

City of Pleasanton, CA

Scope of Services

Economic Development Strategic Plan Update



Scope of Services

Project Understanding

The City of Pleasanton is seeking economic development consulting support to update the 2013 Economic Development Strategic Plan. To date, the City’s Economic Development Department staff managed such planning efforts with involvement of the City’s Economic Vitality Committee (EVC)—a 22-member committee with representation from the community’s key stakeholders and industry sectors—which advises the City Council on trends, issues, and government processes to identify opportunities to assist and promote economic vitality in the City.

Willdan understands that given the changing economic landscape of the past several years, exacerbated by the global COVID-19 pandemic, this update is an opportunity to reevaluate the 2013 strategic plan and develop a contemporary plan to meet the business needs of the city. The updated plan will also inform the City’s prioritization of public investments in catalytic projects that will serve to strengthen Pleasanton’s competitive positioning in the regional market:

**City of Pleasanton
Economic Development
Strategic Plan Objective:
To create and support
wealth generators that
contribute to the fiscal
health of the City
and the Community.**

- Sustainable residential and commercial development and identifies future opportunities to integrate well-designed, mixed-use development in areas near transit nodes;
- Attracting new investment and businesses to Pleasanton’s software, medical device, life sciences, and business services clusters at the Hacienda Business Park and other defined business centers; and
- Supporting/enhancing the City’s retail centers, such as the regional-serving Stoneridge Shopping Center, and the historic and vibrant downtown district.

To inform the updated economic development policies, programs and initiatives that will advance these business and redevelopment targets, Willdan will gather and review baseline information on the current state of Pleasanton’s business environment. Willdan will prepare a business needs assessment based on recently collected survey data to identify Pleasanton’s strengths and opportunities in the context of economic assets.

Willdan will also work side by side with city staff to develop discussion questions for use with identified focus groups and to gather community feedback. Together with findings from the City’s 2022 business needs survey and 2021 community survey, Willdan will synthesize this research and analysis in the City’s 2022-2023 strategic plan in collaboration with the City’s Economic Development Department staff.

Scope of Work

The following section provides a detailed discussion of the Willdan Team’s proposed plan and methodology to accomplish the Scope of Services identified within the City of Pleasanton’s RFP.

Task 1: Project Kick-Off & Management

Objective:	
To execute a Project Management Plan that will direct the Team’s communications and workflow throughout the engagement.	
Deliverables	
<ul style="list-style-type: none">▪ Final Project Scope▪ Project Kick-off Meeting & Project Management Plan▪ Schedule of Progress Calls, Deliverables, Meetings and Presentations	<ul style="list-style-type: none">▪ Information Request Memo▪ Existing Documents Review & Data Resources▪ Economic Development Strategic Plan Working Group

The Project Team will first coordinate with the City of Pleasanton Economic Development leadership and staff to adjust and confirm tasks, data, and deliverables for a Final Project Scope. Next, the Project Team will develop, schedule, and lead a Project Kick-Off Meeting with the Client Team to review, define and/or confirm aspects of a Project Management Plan (“PMP”). The PMP will direct the Project Team’s activities, schedules, check-ins (frequency TBD), resources and deliverables.

Willdan will work directly with the City’s Economic Development Manager, attending several meetings with the Economic Vitality Committee, as the background materials are reviewed and the plan is developed, and attending City Council meeting(s) at which the draft plan is presented for consideration.

Additionally, Willdan assist the City’s Economic Development Manager and other ED staff in preparation to facilitate engagement with key stakeholders and community partners across government, private and public sectors.

The Willdan Team will also actively integrate or leverage other regional planning efforts, including the use of other available federal funds, private sector resources, and state support which can advance the City of Pleasanton’s goals and objectives.

Willdan is available to plan/lead a project kickoff meeting with the EVC on Thursday, August 18, 2022, at 7:30 a.m.

Task 2: Economic Profile Analysis



Objective: To collect and analyze key data on existing demographic, socioeconomic, economic, and real estate conditions to identify current and potential economic engines and formulate a baseline for community input and ultimately the EDSP.

Deliverables

<ul style="list-style-type: none"> ▪ Economic Profile Report (Executive Summary) <ul style="list-style-type: none"> ○ Existing Demographic Analysis & Trends ○ Business Needs Gap Assessment 	<ul style="list-style-type: none"> ▪ Economic Assets Summary Report <ul style="list-style-type: none"> ○ Economic Assets SWOT Analysis ▪ Organizational Capability and Partnership Opportunities Summary
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The Economic Profile Report will include two critical topic areas, as outlined below. Throughout this research, the Project Team will compile key demographic and socioeconomic data, labor force characteristics, sales tax revenue, and other relevant data to ensure the most comprehensive and accurate information is utilized for this foundational component of the EDSP.

