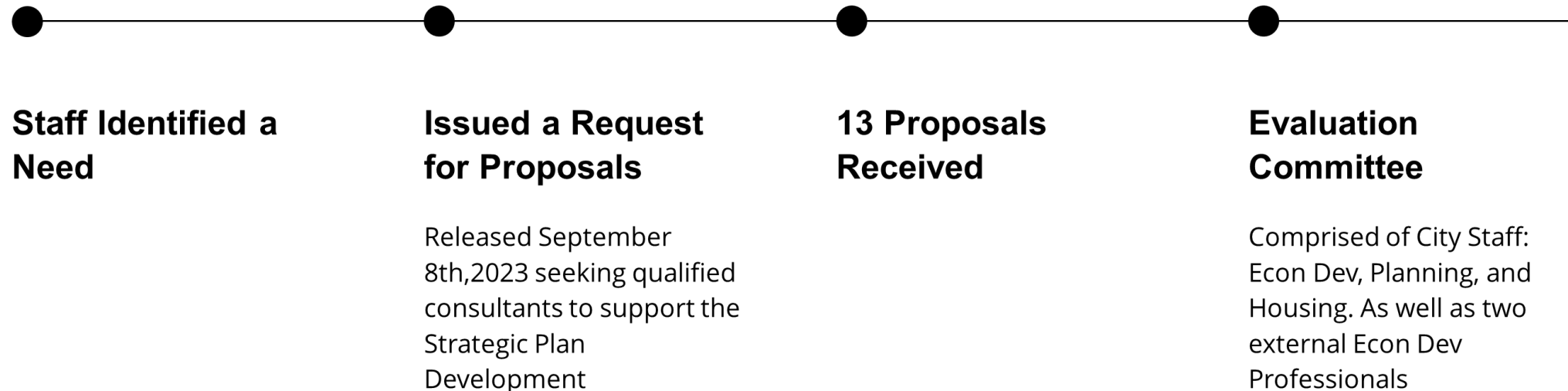
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Council
Feedback

BACKGROUND

WHAT IS AN ECONOMIC DEVELOPMENT STRATEGIC PLAN?

It is a roadmap for the City's economic development efforts, guiding the City in creating quality jobs, fostering entrepreneurship, improving the business support infrastructure, ensuring sustainable growth, and promoting equitable access to opportunities.



OBJECTIVES & ENGAGEMENT

A 3- year roadmap designed to promote overall economic health, increase employment opportunities, raise the standard of living, and improve the resilience and competitiveness of the local economy.

Focus on:

- Policy discussion with City Council Members
- Business Attraction and Retention
- Workforce Development
- Innovation and Technology Advancement
- Economic Diversification
- Sustainable Development
- Quality of Life Enhancements
- Public-Private Partnerships
- Marketing and Branding
- Re-imagining the office park



SELECTION PROCESS

A review committee comprised of City Staff and Economic Development Experts reviewed and ranked all 13 proposals, identifying the top four proposals.

Evaluation Criteria

- ✓ History, background, staffing, resources, and capabilities to complete this Project.
- ✓ Work plan methodology and project schedule.
- ✓ Personnel background, qualifications, demonstrated creativity, and experience in the economic development industry.
- ✓ Experience and expertise in Economic Development Strategic Plan and Implementation Plan for similar communities.
- ✓ Experience with underserved communities
- ✓ References and relevant work samples.

