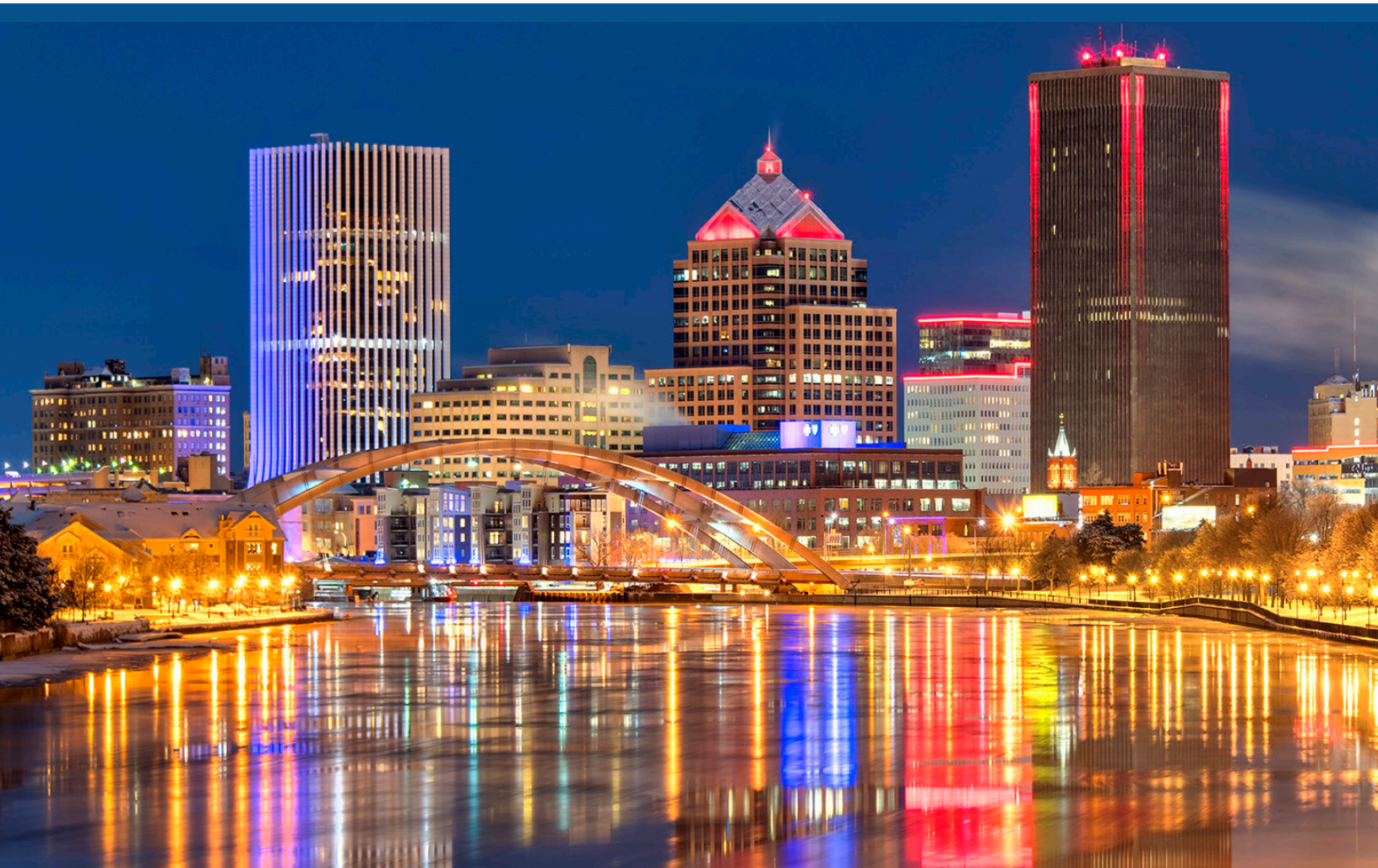




Proposal: Downtown Rochester BID Development Services



Proposed by:



&

URBAN PARTNERS

in association with:

Civic Ventures

**Glass House
Consulting**

March 23, 2022

URBAN PARTNERS

COMMUNITY & ECONOMIC DEVELOPMENT

325 Chestnut Street, Suite 506
Philadelphia, PA 19106
215 829-1901
www.urbanpartners.us

293 East Bay Street
Charleston, SC 29401
843 209-9749

March 23, 2022

Ms. Heidi Zimmer-Meyer, President
Rochester Downtown Development Corporation
Five Star Bank Plaza
100 Chestnut Street, Suite 1910
Rochester, NY 14604

Dear Ms. Zimmer-Meyer,

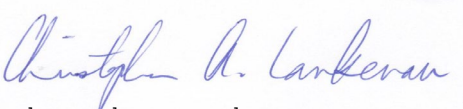
Urban Partners, through a partnership with David Feehan of **Civitas Consultants**, together with **Civic Ventures** and **Glass House Consulting**, is pleased to submit the following proposal to provide the Rochester Downtown Development Corporation (RDDC) with consulting services for instituting its first business improvement district (BID). As you will see in the proposal, the Civitas/Urban Partners team possesses the full spectrum of skills and experience necessary to complete this exciting assignment.

The Civitas/Urban Partners team has worked with numerous clients to successfully implement BIDs throughout the country and beyond. As President and CEO of the International Downtown Association, Mr. Feehan worked with members of BIDs throughout the world. He helped lead the team that organized the first BID in Central America. While he has also worked with BIDs in Canada, Europe, and South Africa, most of his experience is in the United States. Mr. Feehan has also created and managed a BID in Des Moines, Iowa. Urban Partners is currently working with a community organization in North Philadelphia to create a new BID in its commercial district. The firm previously worked with Mr. Feehan to successfully create a new bid in the Philadelphia suburbs. Civic Ventures and Glass House Consulting also bring significant experience to the team with successful BID efforts in communities as diverse as New York City and Sioux Falls, South Dakota.

This proposal contains a response to all items requested in the RFP. We have divided our suggested work plan into four phases that align with the requirements of the New York State law regulating the establishment of BIDs. Our fee reflects this scope of services. While we have offered a suggested methodology, we are open to modifying certain tasks to address specific concerns. Our intent is to provide you with the most useful product for the best value.

We appreciate the opportunity to present our team and our detailed approach for this assignment. Please feel free to contact me at (215) 829-1901 or clankenau@urbanpartners.us with any questions about our proposal. Mr. Feehan can be reached at (202) 288-0528 or civitas.dave@me.com.

Sincerely,



Christopher A. Lankenau, AICP
Principal

Table of Contents

Introduction..... 1

Team Overview 3

Qualifications 4

 Firm Qualifications 4

 Staff Roles and Qualifications..... 10

Relevant Projects & References20

Scope of Work.....26

Project Timeline.....31

Cost Proposal..... 32

Introduction

The Civitas/Urban Partners team has more than a 40-year track record of providing high quality services to our clients. The team members assembled for this project have successfully completed numerous business improvement district (BID) planning initiatives in communities throughout the state, nation, and the world. As this proposal will demonstrate, our team possesses the full spectrum of skills and experience necessary to complete a successful BID effort in Downtown Rochester as well.

The series of questions outlined in the RFP and addressed below, provide an appropriate starting point for introducing the components of this proposal:

1. *What services can you provide to assist communities like ours in the development of a new downtown business improvement district?*

Our team can provide all the services necessary for RDDC to develop a new BID. These services include:

- Planning (district delineation, case study examination)
- Technical analysis (database management, fee calculation)
- Community outreach (stakeholder engagement, survey administration, engagement of property owners)
- Facilitation (steering committee and staff coordination, meeting presentation)

See the Team Overview, Qualifications, and Scope of Work sections below for more detail on the services we will provide.

2. *What makes your firm unique in this field?*

Our team is unique for several reasons:

- We have worked with over 200 BIDs around the world in both the capacity of organizing and management
- We have experience with BIDs in New York State
- We have knowledge of and experience with the organization and operation of city government
- Several team members have extensive CEO experience
- We have experience in techniques of gaining community, stakeholder, and elected officials' support for BID formation

See the Team Overview and Qualifications sections below for more detail on why we are unique.

3. *In which communities have you guided the successful establishment of a BID?*

As mentioned, our team has worked in hundreds of communities—large and small—where successful BIDs have been implemented, including:

- New York, NY
- Des Moines, IA
- Minneapolis and St. Paul, MN
- Cleveland, OH
- Sioux Falls, SD
- Pittsburgh, Lebanon, and Souderton, PA
- Washington, DC
- Windsor, ON
- San Salvador, El Salvador
- Nassau, Bahamas

See the Qualifications section below for more detail on where we have worked on successful BID projects.

4. *What are the top three stumbling blocks you have found in your BID creation work?*

Creating a new BID can indeed involve multiple challenges. In our experience, the following are the top three:

- Acceptance of property owners towards paying a BID assessment
- Encouraging some tax-exempt entities that benefit from the BID to make a payment in lieu of the assessment
- Inability to contact property owners as many are absentee or are represented by agents, banks, etc.

