



**REQUEST FOR PROPOSAL FOR A DISTRICT MANAGER FOR THE  
UPTOWN WHITTIER IMPROVEMENT ASSOCIATION (UWIA)  
October 2021**

The Uptown Whittier Improvement Association is seeking a qualified “District Manager” who will be the principal administrative and executive official of the Uptown Whittier Improvement Association. The District Manager is appointed by and serves at the discretion of the UWIA Board of Directors. Under policy direction of the UWIA Board of Directors will execute, lead, and coordinate the management and administrative policies and directives of the UWIA Board of Directors; to conduct administrative studies of District operations, procedures and department budget requests; prepares recommendations to the UWIA Board of Directors for ultimate policy decision; directs the preparation of a structurally balanced budget for all District funds; and performs related work as required. Individuals or companies are encouraged to apply. Proposals are due by August 25, 2021.

**Background:**

The Uptown Whittier Improvement Association (UWIA) is a public benefit corporation whose primary function is to administer the Uptown Whittier Community Benefit Improvement District (CBD). The UWIA has a contract with the City of Whittier to administer the revenues for this assessment district. The special benefit services funded by this CBD include maintaining cleanliness and order in the public rights of way, improving district identity, creating, updating, and running the website, facilitating district events, serving the corporations’ administrative needs, and advocating on behalf of the area’s property owners, business owners and residents. The Uptown Whittier CBD is a mandatory assessment district that funds special benefits or services over and above those currently provided by the City of Whittier. The CBD includes all property owners within the boundaries of the attached map. The function of the CBD is also one of an advocacy organization that seeks to improve the overall appearance, building/commercial mix, and public space improvements within the district.

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UPTOWN WHITTIER IMPROVEMENT ASSOCIATION

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info@uwia.org ■ www.uwia.org



**The expectations for the administrative employment and/or contract for services for this position include:**

**Required Skills and Experience:**

- Ability to plan, organize, direct, and coordinate the work of large, multifunctional organizations representing the entire spectrum of District governance operations and services.
- Working with public benefit, non-profit corporation Board of Directors, standing committees and taskforces
- General understanding of assessment district law and Proposition 218 special benefit requirements;
- Prior experience working with a district management corporation;
- Working independently and efficiently without direct supervision;
- Ability to establish and maintain effective working relationships with elected/appointed officials as well as with subordinates and representatives of other governmental units and civic groups and Board members from area associations, chambers, and non-profit organizations
- Ability to evaluate a continuous array of fiscal, budgetary, administrative and technical problems and recommendations for their solution;
- Ability to effectively communicate with stakeholders (property owners, business owners and residents);
- Ability to write and maintain records of the Association;
- Knowledge of basic accounting principles;
- Knowledge of basic property management;
- Knowledge of maintenance of the public rights of way;
- Proficient computer and business e-mail skills;
- Proficient understanding of the public records and public notice requirements of the
- Brown Act;
- Identify and pursue successful funding sources outside of the District assessments;
- Prior experience working with business owners in commercial districts



## **Expectations of the Selected Candidate or Company**

### **I. IMPLEMENTATION OF SERVICES:**

- Develop and maintain a highly visible role in the community, with an emphasis on key partnerships and relationship building to benefit the BID. These might include, but not limited to, new and existing businesses, individual sponsors/donors, corporate and other business support, private foundations, service clubs, etc.;
- Design, implement and maintain a Strategic Partnership Plan that includes key community partnerships, relationships with the media, sponsorships, publications and press releases designed to positively promote the BID within the community;
- Develop and maintain the district “brand” that will be uniform and used in collateral materials (printed and other forms), web site, signage and banners; Will manage the brand of the BID commercial area to continue the development of a vibrant, exciting destination for residents and visitors;
- Develop and maintain a highly visible role in the community, with an emphasis on key partnerships and relationship building to benefit the BID. These might include, but not limited to, new and existing businesses, individual sponsors/donors, corporate and other business support, private foundations, service clubs, etc.;
- Have a working knowledge and understanding of the Brown Act requirements;
- Assist in preparing and posting any RFPs as required;
- Design, implement, and maintain, in cooperation with the Board of Directors, a comprehensive plan for development/fundraising for the BID. This may include, but not limited to an annual campaign for special projects, financial appeals and financial gift solicitation;
- Develop, promote, and implement the BID business incentive programs and work to attract new businesses to the area;
- Research, organize, and coordinate special events designed to attract consumers to the shopping district, to improve community awareness and to promote business development. Candidate will be expected to raise funds for events;



- Oversee the administration of a well-managed database for sponsorships and donations for major projects within the BID including the standard and accurate maintenance of records, correspondences and project notes related to the major projects;
- Oversee all the necessary contracts or city services to maintain a safe and clean environment within the BID, including, but not limited to, sanitation, landscape maintenance, ambassadors, security or any MOUs entered into by the Board;
- Perform related duties as assigned by the Board.