Existing Demographic Analysis & Trends: The Project Team, with data obtained from local sources including, but not limited to, California Department of Labor, California State Tax Commission, Alameda County, East Bay Economic Development Alliance, City of Pleasanton, and supported by Esri Business Analyst, will prepare a baseline demographic and economic profile that analyzes the City and its economic relationships to the region. The purpose of this analysis is to better understand the City’s economy within the context of the larger regional economy to identify unique opportunities for economic growth and diversification. The profile will evaluate aspects of the current economy and forecast trends for the short-term (5 years) for variables including, but not limited to:

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| <ul style="list-style-type: none"> ▪ Demographic and lifestyle characteristics (population segmentation by age, income and race) ▪ Key industries ▪ Number and types of businesses | <ul style="list-style-type: none"> ▪ Housing characteristics ▪ Labor force characteristics ▪ Employment and wage by sector; ▪ Taxable sales |
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Business Needs Gap Assessment: The Project Team will identify emerging or declining industry clusters with specific focus on the City of Pleasanton’s target sectors including software, medical device, life sciences, advanced manufacturing, and professional and business services clusters. The assessment will rely on recent business survey findings, further supported by data provided by Lightcast iO (formerly Emsi Labor Analytics). The assessment will profile local advantages or disadvantages; factors that directly affect economic performance including office/industrial product supply, legal/regulatory environment, workforce skills readiness; innovation assets; supply chains; and the local and regional education pathways ecosystem.

The Economic Assets Summary Report will summarize the SWOT analysis and provide a narrative tying diverse analytical metrics to the larger picture of Pleasanton as a desirable business destination. The two- to three- page report will be used by the City of Pleasanton for business recruitment and new commercial development.

Economic Assets SWOT Analysis: The Willdan Team will conduct a place-based Economic SWOT Analysis based on data collected in the Economic Profile Report to guide strategic priorities of the EDSP. Outcomes will be incorporated into the Performance Measures and Metrics in Task 6.

Organizational & Institutional Capacity Assessment: In cooperation with the City of Pleasanton Economic Development staff, the Willdan Team will engage regional and State partner organizations such as the Alameda Department of Economic & Civic Development to identify funding sources and organizational resources available for future opportunities. The assessment will also include a baseline profile of staffing and other organizational resources according to industry best practices established by the International Economic Development Council (IEDC) to inform the funding plan.

Task 3: Stakeholder Engagement

Objective:	To engage community partners and key stakeholders to build consensus around a shared vision and mission for the City of Pleasanton’s Economic Development Strategic Plan initiatives and future implementation.
Deliverables	
<ul style="list-style-type: none"> ▪ Internal Vision/Mission Workshop ▪ Stakeholder Input Documentation & Summary ▪ Business Climate Survey Results 	<ul style="list-style-type: none"> ▪ Draft EDSP Implementation Plan Framework ▪ Finalized Vision/Mission for Economic Development Strategic Plan

Building consensus around a clear vision will lead stakeholders to successful implementation of the EDSP. The Project Team will facilitate early and continuous engagement of stakeholders in an open, transparent, and inclusive process. We will develop a strategic public outreach framework that engages the community to help them fully understand the planning process. The outcome will be a clear vision for a successful and implementable strategic plan for the City of Pleasanton to move forward.

The Project Team is available to provide public engagement services through a variety of community engagement methods. Based on years of experience in more than 200 municipalities and formal certification through the International Economic Development Council, we recommend a multifaceted approach to community engagement that includes:

- Small focus groups/roundtables
- One-on-on interviews
- Developer/broker tour
- Business Surveys/polls (Willdan will rely on existing survey data)

The Project Team will generate all public outreach materials and required items, including agendas, meeting notes, minutes, presentation, other meeting materials across all types of engagement.

We will engage property owners/real estate developers, industry associations, and regional strategic partners. Public outreach topics will be tailored and expanded to suit each sector/group, but will generally cover these areas:

- Strengths and weakness
- Challenges and opportunities
- Workforce needs
- Business retention and expansion
- Attraction opportunity areas
- COVID-19 Impacts

Willdan maintains a software license with Slid.do (www.sli.do) to enable comprehensive digital outreach throughout the engagement. Furthermore, our team is highly experienced in planning and facilitating virtual interviews, workshops, and work sessions.