Our Scope of Services below outlines a process that will hopefully minimize these challenges.

5. *What is your fee schedule for this kind of work, and how does the fee break out over a two- to three-year period?*

The team proposes a fee of \$83,042 for this work. The bulk of the fee will be expended from April 2022 (project kick-off) to October 2023 (plan submitted to City Clerk) when the BID plan is developed and most of the outreach occurs. For the subsequent year (through May 2024), the fee will go mainly toward continued outreach and any assistance with the legislative phase.

See the Cost Proposal and Timeline sections below for more detail on our proposed fee schedule.

Team Overview

We believe the Civitas/Urban Partners partnership exhibits a series of characteristics that distinguish the team from others and enable us to provide quality services and work products to our clients:

- We are an intentionally small team. RDDC can expect **high quality work from senior management staff**. We don't use interns and other junior level staff to conduct most of the analysis and then merely rubber stamp the deliverables.
- We have completed a vast array of BID planning efforts and economic development strategies that go far beyond research and quantitative analysis—**our strategies serve as detailed blueprints for communities** to realistically consider their assets and opportunities for growth, to exploit their competitive advantages, and to understand the required next steps and responsibilities involved in moving forward.
- Each staff member mobilized for this study has **decades of public engagement experience**. We skillfully conduct public meetings and smaller focus groups; prepare resident surveys; and make presentations to council meetings, neighborhood groups, and downtown development entities.
- We have a **proven track record of identifying a wide range of public and private funding opportunities** to support implementation activities.



Qualifications

Firm Qualifications



Our work for the Downtown Rochester BID will be led by **Civitas Consultants LLC**, formed in 2009 by David Feehan. Dave is a world-recognized expert in downtown revitalization who has worked with over 200 business improvement districts. For nearly a decade he served as president of the International Downtown Association, the worldwide network of BIDs. At Civitas, Dave has provided consulting services to many government agencies and civic organizations and has assessed BID/NID feasibility and assisted in their establishment in Pennsylvania as well as Connecticut, Minnesota, Maryland, Texas, New Jersey, Washington, D.C. and cities in South America, the Caribbean, El Salvador, New Zealand and Taiwan. He helped write BID legislation for the United Kingdom. Civitas will be the primary contact with RDDC.



Urban Partners will serve as the lead administrative consultant for this project, responsible for project coordination and the tasks outlined in this proposal. We are a firm that assists public, private, and non-profit clients with the planning and implementation of feasible development and revitalization efforts. Our work includes community-wide plans, district-based strategies, site specific assessments, and cultural/community facility feasibility. We provide sound real estate market analysis to identify the realm of alternatives and detailed fiscal and economic analysis to establish the long-term requirements of project development and sustainable operation that will lead to implementable real-time strategies. Since 1980, our attention to market and economic realities has helped clients to complete an extensive portfolio of revitalization and development projects.

We are also pleased to team with Michael Weiss of **Civic Ventures**, and Pat DiGiovanni of **Glass House Consultants**, both nationally recognized consultants in BID planning and creation. In addition to directing a BID in Brooklyn, NY, Mike has been instrumental in the formation of several BIDs in New York City as well as the founder and board member of several related non-profit organizations. Pat is a recently retired Executive of Centro San Antonio. He was the organization's CEO and oversaw the downtown Public Improvement District as well as the Downtown Alliance, a sister member organization. Prior to his tenure with Centro, Pat was the Deputy City Manager for the City of San Antonio.

Following is a more detailed firm description of Civitas and Urban Partners.

Civitas Consultants LLC

David M. Feehan

President

Summary

Civitas Consultants LLC is a Maryland-based consulting corporation formed in 2009 by David Feehan, a world-recognized expert in downtown revitalization. For more than forty years, Feehan has provided leadership and management to successful downtown and business district organizations, founded and directed a technical assistance center for community development organizations and a public policy organization, authored numerous books and articles, and taught at two universities. He is often quoted by news media throughout North America and elsewhere. He is a frequent speaker at conferences and meetings, recently speaking in Turin, Quebec, and Taipei, and has provided consulting services to many government agencies, organizations and associations. He has served on numerous boards of directors, and has chaired the boards of the International Downtown Association, the Responsible Hospitality Institute, Preserve Historic Dinkytown, and other organizations.

As the chief executive of three downtown organizations and one community development corporation, Feehan managed major real estate and infrastructure projects, successful business attraction and retention programs, and an award-winning parking system.

As the chief executive of two technical assistance centers, he provided organizational development, marketing, fundraising and other management support to more than 500 nonprofit organizations.

As a consultant, Feehan has helped downtown and business district organizations as well as units of government develop visions and missions, strategic plans, innovative programs, and transformational processes.

As an author and professor, he co-edited and wrote the most recognized textbook on downtown management, *Making Business Districts Work*, and is a frequent writer for journals and trade publications.

Management and Leadership

2001 – 2009	President and CEO -- International Downtown Association, Washington DC
1996 – 2001	President and CEO – Downtown Community Alliance, Des Moines, IA
1994 – 1996	Executive Director, Downtown and Community Development – Detroit Renaissance, Detroit, MI
1989 – 1994	President and CEO – Downtown Kalamazoo, Inc., Kalamazoo MI
1988 – 1989	Executive Director – Citizens League of Southwestern PA, Pittsburgh, PA
1982 – 1988	Executive Director – East Liberty Development, Inc., Pittsburgh, PA
1980 – 1982	Executive Director – Community Technical Assistance Center, Pittsburgh, PA

1973 – 1979 Executive Director – Minneapolis Communications Center, Minneapolis, MN

Consulting Experience

Selected examples as a private consultant:

- Montgomery County MD Pike District – Forming a Business Improvement District
- St. Paul MN – Organizational strategy for forming a BID
- Columbia MD – Serving as interim executive director for Downtown Partnership
- Pittsburgh PA – Funding strategy and serving as interim executive director for a community development corporation
- San Antonio TX – Transformation/restructuring of downtown revitalization program
- Pittsburgh PA – Strategic plan for South Side Community Council
- Columbia MD – Funding and program development strategy
- Moorhead MN – Concept framework and organizational development for new downtown organization
- Pittsburgh PA – Major fundraising strategy for crime reduction/affordable housing program
- Lebanon PA – Creation of a business improvement district
- Souderton PA – Creation of a business improvement district
- Pittsburgh PA – Board training and development, management consulting for a senior residence
- Provo UT – Parking advisory panel
- Washington DC – Strategic plan and board retreat for Golden Triangle BID
- Pittsburgh PA – Multi-neighborhood NID creation strategy
- Pittsburgh PA – Organization restructuring of Community Technical Assistance Center
- Billings MT – Expert Advisory Panel on city parking system
- San Antonio TX – Assessment of support for restructuring municipal parking system
- Pittsburgh PA – Assisting senior service center with dissolution
- San Salvador, El Salvador – Creation of a Business Improvement District
- Winnipeg, Manitoba – Downtown parking system assessment
- Pittsburgh PA – Assessment of CDCs/Development of NID funding toolkit
- Nassau, Bahamas – Creation of a new Business Improvement District
- Grinnell, IA – Development of a new vision for downtown
- Fargo, ND – Creation of a new downtown organization
- Queens, NY – Acquisition of City-owned parking facilities by CDC
- Las Vegas, NV – Strategic planning for downtown parking

Selected examples as IDA President facilitating Advisory Panels

- Austin TX – Retail strategic plan
- Boise ID – Parking and downtown vision
- Brooklyn NY – Retail strategy and organizational development
- Charlotte NC – Parking strategy and management program
- Cleveland OH – Creation of a Business Improvement District
- Colorado Springs CO – Downtown development strategy
- Collierville TN – Downtown vision and strategy
- Council Bluffs IA – Creation of new downtown organization
- Duluth MN – Funding strategy and implementation of a BID
- Fort Wayne IN – Downtown organization restructuring
- Lake Charles LA – Downtown vision and strategy
- Lincoln NE – Transforming downtown parking program
- Long Beach CA – Transforming downtown parking program
- Omaha NE – Creation of a BID
- Parkersburg WV – Siting and integration of new GSA facility
- Providence RI – Restructuring downtown parking program
- Seattle WA – Metro-wide transportation management strategy
- Spokane WA – Customer service plan for downtown parking
- Toledo OH – Integration of new federal facility into downtown plan
- Washington DC – Best practices strategy for program improvement
- Wheaton MD – Integrating new public facilities into master plan

- Windsor ON – Reorganizing and expanding BID
- Yakima WA – Organization and marketing strategy

Recognition

- Lee Kuan Yew WorldCity Prize nominee 2010
- University of Pittsburgh Distinguished Alumni Award 2008
- University of Pittsburgh– Distinguished Service Award (Pittsburgh)
- International Downtown Association – Major Projects Task Force (Des Moines)
- International Parking Institute – Award of Excellence (Kalamazoo)
- International Downtown Association – Arcadia Creek Project (Kalamazoo)
- International Downtown Association – Downtown Parking System (Kalamazoo)

Contact Information

- 1626 White Oak Vista Drive, Silver Spring MD 20904 * 202.288.0528 * civitas.dave@me.com

URBAN PARTNERS

COMMUNITY & ECONOMIC DEVELOPMENT

Philadelphia, PA + Charleston, SC

Urban Partners is a national community and economic development consulting firm that assists public, private, and non-profit clients plan and implement feasible development and revitalization efforts. Since 1980, our attention to market and economic realities has helped clients complete an extensive portfolio of revitalization and development projects. Our work includes community-wide plans, district-based strategies, site specific assessments, and cultural/community facility feasibility. We provide sound real estate market analysis to identify the realm of alternatives and detailed fiscal/economic analysis to establish the long-term requirements of project development and sustainable operation.



