



# OAKLAND BUSINESS IMPROVEMENT DISTRICT

## REQUEST FOR PROPOSAL

### *OBID Board of Directors Comprehensive Strategic Plan How Innovation Emerges and Anchors a District*



Issued by the Oakland Business Improvement District  
July 9, 2019

**Due: 5:00 p.m. EST, Monday July 29, 2019**

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## I. Overview

### A. About the OBID Strategic Plan Project

To prepare for the impending exponential growth of the City of Pittsburgh's Innovation District, the Oakland Business Improvement District (OBID) Board of Directors is launching a comprehensive strategic planning process leading to the development of a bold visionary plan that will generate ongoing excitement and engagement and that will support the anticipated unprecedented growth and investment in the Oakland community of Pittsburgh, Pennsylvania. The OBID is seeking consultant services to facilitate the process which will include robust public relations/ communication components and organizing travel for up to three North American cities for the purpose of benchmarking. The process is expected to take 12 months starting in September, 2019. The anticipated budget for the process is \$100,000. The OBID will accept proposals submitted by individual vendors, as well as, proposals that include a team of vendors.

### B. About the Oakland Business Improvement District

Formed in 1999, the Oakland Business Improvement District (OBID) is Pittsburgh's second largest place management organization representing a diverse group of decision makers including property and business owners, international renowned universities and hospitals, as well as, government, community and cultural non-profits. Since 1970, property and business owners in cities throughout North America have realized that revitalizing and sustaining vibrant downtowns, city centers and neighborhood districts requires special attention beyond the services city administrations could provide alone. These private-sector owners came together to form nonprofit management associations which deliver key services and activities within the boundaries of their districts. These place management organizations are often called Business Improvement Districts (BIDs), Business Improvement Areas (BIAs), Partnerships and Alliances. Place management organizations are downtown champions that bring urban centers to life and ensure their sustainability.<sup>10</sup>

As one of only two Business Improvement Districts in Western Pennsylvania, we are primarily funded by a real estate property assessment collection. Our purpose is to develop and support Oakland based programs and services to maintain a vibrant, competitive and attractive business district. The OBID is managed by a Board of Directors made up of individuals representing the various stakeholders of Oakland including owners of small and large properties, business owners, representatives from the education and medical institutions, community and cultural organizations, the City of Pittsburgh and the Pittsburgh City Council. In 2010, the OBID Board of Directors developed the first organization Vision Statement to reflect the organization's growth as a community change agent: *To be recognized as a vibrant and dynamic business district that sets the national standard for other commercial districts' growth and innovation.* This proposal calls for the Board of Directors to develop the organization's first comprehensive strategic plan. We are, though, not new to visioning processes: in 2010, OBID developed Innovation Oakland (the region's first plan for a digital community) which laid the groundwork for our experience in forward thinking planning, implementation and large scale fundraising. The proposed strategic plan will also include the development of a funding strategy to guide the OBID's growth into an organization ready to service the demands of a global innovation center. This roadmap will follow an already successful start to a fundraising effort completed by the Board in 2017: the BID assessments are currently OBID's largest source of annual income (54%) and the Board successfully completed a stakeholder supported BID renewal process (1 year early) providing for a 63% increase in annual assessment income that began in 2018.

The OBID is committed to continue to invest in the greater Oakland community and shape this important economic center into a dynamic global community that is an attractive place for workers, businesses, residents and visitors. For more information about OBID including links to the organization's BID legislation, BID boundary map, By-Laws, and the most recent Audit and Annual Report, please visit: <https://onlyinoakland.org/obid/overview-2/>.

### **C. Community Context**

Touted as the region's economic engine, Oakland is Pennsylvania's 3rd largest area of economic activity and is home to the driving forces of the City of Pittsburgh's 21<sup>st</sup> century economy. Oakland captures Western Pennsylvania's largest concentration of universities and hospitals including the University of Pittsburgh, Carnegie Mellon University, Carlow University and the University of Pittsburgh Medical Center (UPMC) Hospitals. Attracting over 1.7 million visitors annually, Oakland is also a regional cultural center home to various arts and cultural venues, athletic stadiums, entertainment centers and parks, trails and recreation amenities including some of the most prominent cultural attractions in the City of Pittsburgh: Carnegie Museums of Art and National History, Phipps Conservatory and Botanical Gardens, Soldiers and Sailors Memorial Hall and Museum and the Carnegie Library of Pittsburgh.