Task 4: Consensus Building Work Session (Draft EDSP)



Objective: To solicit input and collaborate with Economic Development staff on the draft vision, goals, objectives, and proposed policies/programs/initiatives as identified through the economic profile report, prior workshops and stakeholder outreach.

Deliverables:

▪ Internal Strategy Development Work Session	▪ Draft EDSP
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This EDSP will provide the foundation for the City’s Economic Development activities for the next five years. It will be rooted in existing Pleasanton initiatives, data and research conducted during this project, and comprehensive stakeholder outreach. Developing a plan that will provide unified direction and with support from a majority of stakeholders is the key objective of this task.

Accordingly, the draft economic development strategies will be presented at an internal Strategy Development Work Session with the Economic Development Staff to allow for discussion, review, and comment on the following primary focus areas:

1. Economic Diversification
2. Business Retention, Expansion and Attraction
3. Retail Revitalization
4. Entrepreneurship and Innovation
5. Workforce Development and Support
6. Community Partnership and Capacity Building

The Project Team will plan and facilitate the draft Strategy Development Work Session and will provide a prioritized list of up to ten Economic Development Strategic Plan strategies/tactics, fully supported by a recommended Implementation Action Plan for achieving the goals of each strategy. These strategies will be specific, measurable, attainable, relevant, and time-bound (SMART). The following questions, among others, will be discussed during the Work Session:

1. What is the Strategic Plan’s Vision Statement? Where do we want to be in the next 10 to 20 years?
2. What are the Strategic Plan’s key goals and strategies (ranked by priority for short-, mid-, and long-term implementation)?
3. What marketing practices and communications tools can be employed by City to achieve its economic development goals and objectives? What brand awareness programs can be implemented and what is the estimated cost over the next five years?
4. What are the expected outcomes of each strategy (qualitative and quantitative)?

5. Who is responsible for implementation of each strategy? Who are the City's key strategic partners required to successfully implement each strategy? What are these partners' roles, responsibilities, and financial/other commitments?
6. What are the ongoing monitoring and reporting benchmarks required to measure the successful implementation of each strategy? What is the source of the data for these benchmarks? Who is responsible for collecting and analyzing the EDSP benchmarking data throughout plan implementation?

The following details expand upon the potential programmatic elements to be incorporated in the draft EDSP and are based upon research, comprehensive stakeholder research and collaboration with the Client Team:

- **Economic Development Program & Policy Recommendations:** The draft EDSP will provide recommendations on refinements to existing economic development programs and policies to maximize public return on investment.
- **Workforce Development & Support:** The main purpose of this portion of the EDSP will be to identify the current and potential capacity to meet labor market demand while identifying any barriers to the attraction, development, and retention of workers. Recommendations will be cognizant of existing workforce development efforts and will draw upon innovative and successful initiatives in other areas across the country.
- **Community Partnership and Capacity Building:** The draft EDSP will summarize potential community partnerships and their strengths.
- **Business Retention, Expansion & Attraction Strategies:** The EDSP will include a framework and potential tools for retention/expansion of existing businesses and recruitment and attraction of new business, especially those in identified target industries. This framework will take into consideration related capabilities of partner organizations. Additionally, the recommendations will include guidance regarding a communications plan with all participating businesses regarding community-wide policies/programs that have been implemented to address overarching issues. The EDSP will also include a draft tracking tool to ensure program effectiveness.
- **Toolkit for Innovation & Entrepreneurship:** The recommendations will define the City's role in offering assistance to small businesses to support innovation and entrepreneurial small business growth and identification of infrastructure enhancements that can provide targeted business sectors with a competitive edge in the areas of business recruitment, retention and expansion.
 - Provide innovative alternatives for the retention and attraction of businesses and associated quality employment opportunities.
 - Recommend economic development financing tools such as tax credits, tax increment financing, planning/zoning regulatory relief, regional/state funding partners, corporate/institutional partnerships, and other tools to be determined through in-depth, primary research and engagement of the state/regional/local community.
 - Identify economic assistance tools that foster healthy investment, innovation, and development in all areas of the City.
 - Provide recommendations on how to best structure programs and efforts to address economic needs.
- **Land Use & Infrastructure Recommendations:** The plan will identify changes in land use and/or zoning that could facilitate achievement of the desired economic development objectives in relationship to the identified targeted industries and potential locations, especially with respect to:
 - Supportive land use regulations for development/redevelopment activity.
 - Strategies to reduce vacancies in the retail, industrial and tourism sectors.
 - Approaches to create a more viable and competitive business incubation environment.
 - Public investment in targeted infrastructure improvements to attract private investment.