Downtown & Commercial District Revitalization

We develop overall revitalization strategies for entire downtowns and commercial districts, create site-specific economic development strategies, and assist in the implementation of our recommendations. Our experience involves retail, office, residential, entertainment, lodging and cultural activities - as well as supportive uses such as parking, circulation, infrastructure, and streetscape.



Market Research/Feasibility Analysis

We create specialized economic development strategies for projects having complex development needs, including military bases, hospital complexes, and properties with significant environmental remediation needs. We undertake comprehensive studies, recommend viable development alternatives, identify economic/fiscal impacts of development schemes, and assist in securing developers and project financing.



Community Planning & Municipal Assistance

We have a strong commitment to working with community development corporations, public agencies, and institutional partners on neighborhood revitalization issues. We create community master plans, identify specific projects, perform market and financial feasibility analysis, and structure the creative and workable financing strategies necessary to move complex urban development projects from conception to completion.



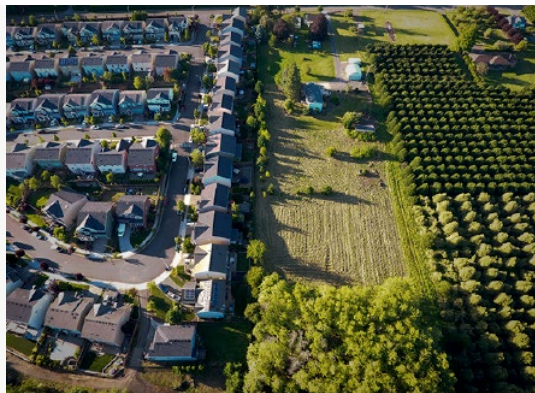
Housing Market Analysis & Strategy

We prepare detailed analyses of housing markets that include supply and demand analysis, forecasting of future housing needs, incentive programs to provide unmet demand, and affordable housing needs analysis. Our work usually involves the engagement of community stakeholders in formulating housing priorities. We also assist specific housing developments in identifying target markets and planning production strategies.



Cultural Heritage Economics

We assist cultural institutions, heritage areas, and recreational facilities in planning, financing, and implementing development projects and supportive programmatic activities that serve their mission and contribute to the tourism economy. We conduct economic impact analyses of cultural tourism activities that demonstrate the far-reaching impact of special exhibitions, festivals, and permanent arts, heritage and recreational programming on a region.



Smart Growth/Regional Planning

We are very active in transit-oriented development projects, cooperative regional planning efforts, and other smart growth initiatives that concentrate development in established urban areas, minimize sprawl development, and protect open space resources. Our services include policy tools such as transfer of development rights and other programs that facilitate implementation of sustainable development activities.

Staff Roles and Qualifications

For this project, we are assigning five staff members from the participating firms with the following roles:

- **David Feehan, Civitas Consultants, LLC**
Dave will be the lead consultant and initial primary contact with RDDC. In this role, Dave will ensure that all necessary steps for BID formation will be followed. He will identify case studies, lead the outreach and communication strategy, and work with the BID Formation Committee.
- **Christopher Lankenau, AICP, Urban Partners**
Chris, a Southern Tier native, will be the project manager and administrative contact, ensuring that the project remains on schedule and budget. Chris will manage the district ratepayer database and prepare the BID Plan. He will be a participant in the outreach process and will be the on-the-ground member of the team.
- **James Hartling, Urban Partners**
Jim will lend his technical expertise to the process ensuring that prospective assessment formulas, fees, and district boundaries are vetted.
- **Mike Weiss, Civic Ventures**
Mike will serve as the New York State BID expert, ensuring that the process for Downtown Rochester adheres to state law, particularly during the legislative process. Mike will work with the BID Formation Committee to enlist their input and involvement as necessary.
- **Pat DiGiovanni, Glass House Consultants**
Pat will lend his experience as an executive of a fellow river city and will provide input to the BID Formation Committee. Pat will also manage the needs-assessment survey and conduct any necessary outreach with city officials.

Detailed resumes for each participating staff person can be found on the following pages.

1626 White Oak Vista Dr.
Silver Spring MD 20904
202.288.0528
civitas.dave@me.com

DAVID M. FEEHAN

Experience

2009 – Present President – Civitas Consultants, LLC
Accomplishments (Consulting):

- Urban Revelopment Authority of Pittsburgh (assessment of eight Mainstreets programs for potential NIDs and creation of an on-line NID Toolkit; retail study for South Side community)
- City of Lebanon PA (organizing downtown supporters in collaboration with the City of Lebanon to create a Business Improvement District)
- Souderton PA Main Street Program (advising a successful campaign to create a Business Improvement District)
- Fargo Moorhead Area Foundation (developing a concept for a new downtown in conjunction with two universities and creating a new downtown management organization)
- Downtown Columbia MD Partnership (developing a funding plan for a new downtown organization)
- City of Provo UT (parking advisory panel)
- Bloomfield Development Corporation, Pittsburgh PA (managed the Little Italy community CDC for one year, secured \$700,000 in funding commitments)
- City of San Antonio and San Antonio Centro Partnership (restructuring the city's downtown organization, creating and facilitating an expert panel on streetcar route, facilitated staff and board retreats)
- Pittsburgh Partnership for Neighborhood Development (assistance to CDCs seeking to create NIDs)
- City of Houston (parking advisory panel)
- Pittsburgh's Bloomfield Development Corporation (restructured management, developed major programs, secured \$700,000 in new funding)
- Minneapolis/St. Paul Great Cities Coalition (helping CDCs form BIDs)
- Baltimore Midtown Community Benefits District (resolving organizational issues and conducting a board retreat)
- City of Fort Collins CO (parking advisory panel)
- Trenton Community Foundation (advising on BID and other downtown issues)
- Center City Development Office, City of San Antonio (staff retreat)
- Downtown Kalamazoo Incorporated (developing a strategy for moving from a development organization to a business district management organization)
- Golden Triangle BID in Washington DC (strategic plan and board retreat)
- Downtown Nassau (Bahamas) Partnership (creating a BID and development organization)
- Greater Downtown Council, Duluth MN (parking advisory panel and board retreat)
- Pittsburgh Downtown Partnership (advisory panels on parking, housing and planning for G-20 Summit)
- Bridgeport CT Downtown Special Services District (strategic plan)
- Johnson City TN Development Authority (assessing infrastructure opportunities)

- San Salvador Zona Rosa Corporacion (creating the first BID in Central America)
- Winnipeg MB Parking Authority (organizational development)
- Cedar Rapids IA Downtown Partnership (management of the municipal parking system)
- City of Maringa Brazil (exploring possibilities of a BID)
- International Downtown Association (conference and technical assistance management)
- Drexel University (training session on fundraising for CDCs)
- City of Auckland, New Zealand (BID creation)
- Regional Governments in Northern Taiwan (creation of BIDs)

2001 – 2009

President and CEO -- International Downtown Association, Washington DC

Accomplishments (Full time Employee):

- Increased membership by fifty percent in seven years.
- Set conference attendance records, including the largest conference in IDA history, the 2007 World Congress in New York.
- Secured more than \$500,000 in new technical assistance revenues.
- Created/authored new publications (*Making Business Districts Work* and *ABCs for Creating BIDs*); e-bulletin (*IDA Dialogue*).
- Expanded collaborative relationships with federal agencies, international associations, and industry groups
- Conducted more than 40 IDA Advisory Panels, board retreats and staff retreats in downtowns throughout the US, Canada and the Caribbean, including advisory panels in Spokane, Pittsburgh, Washington DC, Boise, Long Beach, Seattle, Council Bluffs, Tulsa, San Antonio, Boise, Fresno, Duluth, and Tucson; and board retreats in Pittsburgh, Mobile, Little Rock, and Albany.
- Increased revenues by more than 100 percent over seven years.