Top 4 Proposals



Proposal for Economic Development Strategic Plan and Implementation Plan

Council Presentation

Tuesday, December 12, 2023



Today

1. Our Team
2. Your Challenge
3. Our Approach



BUSINESS STREET



Our Team

1. The business side of city building.



BUSINESS STREET



Our Team

1. The business side of city building.
2. We get results.





Food



Machining ATTACHMENT 6



Process Control



Other







Our Team

1. The business side of city building.
2. We get results.
3. We know the area.





McClellan

Auburn
Blvd

Fulton
Ave

Auto
Row

N.16th

Folsom
Blvd

Sac
State

Sunrise
Douglas

Port
District

Mather

Oak
Park

UC Davis

The Challenge



BUSINESS STREET





Investment

Talent &



Our Approach



BUSINESS STREET



Our Approach

1. Leverage community assets.



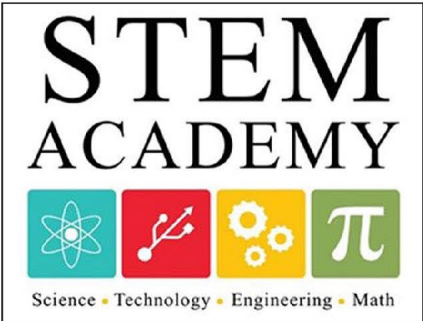
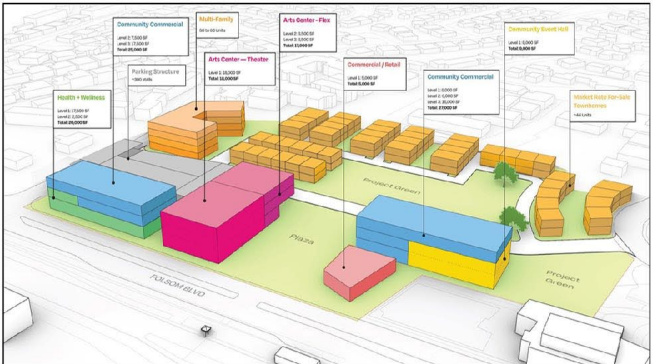
Our Approach

1. Leverage community assets.



BUSINESS STREET

aim
consulting



Rancho Cordova is resourceful.

Our Approach

1. Leverage community assets.
2. Engage, involve, partner.



Our Approach

1. Leverage community assets.
2. Engage, involve, partner.
3. “Baked” in commitment.



Work Phases

1. PRIORITIES



This will be a roadmap for results. What three are most critical over the next three years?

2. RESEARCH



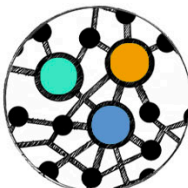
We do our homework first so that we can save people's time and ask better questions.

3. OUTREACH



We'll not just talk with "stakeholders" but search for potential partners.

4. STRATEGY



Great strategy rests on a nexus of interests. This includes not only "what", but "who", "how", and "when".

5. COMMITMENT



We'll bake execution into the strategy, asking individuals to take responsibility for specific results.