## II. **CORPORATE ORGANIZATIONAL SUPPORT**

*UWIA Board meeting clerical, administrative and organizational support*

- Attend all UWIA Board and Organization Committee meetings;
- Prepare all UWIA Board packets, post consistent with the Brown Act and City of Whittier open meeting provision requirements;
- Distribute UWIA Board packets prior to the meetings;
- Prepare and distribute all committee and task force packets prior to the meetings;
- Work closely with President and Committee Chairs in the preparation of meetings and other assigned tasks;
- Attend all UWIA Board, Standing Committee and Task Force meetings;
- Help direct and manage UWIA Board discussions;
- Review and correct all minutes for accuracy;
- Maintain all corporate meeting records consistent with the Brown Act provisions;
- Oversee and monitor the annual election of UWIA Board members;
- Keep a roster of attendance for all UWIA Board members to ensure compliance with the bylaws attendance requirements;
- Prepare any and all reports, including the annual report to the UWIA Board and the City;
- Handle all mailings as required by the Management and Disbursement Agreement and bylaws.
- Obtain and maintain a broad understanding of all documents pertaining to the UWIA including but not limited to the Management and Disbursement Agreement, bylaws and vendor agreements;
- Schedule meeting venues or if available provide meeting space for Board and or committee meetings.



### III. GENERAL ADMINISTRATION

#### *Fiscal*

- Compile the annual UWIA budget from committee-developed budgets and present to the Treasurer for recommendation to the Board of Directors for approval;
- Provide bookkeeping services including recording of revenue, payments to vendors, preparing bank reconciliations, and basic accounting;
- Maintain accounting records through trial balance, and produces financial reports for the Board of Directors;
- Monitor actual expenses in comparison to budget and reports results and forecasts at monthly Board meetings;
- Reconcile revenues received to assessment amounts calculated by parcel and reports results to Board of Directors;
- Provide financial and related information to independent accountants that supports preparation of annual financial statements, regulatory tax filings, and an independent review;
- Prepare annual reports to City in compliance with Management and Disbursement Agreement;
- Support the Board's development of the annual budget and implements the budget as approved by the Board;
- Monitor Committee budgets to make sure they are in line with projections.

### III. GENERAL ADMINISTRATION

- *Supervisory*
  - a. Oversee maintenance and other service providers
  - b. Oversee and direct any student interns
- *Office*
  - Ensure public accessibility to records, minutes, and financial reports as required by the Brown Act.



**IV. OTHER:**

Other duties as assigned by the UWIA Executive Committee, Board and/or ~~Board~~ standing committees.

**V. Pay:**

The District offers a competitive compensation for the District Manager position which will be based on experienced, qualification, and performance. Compensation ranges from \$48K - \$60K annually.

**VI. DUE DATE:**

The Uptown Whittier Improvement Association reserves the right to accept, negotiate, reject, or propose amendment to any and all proposals submitted. The selection process will be determined based upon district management experience, knowledge of the law, experience in working with non-profit Boards and knowledge of the City of Whittier.

We reserve the right to reject all applicants as well as to determine that we will not fill this position.

For any questions regarding this RFP, please call 562 922.5961 and ask for Stephen Ortiz, Task Force Chair.

Please email your Resume, proposal, or response to [stephen\\_ortiz23@yahoo.com](mailto:stephen_ortiz23@yahoo.com)

**Due date:** Wednesday, August 25<sup>th</sup>, 2021

Please include three references, as well as three letters of recommendation related to similar work with your response to the RFP.

The Uptown Whittier Improvement Association is an Affirmative Action, Equal Opportunity employer and does not discriminate against employees or applicants because of race, religion, creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex gender, gender identity, gender expression, age, or sexual orientation, or any other characteristics protected by State and Federal law.