1996 – 2001

President and CEO – Downtown Community Alliance, Des Moines, IA

Accomplishments:

- Designed, created, and implemented a Business Improvement District. Through this program, quality of life crimes in the central business district were reduced by 30 to 70 percent, while employing a number of minority, low income, handicapped, and homeless people
- Staffed and managed an award-winning process to prioritize nearly \$1 billion in major project proposals, including a \$400 million enclosed rain forest, a new event center, downtown library, science center, and a world food and fiber institute. All of these projects, with the exception of the rain forest, are completed.
- Initiated, designed, developed several festivals and events, increasing visits to downtown by more than a million people a year, including an arts festival that ranked as high as third in the nation and a farmers market named one of the top five in the US by Bon Appetit magazine.
- Co-chaired the city's homelessness task force, which resulted in major changes in services to homeless individuals
- Established a formal relationship with the city's coalition of neighborhood organizations, reducing tension and increasing cooperation between these groups and the downtown organization
- At the request of seventeen area mayors, created and carried out the metro area's millennium celebration. Through this celebration, established a special fund for innovation in the arts at the Greater Des Moines Foundation

1994 – 1996

Executive Director, Downtown and Community Development – Detroit Renaissance, Detroit, MI
Accomplishments:

- Initiated and managed a \$40 million, 16-acre land acquisition project with financial backing of General Motors, Ford, Chrysler, and other major corporations and foundations, which culminated in the purchase of the former J. L. Hudson's department store and several other downtown properties. This site, called the Campus Martius project, is now redeveloped and provides jobs for thousands of Detroit area residents.
- Created the Greater Downtown Partnership, a new downtown organization that today manages redevelopment and revitalization of the CBD and peripheral areas. This organization coordinated preparations for the recent Super Bowl held in Detroit.
- Worked closely with several community organizations, including the Warren Connor Community Coalition, which had received an Annie Casey Foundation grant to build neighborhood leadership and citizenship.

1989 – 1994

President and CEO – Downtown Kalamazoo, Inc., Kalamazoo MI
Accomplishments:

- Managed the \$120 million Arcadia Creek redevelopment project, rebuilding the northern half of the downtown area. New projects included the Kalamazoo Oncology Center, a major treatment facility and the first joint project of Bronson Methodist Hospital and Borgess Medical Center; a new downtown campus for the Community College; a new science and history museum, renovation of the city's hotel/convention center complex, and a business incubator. This project, funded in part by the Kalamazoo Community Foundation, won international awards.
- Pioneered downtown organization management of the city's parking system, reducing customer complaints by 80 percent, increasing revenues by one-third over a three-year period, and serving as a model for many other downtown organizations.
- Served as a consultant to the Western Michigan University Evaluation Center, assessing MacArthur Foundation grants to Chicago CDCs.

1988 – 1989

Executive Director – Citizens League of Southwestern Pennsylvania, Pittsburgh, PA
Accomplishments:

- Founded and organized a regional civic public policy organization that conducted forums and published reports on riverfront development, regional tax-base sharing, and affordable housing.

1982 – 1988

Executive Director – East Liberty Development, Inc., Pittsburgh, PA
Accomplishments:

- Attracted 200 businesses to a blighted business district creating 2000 jobs. Established a technical assistance program for minority entrepreneurs.
- Secured \$80 million in new real estate investment, including a business incubator linked to Carnegie Mellon University, a new shopping center, condo conversion of a vacant warehouse, and restoration of an historic market house. Implemented a successful campaign to remove a failed pedestrian mall.
- Purchased and renovated historic buildings, including a vacant theater.
- Created a retail outlet store designed to provide low-skilled community residents with job training and career opportunities.
- Secured annual support from the Ford Foundation, Heinz Endowments, Pittsburgh Foundation, Mellon Bank Foundation, R. K. Mellon Foundation and other local foundations.

1980 – 1982

Executive Director – Community Technical Assistance Center, Pittsburgh, PA

Accomplishments:

- Organized and designed a program that assisted more than 50 community-based organizations in areas such as job creation, real estate development, program design, organizational development, and fundraising.

1979 – 1981

Consultant – Midwest Research Institute, Minneapolis, MN

Accomplishments:

- While attending the University of Pittsburgh School of Social Work, co-authored a study funded by the Charles Stewart Mott Foundation analyzing innovative methods of community communication.
- At the same time, while completing the required field placement, organized the Community Technical Assistance Center and helped organize a citywide community education program through the Allegheny Conference on Community Development.

1973 – 1979

Executive Director – Minneapolis Model City Communications Center, Minneapolis, MN

Accomplishments:

- Provided technical assistance to more than 400 nonprofit organizations throughout the Twin Cities and nationwide.
- Established the first computerized nonprofit accounting bureau in the nation through grants from local foundations.
- Through a multi-year grant from the Charles Stewart Mott Foundation, assisted “Stimulating the Neighborhood Action Process” (SNAP) groups in eleven cities from coast to coast.
- Received the “Horizons on Display” Bicentennial award from the US Department of Housing and Urban Development as one of the most innovative projects in the country.

1971 – 1973

Community Contact Coordinator/Grantswriter – Model City Communications Center, Minneapolis, MN

Accomplishments:

- Established successful projects and relationships with several community action and neighborhood development groups in the Model City area, including Harriet Tubman Women’s Shelter and the Urban League Street Academy.
- Secured grants from the City of Minneapolis and several local foundations for a number of communications and technical assistance programs.

1969 – 1971

Community Organizer – Pillsbury Waite Neighborhood Services, Minneapolis, MN

Accomplishments:

- Organized the Minneapolis Tenants Council, an effective advocacy organization that secured tenant protection legislation at the state level, and helped protect a neighborhood close to the University of Minnesota from being bulldozed for a high-rise development.

1968 – 1969

VISTA Volunteer – Mon Yough Community Action Committee, McKeesport, PA

- Organized groups in local housing projects to overcome discriminatory practices on the part of the local housing authority. Assisted in editing a local newsletter published by African American community leaders. Initiated a magistrates court observation program in conjunction with Neighborhood Legal Services and the League of Women Voters that resulted in significant changes in court operations.

Teaching

1997 – 2001

Adjunct Professor – University of Iowa School of Social Work
Courses: Organization and Community Practice; Integrated Practice; Human Services Administration; Community Economic Development; Advanced Practicum Seminar

1975-1977

Adjunct Professor -- Metropolitan State University, St. Paul, MN
Courses: Conflict Management, Community Development

Education

University of Pittsburgh School of Social Work – MSW 1981
Metropolitan State University – BA 1977

Honors and Awards

Lee Kuan Yew World City Prize (Nominee and finalist, 2011)
University of Pittsburgh Distinguished Alumni Award
University of Pittsburgh School of Social Work Distinguished Service Award
Pittsburgh Neighborhood Association – Gabor Kish Award
Pittsburgh East End Communities – Man of the Year Award
International Downtown Association – Des Moines Major Projects Task Force
Des Moines CityView Magazine – Person of the Year
Des Moines Business Record – Business Leader of the Year -- 2nd place
International Parking Institute – Award of Excellence (Kalamazoo Parking System)
International Downtown Association – Kalamazoo Arcadia Creek Project
International Downtown Association – Kalamazoo Downtown Parking System
US Department of Housing and Urban Development –Horizons on Display (Minneapolis)

Civic Activities

Chairman, Board of Directors, International Downtown Association
Chairman, Board of Directors, Responsible Hospitality Institute
Chairman, Board of Directors, American School Reform Town Meetings, Inc.
Treasurer, Board of Directors, Des Moines Arts Festival
Member, Board of Directors, Civic Center of Greater Des Moines
Co-Chair, Polk County Homelessness Task Force
Founding Member, Board of Directors, National Nonprofit Management Association
Member, National Business Incubator Association
Board of Directors, Pittsburgh Neighborhood Alliance
Member, Inaugural Class, Leadership Pittsburgh
Board of Directors, Pittsburgh Salvation Army
Member, Mayor's Commission on Women in Renaissance II, Pittsburgh
Board of Directors, Unity Settlement Foundation (Minneapolis)

Christopher Lankenau, AICP

Principal



EDUCATION

University of Vermont

Bachelor's in Geography

Michigan State University

Master's in Urban and Regional Planning

MEMBERSHIPS & AFFILIATIONS

American Planning Association

American Institute of Certified Planners (AICP)

Fairmount Community Development Corporation - Vice President, Board of Directors

CONTACT INFORMATION

123 S. Broad Street, Suite 2042
Philadelphia, PA 19109

(215) 829-1901

clankenau@urbanpartners.us

<http://www.urbanpartners.us>

Christopher Lankenau, AICP, is a planner and economic development consultant with 25 years of professional experience. Since joining Urban Partners in 2006, Chris has managed a variety of projects ranging in scale from single sites to large master plans on behalf of municipalities, community development corporations, and non-profit organizations in several states. His current work focuses on community revitalization and economic development in both commercial and residential areas, including real estate market analysis, demographic analysis, and fiscal impact analysis, as well as economic feasibility analysis for adaptive use and new development projects. Chris also has experience in community outreach, transportation planning, and land use planning.