Economic Development Strategic Plan Proposal

City of Rancho Cordova
December 12, 2023

fourtheconomy.com



**We help
communities and
organizations
create strategic,
equitable, and
resilient futures.**



Example Projects

Atlantic City, NJ



Economic Action Plan

Macon, GA



Economic Development
Action Plan

State of Indiana



Comprehensive Economic
Development Strategy

Ramsey County, MN



Economic Competitiveness
and Inclusion Plan

Scranton, PA



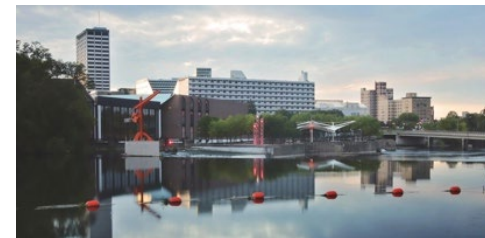
Strategic Economic
Development Plan

York County, PA



Economic Action Plan

Michiana County, IN



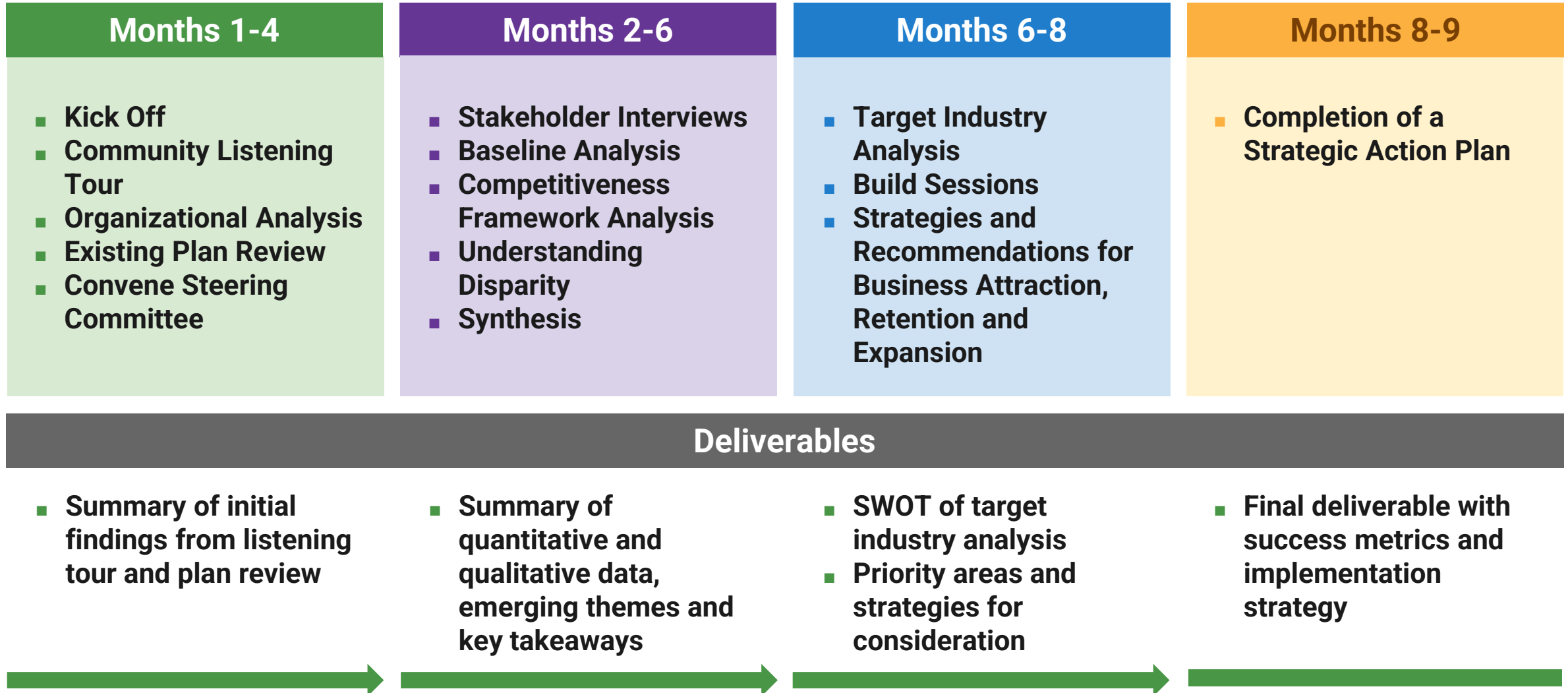
MACOG Economic
Resilience Plan

Laramie, WY



Citywide Economic
Development Action Plan

Timeline and Key Components



Community Engagement

- Surveying (either broad-based to solicit community feedback or targeted for specific insights)
- Stakeholder interviews and focus groups
- Community Build Sessions



Thank you from the Ranch Cordova Project Team!



**Jerry
Paytas, Ph.D.**

Project Director



**Alejandro
Martinez**

Senior Consultant



**Maura
Kay**

Research Lead



**Deminique
Heiks**

Analysis Support,
Engagement
Coordinator



**Andrea
Negrín**

Research &
Engagement
Support



**Justin
Wheeler**

Design & Technical
Communications
Manager

30

THE NATELSON DALE GROUP, INC.
Interview Presentation
December 12, 2023

CITY OF RANCHO CORDOVA
ECONOMIC DEVELOPMENT STRATEGIC PLAN

Team Leaders



Roger Dale



Paul Saldana

The Natelson Dale Group, Inc. (TNDG)

Economic development and real estate consulting firm
established in 1974

Core practice areas include:

- ▶ Economic development strategic planning
- ▶ Target industry analysis
- ▶ Business retention/expansion/attraction
- ▶ Real estate strategies and downtown revitalization
- ▶ Retail market analysis and repositioning
- ▶ Structuring of local/regional alliances

National experience with a California focus

Paul Saldana, CEcD

Economic Development Practitioner for 30+ years

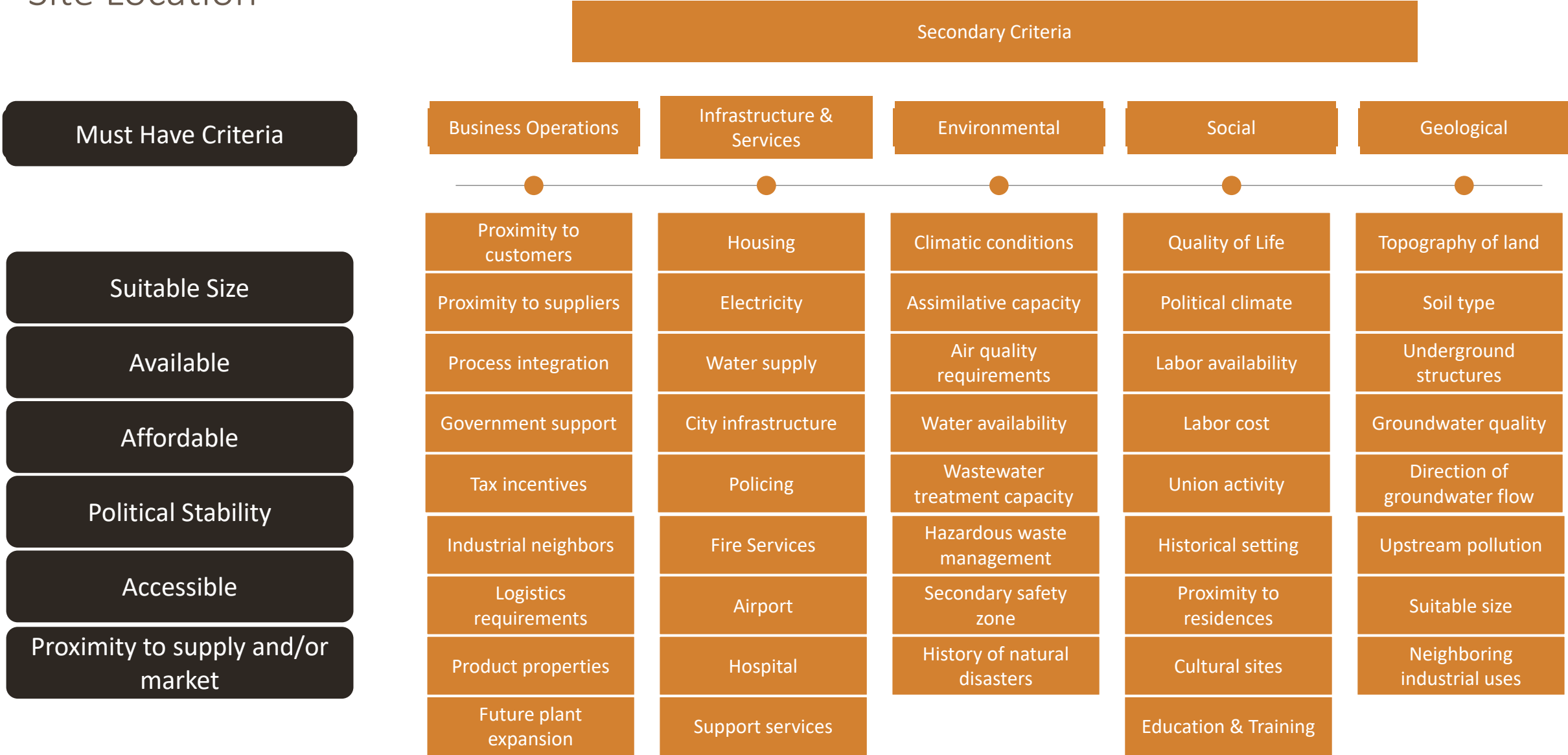
- ▶ Business attraction / deal-making perspective
- ▶ Direct exposure to national/international site selectors
- ▶ Understanding of State and Federal funding sources
- ▶ Focus on inclusive economic development
- ▶ Recent experience building a new ED department based on TNDG plan (Bakersfield)