Fueled by the growth of Oakland's education and medical sector, the City of Pittsburgh is building an Innovation District to be centered in Oakland as recommended by a ground breaking report prepared by the Brookings Institute and unveiled in September, 2017: *Capturing the next economy: Pittsburgh's rise as a global innovation city*. According to this report, using the strength of Oakland's universities and hospitals, the City is poised to create a new industry that rivals the might of Pittsburgh's former steel industry-attracting global private companies to Pittsburgh resulting in the creation of thousands of new jobs in the research and tech industry that will also support the growth of a thriving small business community.

With \$3.8 billion of new real estate projects underway in and around Oakland, a remaking of the business district skyline is underway particularly in the BID geographic area: since 2016 nearly 2 million s.f. of private development was completed with an additional 500,000 s.f. slated to break ground in 2019 alone. While the report identifies Oakland as the main driver of the Innovation District, it also challenges the neighborhood's leaders to invest in strategies that diversify the local economy and that improve the lifestyle infrastructure amenities critical to accelerating Pittsburgh's standing as a global innovation hub. Such awesome growth must also factor in human scale design and experiences.

### **D. Relevant Studies, Simultaneous Planning Efforts and Initiatives**

#### Pittsburgh:

- 1) The Brookings Report: "Capturing the next economy: Pittsburgh's rise as a global innovation city": <https://www.brookings.edu/research/capturing-the-next-economy-pittsburghs-rise-as-a-global-innovation-city/>
- 2) The Oakland Plan: The City of Pittsburgh and its partner agencies have begun working with the Oakland community to create a 10-year plan with a shared vision for Oakland's future and the projects and programs necessary to make that vision a reality: <https://pittsburghpa.gov/dcp/>

#### Oakland:

- 3) Envisioning the Future: University of Pittsburgh's Campus Masterplan and Institutional Masterplan (IMP): <https://www.campusplan.pitt.edu/imp>
- 4) Pittsburgh Innovation District: <https://www.pittsburgh-id.com/>
- 5) UPMC Heart and Transplant Hospital plans unveiled: <https://www.upmc.com/media/media-kit/hospital-building-projects>
- 6) Carnegie Mellon University update to Institutional Master Plan: <https://www.cmu.edu/cdfd/>
- 7) Innovation Oakland Smart Streets Plan Executive Summary developed by the OBID: <https://onlyinoakland.org/innovation-oakland/overview/>
- 8) Oakland Retail Market Study developed by OBID: <https://onlyinoakland.org/obid/programs/>
- 9) Oakland 2025 Master Plan developed by the Oakland Planning and Development Corporation: <https://www.opdc.org/oakland2025>

#### National/ International:

- 10) International Downtown Association maintains a wide array of resources on best practices, trends, and research at the forefront of the place management industry: <https://downtown.org/publications/>

## **E. Components of the OBID Strategic Plan Process**

The OBID Board of Directors will undertake a comprehensive strategic planning process focused on developing a vision for the OBID as a leader of community change, planning for organizational growth to support a broader role, increasing scope and scale of programs and services and serving a larger constituency of stakeholders. The objective is to assist the OBID to develop a comprehensive strategic plan that will prepare the OBID to best serve the rapidly changing environment of Oakland as it grows into a more dense and less student oriented district, to encourage the development needed of a business community centered in Pittsburgh's Innovation District and to position the OBID as an organization ready to service the demands of a global innovation center. The OBID's strategic plan will serve both as a roadmap for organizational growth and as a tool for assessing progress. The OBID will enter into a 12 month engagement with a Consultant to accomplish the following multi prong objectives:

- a) Develop a plan that, at minimum, addresses the following components:
  - a. Review of the organization Mission and Vision
  - b. Develop a Statement of Values
  - c. Develop an action plan of short and long term goals
  - d. Develop a funding strategy
  - e. Develop a Public Relations road map
  - f. Develop metrics for measuring the progress of the plan
  - g. Coach and assist the OBID Board and staff on the plan (during the 12 months)
- b) Public Outreach of the OBID Strategic Plan Progress: geared towards multiple audiences, share the plan progress, vision and goals as part of an on-going robust public communication and outreach campaign designed to expand the OBID's reach amongst a wider base of local and regional stakeholders and to cultivate future partners and BID members.
- c) Travel: organize 2-3 benchmarking trips (for up to 20 people per trip) designed to examine best practices from innovative North American cities that excel in business district management, place-making, public space curation and activation and successful strategies rethinking the 21st century brick and mortar marketplace. The consultant will assist to identify comparable cities. The OBID seeks to gather inspiration from successful projects, programs, retail, amenities and events that support companies and workers that Oakland's Innovation District seeks to attract. Funding for the travel has been secured.
- d) OBID Stakeholder Outreach in tandem with the City of Pittsburgh Oakland Plan: The City of Pittsburgh has recently launched a community wide process to create a 10-year plan with a shared vision for Oakland's future and the projects and programs necessary to make that vision a reality. The OBID is a key partner agency participating in this planning process. Given the unprecedented development underway in Oakland and the important impact this City plan will have on our constituents, the OBID seeks consultant assistance to engage the OBID Membership around the City of Pittsburgh's Oakland Plan process. Outreach to include, at minimum, traditional print and digital methods, website and BID member meetings.

## **F. Strategic Plan Participants**

OBID understands that collaboration and strategic partnerships will be essential to help OBID succeed and to meet the growth demands of Pittsburgh's Innovation District. OBID will, therefore, plan to involve key stakeholders and decision makers from organizations that are currently not represented on the Board of Directors to participate in the visioning and strategic planning process. We anticipate their full participation to include attending meetings and sessions organized by the Consultant, as well as, providing input and feedback. The Consultant will be critical in crafting messaging to the partners and assisting OBID in engaging the group throughout the process. The Consultant may also assist with identifying partners.

## II. General Instructions

### A. Proposal Submission

Please submit a single electronic PDF file submission to consist of the following sections:

- **Title Page:** Includes company name, address, phone number, e-mail address and primary contact person
- **Proposal Submission Requirements (8 page limit, including cover letter and budget)**
  - **Organizational Description:** Please provide a brief description of your organization/ individual expertise and experience as it relates to facilitating strategic planning, especially with Place Management/ Business Improvement District organizations, and with public relations campaigns.
  - **Organizational Values and Approach:** Describe or provide examples of your organizational values and approach and how these are reflected in your work.
  - **Strategic Planning and Services Description:** Describe the strategic planning process you would propose. Provide an outline of the process and specific approach, as well as, key milestones.
  - **Experience:** Describe similar successful projects previously undertaken by your company and individuals.
  - **Staff:** Please provide a description of proposed staff, availability, and descriptions of expertise specific to this Request for Proposal.
  - **Evaluation:** Describe your approach to evaluating the strategic plan and the effectiveness of the planning process.
  - **References:** Provide the name, phone number and e-mail address for references from 2-3 previous clients for similar projects.
  - **Budget:** Provide a budget to include proposed staff and hourly rates. The current budgeted amount for this RFP is **\$100,000**.

### B. Evaluation Criteria

The Criteria used in the evaluation of the proposals will include, but not be limited to, the following:

- Demonstrated capacity to successfully complete the project.
- Performance of the company on similar projects.
- Suitability of the Proposal - the proposal meets the needs and criteria set forth in the RFP.
- Innovative - demonstration of innovative approaches and work.
- Candidate Experience.
- Depth and Breadth of Staff.
- Demonstrated commitment to high service level agreements.
- Value/Pricing Structure and Price Levels.
- Review of references.

The Consultant shall disclose any professional engagements, relationships, conflicts of interest or potential conflicts of interest with developers of projects, their consultants, sub consultants and consultants that might impact the project.

### C. Due Dates and Notifications

<u>ACTION</u>	<u>DATE</u>
Proposals Due:	<b>5:00 p.m. EST, Monday July 29, 2019</b> <b><u>email to: <a href="mailto:georgia@oaklandbid.org">georgia@oaklandbid.org</a></u></b>
Notification to finalists:	<b>August 12, 2019</b>
Interviews:	<b>Week of August 19, 2019</b>
Contract Award/ Project Begins	<b>September 9, 2019</b>

**D. Questions**

Questions concerning this RFP should be directed to:

Georgia Petropoulos

Executive Director

Oakland Business Improvement District

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