Prior to joining Urban Partners, Chris was a Senior Associate at the Pennsylvania Economy League, where he focused on community revitalization in Southeastern Pennsylvania's older core communities. Chris also has significant planning experience as a consultant with the Philadelphia firm of Kise Straw & Kolodner (now KSK Architects, Planners and Historians), where he managed a variety of planning projects with a particular focus on commercial district and community revitalization. Previously, Chris also held staff positions with county planning agencies, serving as planner for the Montgomery County Planning Commission (PA), as well as the Maryland National Capital Park and Planning Commission.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Commercial District/Downtown Revitalization

- North Broad Business Improvement District (Philadelphia, PA)
- Souderton Business Improvement District Feasibility Plan (Souderton, PA)
- Broad & Erie Transportation and Community Development Plan (Philadelphia, PA)
- Downtown Boyertown Vision & Action Strategy (Boyertown, PA)
- Downtown Glassboro Arts and Entertainment District Plan (Glassboro, NJ)
- Brownsville Road Commercial Node Development Strategy (Pittsburgh, PA)
- East End Market-Based Economic Development Strategy (Pittsburgh, PA)
- Hagerstown City Center Plan (Hagerstown, MD)
- Martinsburg Mills & Rail Corridor Revitalization Initiative (Martinsburg, WV)
- Downtown Etna Commercial Revitalization Analysis (Etna, PA)
- Englewood Downtown Master Plan (Englewood, NJ)

James E. Hartling

Partner



EDUCATION

Princeton University

Bachelor's in Mathematics

University of California at Berkeley

Master's in Planning

MEMBERSHIPS & AFFILIATIONS

Entrepreneurworks - Chairman,
Board of Directors

Local Initiatives Support
Coalition (LISC) Philadelphia -
Advisory Board

Community Design
Collaborative, Advisory Board

CONTACT INFORMATION

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James Hartling has served as partner-in-charge for most of Urban Partners' economic development projects and has been responsible for examining the market feasibility of many large-scale development and redevelopment projects since the firm's inception in 1980. He has directed the firm's downtown revitalization efforts in numerous cities in the mid-Atlantic and East Coast, and has prepared and helped implement neighborhood housing and commercial revitalization strategies in both large cities and smaller communities. Additionally, he has directed the firm's work involving the planning and development of new village centers and transit-oriented developments, as well as significant participation in the establishment of transfer of development rights programs (TDR) in New Jersey and Pennsylvania. He has also completed numerous studies documenting the regional tax and employment impacts of major cultural institutions.

Mr. Hartling had over ten years of experience as an economic and social planner prior to founding Urban Partners. From 1977 to 1980, he administered \$15 million annually of CDBG and EDA funds as Deputy Director for Economic Development of Philadelphia's Community Development program. Previously, Mr. Hartling was on the faculty of the University of Texas teaching in both the graduate planning and public affairs programs. There he conducted research and training projects on economic and community development and human services delivery. He has also held staff positions with planning and development agencies in Texas, California, and New Jersey.

HIGHLIGHTS OF RELEVANT PROJECT EXPERIENCE:

Commercial District Revitalization

- Reading Strategic Econ. Dev. Initiative (Reading, PA)
- Allentown Arts District Master Plan (Allentown, PA)
- Englewood Downtown Master Plan (Englewood, NJ)
- Downtown Savannah Master Plan (Savannah, GA)
- Arts & Entertainment District Plan (Glassboro, NJ)
- Bridging the Busway Transit-Based Plan (Pittsburgh, PA)
- Downtown Etna Commercial Revitalization Analysis (Etna, PA)
- Swarthmore Town Center Revit. Strategy (Swarthmore, PA)
- Montclair Town Center Development Strategy (Montclair, NJ)

Organizational/Strategic Planning

- PA Parks Maintenance Institute (Statewide PA)
- Evaluation of Community Development Corps. (Phila., PA)
- Greater Germantown Housing Development Corp. (Phila., PA)
- Habitat for Humanity Philadelphia Strategic Plan
- Preservation Alliance for Greater Philadelphia Strategic Plan

RESUME

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(mobile) 646 739-5391

Work History

June, 2015 – Present **Treasurer, Myrtle Avenue (Brooklyn) District Management Association, Inc.**

September, 2011 – Present **Consultant** operating under own company name as Civic Ventures Co.
Strategic & Urban Planning, Intergovernmental & public affairs, lobbying, not-for profit management

January, 1996 – September, 2011 **Executive Director, MetroTech Business Improvement District**
Responsible for overall administration and management of \$2.6 million+ budget of non-profit business support organization.

January, 1987 – December, 1995, **Chief of Staff and Chief Administrative Officer, NYC Department of Transportation**

Managed agency budget (\$2 billion/ year) and personnel divisions of very large City agency (8,000 employees). Supervised Community and Intergovernmental Affairs Unit, Press, Communications Offices, Agency Inspector Generals' Office, Vehicle Maintenance and Repair (3,500 vehicles – 5 repair garages and 100 auto mechanics). Managed Special Projects such as first Red Light Camera procurement and installation in NYC.

September, 1961 – December, 1986, **Teacher of Physics, High School Guidance Counselor and Assistant Principal, Brooklyn Technical High School, Brooklyn, NY**

Community and Non-Profit Activity

Founder, Flatbush Development Corp, non-profit community development corporation (1975)

Member and Vice-Chair, Brooklyn Community Board #14 (1975 – 1985)

Founder, Brooklyn Technical HS Alumni Association (current Board member)

Past Chair, International Downtown Association

Past Chair, NYC BID Managers Association

Founder and Treasurer, Brooklyn Golf Alliance Inc (not-for-profit)

Education

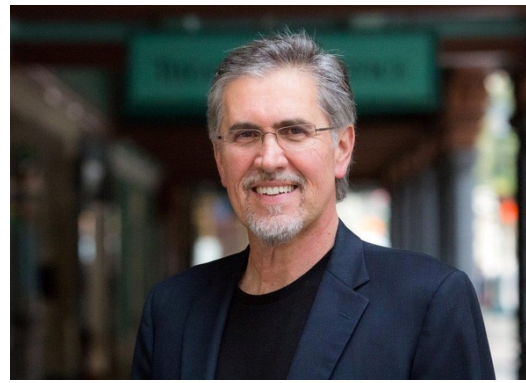
B.S., Physics - Brooklyn College

M.S. Educational Psychology, Yeshiva University

Coursework in Educational Administration, Business Process Reengineering, attended many conferences and seminars in Strategic Planning, Downtown Management and Development

Pat DiGiovanni Bio

Pat DiGiovanni is a retired President and CEO of Centro San Antonio; a 501(C)3 corporation created and focused on a vibrant and prosperous downtown that benefits the entire San Antonio community. Centro also managed the downtown Public Improvement District(PID). Previously, Pat served the community as Deputy City Manager of the City of San Antonio. In addition, he has held several executive positions over his 35 year career including City Manager of Kalamazoo, Michigan.



In his 5 years as Centro's CEO, Pat established Centro as a key partner with the public and private sector. He led the restructuring and rebranding of Centro, developed a long range plan for the organization, and collaborated with the board on a number of initiatives to partner with the City, County and other key public sector entities.

Pat has led the creation of the Zona Cultural, a state-designated cultural district, design of a retail strategy for the Houston Street corridor, investment in the transformation of Travis Park, and the launch of several free community events to activate public spaces in downtown. Pat also spearheaded the creation of a new downtown brand, which launched in the Fall of 2015.

In 2016, Centro led and facilitated its partnership with private sector stakeholders on the Broadway Cultural Corridor and Zona Cultural conceptual design projects. These transformational projects, along with Hemisfair Civic Park, were approved by citizens in the City's 2017 bond program, and will bring over \$150M of public investment to downtown San Antonio.

As Deputy City Manager, Pat had management oversight at one time or another of nearly every City department. He oversaw key code revisions to support the City's "No Kill" animal care goal, implemented a non-profit model for golf operations, and facilitated efforts to help secure vital military missions in San Antonio as well as the protection of two endangered species. DiGiovanni negotiated countless real estate and economic transactions that positioned the city for growth, and development agreements that brought hundreds of jobs to the urban core. He led the "Housing First" strategy and policy development that produced over 10,000 new housing starts in the center city during Mayor Castro's "Decade of Downtown". He was a key member of the Riverwalk extension and redevelopment team and he led the downtown development team that created new housing starts along the north and south river extensions.

In 2019, Pat started Glass House Consulting, LLC to advise and assist Executive and Board leadership in challenging times through strategy and organizational development. Pat recently led a team of consultants on the Sioux Falls downtown Business Improvement District renewal plan.

Pat currently serves on the Board of the San Antonio Independent School District Foundation where he is Chair of the Governance Committee and a member of the Executive Committee. Pat also serves on the Urban Land Institute Local Council and leads the Urban Development Committee.

Pat's wife, Alicia, works for the Marriott Rivercenter and Marriott Riverwalk properties in San Antonio. He has three children, Anne, an attorney in Los Angeles, and twin sons, David and Paul who are independent workers in web development and marketing.