ITEM 3.1. Our Time-tested Approach to EDSP's ATTACHMENT 6

Balanced mix of integrated activities:

- ▶ Leverage previous plans, studies, partnerships (local and regional)
- ▶ Primary research and technical analysis, reflecting our familiarity with evolving economic development challenges and best practices
- ▶ Realistic understanding of market direction and competitive landscape
- ▶ Inclusive, highly interactive stakeholder engagement
- ▶ Keen attention to equity, inclusion and geographic representation
- ▶ Action-oriented strategic plan reflecting Rancho Cordova's unique potentials and challenges, stakeholder consensus, and “global” influences

ITEM 3.1.
Criteria Influencing
Site Location



Face-to-face Community Engagement

Customized, flexible approach to outreach:

- ▶ “Summit” workshops (EDSP Committee)
- ▶ Community/public workshops (2)
- ▶ Online surveys
- ▶ Ongoing coordination with City staff
- ▶ Direct interaction with City Council

ITEM 3.1. Key Features of EDSP

ATTACHMENT 6

3-Year Implementation Plan: specific, prioritized recommendations

- ▶ Business retention/expansion/attraction plan
- ▶ Entrepreneurial development supports
- ▶ Real estate development strategy
- ▶ Marketing framework
- ▶ Workforce development connections
- ▶ Placemaking/quality of life
- ▶ “Foundational elements” (infrastructure, public safety, housing, etc.)
- ▶ Organizational/funding recommendations
- ▶ Leveraging of City’s resources through partnerships
- ▶ Performance measures/timelines



ECONOMIC DEVELOPMENT STRATEGIC PLAN

CITY OF RANCHO CORDOVA, CALIFORNIA



JEFF MARCELL, SENIOR PARTNER
JENNIFER TODDGOYNES, SENIOR CONSULTANT

INTRODUCTION



THEORY INTO PRACTICE

Committed to holistic thinking and
sustainable development.

We design strategies that will
support your community's
vision for the future.

1995

YEAR FOUNDED

500+

ENGAGEMENTS

350+

CLIENTS

44

STATES

5

COUNTRIES





Project Management Team



Jeff Marcell
Senior Partner

PRINCIPAL-IN-CHARGE



Tracye McDaniel
President

STRATEGIC ADVISOR



Jennifer Todd-Goynes
Senior Consultant

LEAD CONSULTANT



Victoria Wilson
Consultant

ASSISTING CONSULTANT

OUR APPROACH



DISCOVERY

Site visits
Assessment
Benchmarking
Focus groups
Cluster analysis



OPPORTUNITY

Visioning
Goal setting
Consensus building
Strategies
Projects



IMPLEMENTATION

Specific actions
Resources
Leadership
Milestones
Metrics



WHAT YOU TELL US

- ▶ Meetings with community leadership & staff
- ▶ Focus group discussions
- ▶ Stakeholder interviews, surveys, & workshops



WHAT THE DATA TELL US

- ▶ Economic assessment
- ▶ Benchmarking vs. competitors & peer cities
- ▶ Cluster & target industry analysis