Relevant Projects & References

Currently, the Civitas/Urban Partners team is completing the North Broad Renaissance BID project in Philadelphia and Civitas is completing the Downtown Sioux Falls BID plan with Glass House Consulting. Prior to these efforts, the most recent BID formation projects completed by the team are:

- Downtown Lebanon BID – Lebanon, PA
- Souderton BID – Souderton, PA
- Downtown Columbia Partnership BID – Columbia, MD

Below is a list of references for projects completed by Civitas and Urban Partners. The qualification sheets on the following pages describe the services rendered by the team for various relevant projects.

1. **Sherry Capello**, Mayor
City of Lebanon
Lebanon, PA
(717) 821-1054
scapello@lebanonpa.com
2. **Joanne Coppens**, Manager
Souderton Telford Main Streets
Souderton, PA
(215) 723-6627
joanne@stmainst.org
3. **Kristi Stokes**, President
Greater Downtown Council
Duluth, MN
(218) 727-8549
kstokes@downtownduluth.com
4. **Leona Agouridis**, Executive Director
Golden Triangle BID
Washington, DC
(202) 463-3400
kstokes@downtownduluth.com
5. **Josette Fitzgibbons**, Main Street/Elm Streets Manager
Urban Redevelopment Authority of Pittsburgh
Pittsburgh, PA
(412) 255-6686
jfitzgibbons@ura.org



Project Profile:

North Broad Business Improvement District Plan

Location:

Philadelphia, PA

Client:

North Broad Renaissance

Collaborators:

Baker & Company, LLC
Civitas Consultants LLC

Completion Date:

2020

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The North Broad Renaissance (NBR), is a non-profit organization whose primary role, in partnership with community stakeholders, is to revitalize the community, create opportunities for businesses and residents, and improve the economic power and overall quality of life along North Broad Street from City Hall to Germantown Avenue. To enhance and sustain the services it provides, NBR pursued the potential to create a business improvement district (BID) along the North Broad Street corridor.

A BID is a formal entity that allows property and business owners to come together to make a collective contribution to the improvement of their commercial district. BIDs deliver a range of services over-and-above normal City services and invest in the long-term economic development of their districts. Funds for BID programs and services are generated from a special assessment paid by the benefited property owners directly to the organization that manages the BID's activities.

To explore a BID for North Broad, NBR retained a team led by Urban Partners to conduct community outreach, lend expertise to the BID formation process, and prepare the BID plan. The Plan outlined all required elements of the Act for establishing a BID, including identifying district boundaries, eligible properties, proposed services, revenue sources, and organizational structure. Due to the economic challenges faced by area small businesses as a result of the COVID-19 pandemic, City Council decided to postpone the BID formation process in 2020.

Key services performed

- Property Assessment Research
- Business Plan Creation
- Stakeholder Engagement
- Public Presentation

Project Profile:

Souderton Business Improvement District Plan

Location:
Souderton, PA

Client:
Souderton Telford Main Streets,
Borough of Souderton

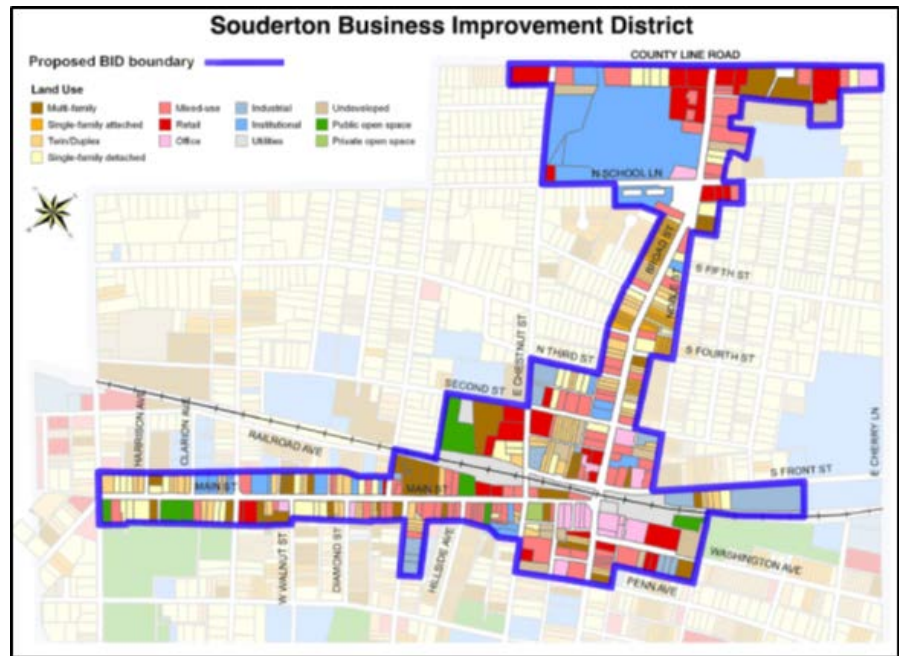
Collaborators:
Civitas Consulting,
Carter Van Dyke Associates

Completion Date:
2014

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The Borough of Souderton and Souderton Telford Main Streets hired Urban Partners to examine the potential to create a Business Improvement District (BID) in Souderton. A BID is a specific geographic area consisting of a group of property and business owners that cooperate financially to provide mutually-beneficial services throughout the defined area. Recognizing that municipal revenues are often insufficient to provide various desired services, the General Assembly of the Commonwealth of Pennsylvania created the Neighborhood Improvement District Act of 2000, authorizing municipalities to create BIDs.

Working with Souderton Telford Main Streets, Urban Partners created a business plan for the Souderton BID enlisting feedback from owners of commercial properties located in Souderton. The plan outlined all required elements of the Act for establishing a BID, including district boundaries, eligible properties, proposed services, revenue sources, and organizational structure.

Pursuant to the Act, for a BID to be created, at least 40% of the property owners within the BID district proposed in the final plan must file objections to the BID plan. No objections were filed, and the Souderton BID successfully took effect in 2015.

Key services performed

- Property Assessment Research
- Business Planning
- Stakeholder Engagement
- Public Presentation

Project Profile:

Boyertown Vision & Action Strategy

Location:
Boyertown, PA

Client:
Building a Better Boyertown

Collaborators:
Barton Partners,
Downtown Dynamics

Completion Date:
2017

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Building a Better Boyertown (BBB), Boyertown's Main Street and community development corporation, retained a multi-disciplinary professional planning team to prepare a community visioning and implementation plan for downtown Boyertown. While BBB's revitalization efforts have resulted in the implementation of several successful projects, the announced closure of National Penn Bank's former headquarters in downtown Boyertown presents a challenge to the economy of the Borough and surrounding area. This plan will provide BBB with a roadmap and guiding vision and offers specific implementation recommendations for improving downtown Boyertown and strengthening the local economy.

As part of this effort, Urban Partners conducted a real estate market assessment for downtown Boyertown, including retail, office, and rental housing. This analysis identified the range of feasible uses that could potentially support a more active mixed-use environment in the downtown area. Using the market analysis as a guide, Urban Partners assessed various development alternatives to identify their financial feasibility. Urban Partners also assessed financing resources available to facilitate the preferred development approach.

Key services performed

- Real Estate Market Analysis
- Financial Feasibility Analysis
- Site Planning
- Stakeholder Engagement
- Public Presentation





Project Profile:

Downtown Etna Commercial Revitalization Strategy

Location:
Etna, PA

Client:
Borough of Etna

Collaborators:
Environmental Planning and
Design

Project Completion:
2018

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Etna is a borough on the Allegheny River across from the City of Pittsburgh. It was named after the volcano Mount Etna, a reference to blast furnaces and steel mills once located there. As the community works to improve its economy, it has undertaken a multi-faceted effort to revitalize its downtown. This has involved strategies for improving specific blighted properties.

The Borough retained Urban Partners to assist with the revitalization planning in the downtown area. This effort focused on rehabilitating properties with vacant and underutilized ground-floor commercial spaces along Etna's primary downtown corridor – Butler Street. Of particular focus was the 323-399 block.

Our work for this project included an evaluation of property characteristics on the block - both physical and economic - including ground floor uses, recent sales, current rents and property ownership. In addition, a retail market assessment was conducted to understand the demand and opportunities for commercial ground-floor uses appropriate for the downtown. We identified approximately 60,000 square feet of retail opportunity, especially restaurants.

Subsequent to that analysis, Urban Partners provided the Borough with a revitalization 'game plan' focusing on priority nodes of Butler Street and engaged key property owners in advancing that vision.

Key services performed

- Real Estate Market Analysis
- Stakeholder Engagement
- Implementation Strategies

Project Profile:

The Community's City Center Plan

Location:

Hagerstown, MD

Client:

City of Hagerstown

Collaborators:

NV5

Completion Date:

2014

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To assist with implementing the 2012 Sustainable Community Plan, the City of Hagerstown retained Urban Partners to undertake an economic analysis of the Downtown and to identify eight catalytic initiatives to generate momentum and investment. The identification and fine-tuning of these initiatives came as the result of broad community engagement with the Urban Partners team spending more than 130 hours collecting input and feedback through a variety of focus groups, interviews, and community workshops. These catalytic initiatives constitute The Community's City Center Plan.

The eight Catalytic Initiatives include office development, expansion of the Maryland Theatre, support for expansion of the University System of Maryland branch, a hotel/conference center and commemorative park, new and rehabbed housing centered on a new trail, expansion of downtown arts programming, expanded operations of the downtown farmers market, and expanded home ownership strategies. Within ten years, these eight initiatives are projected to result in: 463,000 SF of new development; annual increase of 60,000 Downtown audiences to performance venues; creation of 875 new full-time equivalent jobs; development of 178 new or rehabilitated housing units; and increase of more than \$1.8 million in City and County governments tax revenues annually.

Key services performed

- Downtown Revitalization
- Economic Development Assessment
- Implementation Strategy
- Stakeholder Engagement
- Public Presentation



Scope of Work

Our team’s methodology for establishing the Downtown Rochester Business Improvement District is outlined below in a scope of services proposed in accordance with *NY General Municipal Law (GMU), Chapter 24, Article 19-A, Business Improvement Districts*.

Phase 1: Organizing & Information Gathering

■ Task 1.1: Project Kick-Off Meeting (Meeting #1)

Following Rochester City Council’s authorization to prepare a BID district plan, the Urban Partners/Civitas team will begin the project by meeting with Rochester Downtown Development Corporation (RDDC) staff and the Rochester Downtown Partnership’s (RDP) BID Formation Committee created to support the planning process. This first meeting will provide us the opportunity to clarify our project approach, potentially revise the scope of services to meet specific staff and BID Committee concerns, and to obtain input about the study area and project objectives. We will discuss the role that the BID Committee will play in the study and confirm meeting and decision-making points required throughout the process. We will also identify a roster of stakeholders to be interviewed by the Urban Partners team early in the process—potentially consisting of representatives from RDP.

■ Task 1.2: Downtown Rochester Field Visit

While in Rochester for the project kick-off meeting, members of the Urban Partners/Civitas team will tour the potential BID area to understand the physical features and economic conditions of the district including its business composition, any vacancies, street and sidewalk conditions, and public spaces. The tour could be conducted with members of the RDDC staff and BID Formation Committee.

■ Task 1.3: Review of Existing Documents

The Urban Partners/Civitas team will obtain and review any available economic development plans and documents pertinent to this study to gain a complete understanding of past, recent, and current initiatives and policies related to a BID formation in Downtown Rochester.

■ Task 1.4: Relevant Case Studies

The Urban Partners/Civitas team will compare Downtown Rochester to other similar cities with BIDs through the creation of case studies. These case studies for peer cities will identify numbers and types of properties included in the BID, services provided, operating budgets, and management structures. This exercise will allow the team to understand best practices and

successful models employed by other BIDs that can be applied to Downtown Rochester's efforts. One-page summaries will be prepared for each peer city.

■ **Task 1.5: Tentative BID Boundary Definition**

With input from RDDC staff and the BID Formation Committee, the Urban Partners/Civitas team will define a preliminary boundary for the Downtown Rochester BID. While this may change during the planning process, it establishes a baseline for properties to include in the district. A map will be produced delineating the tentative BID boundary.

■ **Task 1.6: Database of District Property Owners and Tenants**

Based on the tentative BID boundary, the Urban Partners/Civitas team will develop and manage an Excel database of property owners and commercial tenants within the proposed BID district using data acquired from the City of Rochester Assessor's Office. The database will include such information as property addresses, owner mailing addresses, property type and use, square footage, and assessed values. We will work with RDDC staff to acquire contact information (email address and phone number) for all owners and tenants within the district where possible.

■ **Task 1.7: Review of BID Boundary and Database (Meeting #2)**

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formation Committee to review the tentative district boundary as well as discuss the potential composition of the BID based on the database of owners and tenants. We will identify any necessary revisions and refinements to the boundary.

■ **Task 1.8: Engagement of Key Stakeholders**

The Urban Partners/Civitas team will interview the key stakeholders identified in Task 1.1 individually by phone or video technology. We will collect candid feedback around issues and opportunities related to the BID, specifically querying interviewees on the value of potential services, any services or activities that are perceived as missing, and where there are potential collaborative opportunities.

Phase 2: Planning

■ **Task 2.1: Needs-Assessment Survey**

With feedback from RDDC staff and the BID Formation Committee, the Urban Partners/Civitas team will prepare a needs-assessment survey to be distributed to each property owner and commercial tenant in the proposed BID district. The survey will be a vehicle for initial outreach to owners and tenants—a means for introducing the BID concept to the Downtown Rochester community and getting preliminary feedback. We will distribute a link to an on-line survey tool via email. If necessary, RDDC staff will assist with distributing surveys in-person to any business owners that may not have

online access. We will collect, tabulate, and evaluate survey results. Findings will help determine suggested services and improvements outlined in the forthcoming BID Plan.

■ **Task 2.2: Review of Needs-Assessment Survey (Meeting #3)**

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formation Committee to review the needs-assessment survey results. Based on the combined feedback from the survey and key stakeholder interviews, we will discuss a list of potential services to be provided by the Downtown Rochester BID as well as budgetary needs required to fund those services. Services could include cleaning, safety, maintenance, greening, business attraction and retention, and personnel/administration, among others. Considering the potential budget, the Committee will assist the team with formulating an assessment rate or other fee collection methodology.

■ **Task 2.3: Alternative BID Models**

Considering the potential budget, the Urban Partners/Civitas team will create and test different assessment formulas and BID boundaries to achieve the budget necessary to support the services provided by the Downtown Rochester BID. We will work with RDDC staff and the BID Formation Committee to reach an acceptable and sustainable model.

■ **Task 2.4: Preliminary BID Plan**

Using the information acquired from the above tasks, the Urban Partners/Civitas team will prepare a Preliminary BID Plan for the proposed Downtown Rochester Business Improvement District. The five-year business plan will include all required documentation and methodologies in accordance with *NY General Municipal Law (GMU), Chapter 24, Article 19-A, Business Improvement Districts*. These include:

- District map;
- Description of district boundaries;
- Description of present and proposed land uses;
- Description of the proposed improvements;
- The total annual amount proposed to be expended for improvements, maintenance, and operation;
- The proposed sources of funding;
- The proposed time for implementation and completion of the BID plan;
- Any proposed rules and regulations applicable to the district;
- A list of the properties to be benefited;
- A statement of the calculation or methods (formula) by which the expenses of the district will be imposed upon benefited real property, in proportion to the benefit received by such property;
- Identification of the district management association.

Phase 3: Outreach

■ Task 2.5: Review of Preliminary BID Plan (Meeting #4)

The Urban Partners/Civitas team will meet in-person with RDDC staff and the BID Formation Committee to review the Preliminary BID Plan. We will identify any necessary revisions and refinements to the document.

■ Task 3.1: Establishment of Communications/Outreach Strategy

The Urban Partners/Civitas team will meet establish a communications and outreach strategy that will ensure support for the proposed BID among all impacted stakeholders, including the media. The team will produce marketing materials necessary to effectively convey the benefit and proposed functions of the Downtown Rochester BID, and to clearly explain the financial commitment and return of involved property owners. Materials produced will include an executive summary of the Preliminary BID Plan, handouts, mailings, meeting notices, and signature ballots. In addition, we can prepare text appropriate for placement on RDDC's website and social media sites that are available for this project.

■ Task 3.2: Review Communications/Outreach Strategy (Meeting #5)

The Urban Partners/Civitas team will meet virtually with RDDC staff and the BID Formulating Committee to review the communications and outreach strategy. This will include a discussion of community meeting dates and formats, information distribution, and the marketing materials produced by the team.

■ Task 3.3: Community Meetings 1 & 2

The Urban Partners/Civitas team will organize two community meetings to further raise awareness of and secure support for the BID among property and business owners and tenants. Prior to the meetings, we will request RDDC's assistance with securing meeting dates, locations, printing and packaging marketing material related to the meetings, distributing materials to property owners via mail and email, and advertising for the meetings. We will prepare a PowerPoint presentation for the meetings to inform the community about the BID process and its benefits, as well as present the BID Plan, budget, and proposed assessment.

■ Task 3.4: Solicitation of Letters of Support

Working with RDDC staff and the BID Formulating Committee, the Urban Partners/Civitas team will solicit letters of support for the Downtown Rochester BID from property owners, merchants, residents, institutions, and other stakeholders including elected officials, and other area entities.

Phase 4: Legislative

■ Task 4.1: Plan Submittal to Mayor

With the BID Plan approved by the BID Formulating Committee and significant outreach conducted, the Urban Partners/Civitas team will deliver

the Preliminary BID Plan to Mayor Evans. Any suggested revisions will be made to the document prior to submitting it to the City Clerk.