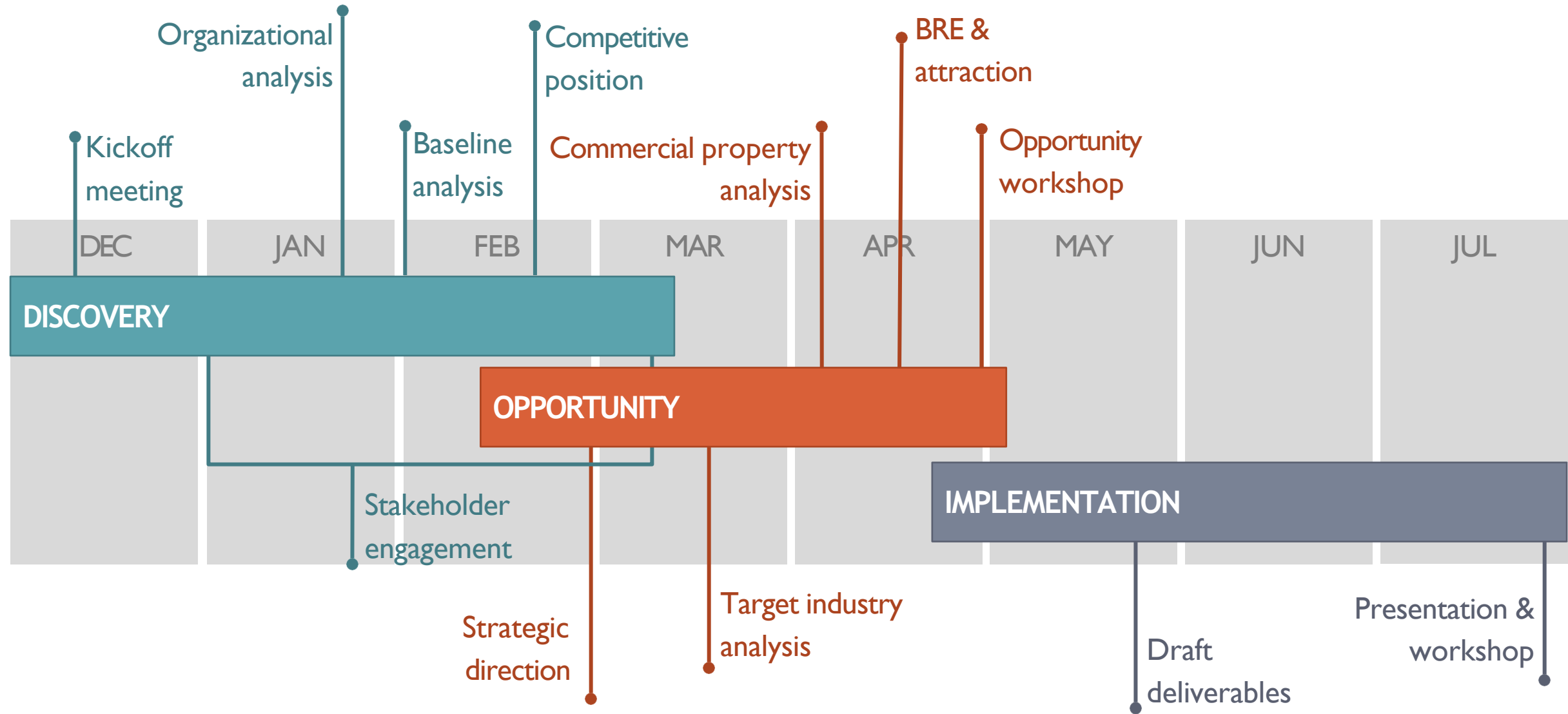
WHAT OUR EXPERIENCE TELLS US

- ▶ Strategies & initiatives
- ▶ Best practices
- ▶ Trends in economic development

PROJECT GOAL

To create an economic development strategy and detailed implementation roadmap that drive inclusive growth and prosperity in Rancho Cordova.

PROPOSED SCHEDULE



NOTE: TIP has a production process that should be factored into timelines for the development of deliverables. This process includes professional proofreading and design. The time required for production may vary based on the type of deliverable, planned uses and audiences, and amount of content.

ENGAGEMENT PROCESS



OUTREACH

Raise awareness
of the project,
generate “buzz”



INPUT

Identify strengths,
weaknesses,
opportunities, and
threats (SWOT)



REFINEMENT

Refine issues,
explore
opportunities,
increase
stakeholder
buy-in



ACTION

Dedicate resources,
engage other
leaders

QUESTIONS?

ITEM 3.1.

THANK YOU

ATTACHMENT 6



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www.tipstrategies.com

*Based in Austin
with offices coast to coast*

NEXT STEPS





THANK YOU!