■ **Task 4.2: Plan Submittal to City Clerk**

Upon review of the Mayor, the Preliminary BID Plan and letters of support will be delivered to the Rochester City Clerk.

■ **Task 4.3: Assistance with Public Notice Mailings**

Following the BID Plan's submittal to the City Clerk, Rochester City Council will adopt a resolution announcing that the Downtown Rochester BID Plan is on file and a hearing will be held regarding the Plan. The resolution will state that any property owner within the district objecting to the Plan must file an objection at the Office of the City Clerk within 30 days of the hearing. The legislative body will publish the resolution in a public newspaper. It is at that time—no less than ten nor more than thirty days before the date set for the hearing—the legislative body will require a copy of the resolution or a summary thereof to be mailed to each owner of real property within the proposed district as well as the tenants of each building within the proposed district. The Urban Partners/Civitas team will work with RDDC staff and the BID Formulating Committee to distribute the required public notice mailing.

■ **Task 4.4: Ongoing Outreach Efforts**

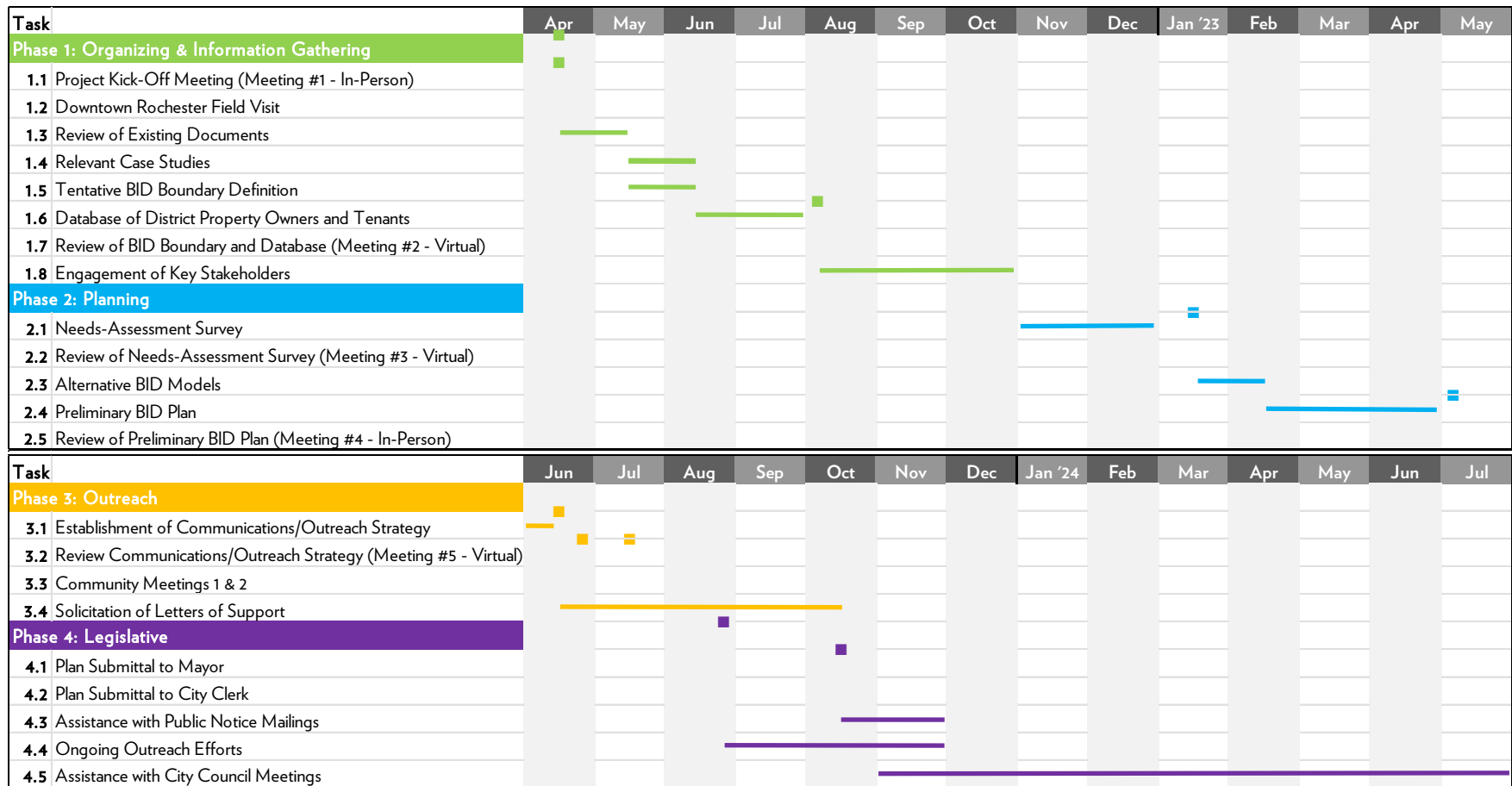
With assistance from the BID Formulating Committee, the Urban Partners/Civitas team will continue outreach efforts to the BID stakeholder community during the legislative phase to secure acceptance and support documentation. This could include attending meetings with property owners, merchants and related individuals, and stakeholders. Also, marketing material prepared in Task 3.2 and any materials prepared for the Community Meetings in Task 3.3 can be further distributed during this effort.

■ **Task 4.5: Assistance with City Council Meetings**

The Urban Partners/Civitas team will support RDDC staff and the Committee by attending the remaining Rochester City Council meetings necessary for final BID approval, including the approval of forwarding the Plan to the New York State Controller for review and approval, approval of the creation of the BID assessment district, and approving RDP as the BID management entity. At these meetings we can present details and answer questions regarding BID services, projects, assessment, budget, and management structure. We assume we could attend these meetings virtually.

Project Timeline

The Civitas/Urban Partners team is prepared to provide services to RDDC for implementing the Downtown Rochester BID through July 2024, when it is anticipated that the BID will begin operations, assuming a start date in early April 2022. Below is our proposed schedule in relation to each task, highlighting approximate points when specific meetings and work tasks would potentially occur. We are open to any modifications to this schedule.



Cost Proposal

The Urban Partners team is prepared to provide services to RDDC for implementing the Downtown Rochester BID for a total project fee of **\$83,042**, which includes all professional and out-of-pocket expenses associated with our work. Out-of-pocket expenses, which consist of travel, document production, and necessary data purchases, will be billed at cost. We are flexible and willing to consider modifications to the scope tasks and fee.

	TOTAL	Civitas	Urban Partners	Civic Ventures	Glass House		
Task	All Staff	Fehan	Lankenau	Hartling	Weiss	DiGiovanni	Total
Phase 1: Organizing & Information Gathering							
1.1 Project Kick-Off Meeting (Meeting #1 - In-Person)	24	8	8		8		
1.2 Downtown Rochester Field Visit	24	8	8		8		
1.3 Review of Existing Documents	12	3	4		3	2	
1.4 Relevant Case Studies	16	4	8		4		
1.5 Tentative BID Boundary Definition	14	3	4	4	3		
1.6 Database of District Property Owners and Tenants	24	0	24				
1.7 Review of BID Boundary and Database (Meeting #2 - Virtual)	10	2	4		2	2	
1.8 Engagement of Key Stakeholders	36	10	16			10	
Total	160	38	76	4	28	14	\$29,960
Phase 2: Planning							
2.1 Needs-Assessment Survey	52	2	8		2	40	
2.2 Review of Needs-Assessment Survey (Meeting #3 - Virtual)	17	2	4	4	2	5	
2.3 Alternative BID Models	18	5	8		5		
2.4 Preliminary BID Plan	62	6	32	4	10	10	
2.5 Review of Preliminary BID Plan (Meeting #4 - In-Person)	16	0	8		8		
Total	165	15	60	8	27	55	\$31,232
Phase 3: Outreach							
3.1 Establishment of Communications/Outreach Strategy	27	5	16		6		
3.2 Review Communications/Outreach Strategy (Meeting #5 - Virtual)	10	3	4		3		
3.3 Community Meetings 1 & 2	16	0	16				
3.4 Solicitation of Letters of Support	13	5	8				
Total	66	13	44	0	9	0	\$12,176
Phase 4: Legislative							
4.1 Plan Submittal to Mayor	2	0	2				
4.2 Plan Submittal to City Clerk	2	0	2				
4.3 Assistance with Public Notice Mailings	8	0	8				
4.4 Ongoing Outreach Efforts	13	5	8				
4.5 Assistance with City Council Meetings	16	0	16				
Total	41	5	36	0	0	0	\$7,674
Total Task Hours	432	71	216	12	64	69	
Hourly Billing Rates	-	\$210	\$184	\$249	\$150	\$200	
Task Costs	\$81,042	\$14,910	\$39,744	\$2,988	\$9,600	\$13,800	
Reimbursable Expenses (Travel, Data Purchase, etc.)	\$2,000						
Total Costs	\$83,042						