- **Community Marketing/Brand Awareness Strategies:** The Project Team will advise the City and other designated stakeholders on ways to integrate the EDSP’s recommendations in the City’s ongoing marketing and branding initiatives to inform messaging and identify communications tools targeted on economic development.

Task 5: Implementation & Funding Plan Recommendations



Objective: To develop actionable and measurable implementation and funding plan recommendations that align with the economic development strategies.

Deliverables

<ul style="list-style-type: none"> ▪ Internal Implementation Action Plan Work Session (concurrent with Strategy Development Work Session) 	<ul style="list-style-type: none"> ▪ Implementation Matrix
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Following the feedback provided at the Strategy Work Session, Willdan will prepare the draft comprehensive economic development strategic plan culminating with research, analysis, input from officials, staff, business leaders, organizations and the regional community which will include Implementation Recommendations.

The Project Team will work collaboratively with Client Team to refine Implementation Recommendations as a critical component in short- and long-term economic development planning for Pleasanton. The plan will include an implementation matrix that defines goals, objectives, strategies, and performance metrics (Task 6) over the next five years.

The Implementation Action Plan will include:

- Action/Initiative description and desired outcome
- Sources and uses of funding (capital, operating, staffing, other)
- Institutional and organizational framework (organizational chart of primary agency responsible and key partners that can assist in carrying out the strategy)
- Identified connections to existing recommendations
- Target/estimated time frames/deadlines for completion by phase and year

The Project Team is well-equipped to produce visual documentation of strategy options as a critical component in supporting decision-making and developing a unified direction through community conversations. The plan will include an implementation matrix that defines short-term (one to three years), mid-term (three to five years) and long-term (five to ten years) goals, objectives, and strategies as well as performance metrics.

Task 6: City Council Work Session & Final Plan



Objective: To incorporate all deliverables and project components into a consolidated and visually appealing document and to present major components of the plan to Pleasanton City Council prior to finalization of the project.

Deliverables

<ul style="list-style-type: none"> ▪ Draft Final Report ▪ City Council Work Session 	<ul style="list-style-type: none"> ▪ Final Report
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Willdan will prepare and deliver to the City a substantive and comprehensive final report of the work performed under the proposed scope of work (“Final Report”). The Final Report will be organized according to the above tasks and will include each task-based deliverable according to the proposed scope of work.

The final Economic Development Strategic Plan will provide a clear, high level road map of concrete recommendations, along with clear accountabilities. It will be informed by rigorous analysis and engaging key stakeholders within the City and across the broader development and business community. We will present the project’s methodologies and findings during a final project capstone Work Session presentation with the City Council and other internal and/or public stakeholders to be identified in consultation with the City.

Fee Proposal

Provided below is Willdan’s proposed not-to-exceed fee for the scope of work described herein. **The proposed not-to-exceed fixed fee is \$49,220.** The fee quoted below includes all labor, travel, lodging, materials, printing for report deliverables (not for marketing collateral), overhead and profit, and any other agreed upon expenses associated with this engagement.

SCHEDULE OF FEES		Certified Economic Developer	Economic & GIS Analyst	Public Finance Advisor	Economist	Total Hours by Task	Total Cost by Task	% of Total
		M. McKay	C. Villarreal	J. Edison	A. Metts			
Hourly Billing Rates		\$ 195	\$ 185	\$ 240	\$ 195			
Task 1:	Project Kick Off & Management	16	12	4	12	44	\$ 8,640	18%
Task 2:	Economic Profile Report	16	40	2	24	82	\$ 15,680	32%
Task 3:	Stakeholder Engagement	16	0	2	4	22	\$ 4,380	9%
Task 4:	Consensus Building Workshop	16	0	8	4	28	\$ 5,820	12%
Task 5:	Implementation & Funding Plan	40	0	2	4	46	\$ 9,060	18%
Task 6:	City Council Work Session & Final Plan	16	0	4	8	28	\$ 5,640	11%
Total Labor Hours		120	52	22	56	250		100%
Budget by Personnel		\$23,400	\$9,620	\$5,280	\$10,920			100%
Percent of Professional Fees		48%	20%	11%	22%			
Total Fixed Price Fee							\$ 49,220	

Hourly Rates

Hourly rate schedules are included herein for any additional services requested or beyond the listed scope of work.

Willdan Financial Services Hourly Rate Schedule	
Position	Hourly Rate
Group Director	\$250
Managing Principal	\$240
Principal Consultant	\$210
Senior Project Director	\$185
Project Director	\$165
Senior Project Analyst	\$135
Senior Analyst	\$125
Analyst II	\$110
Analyst I	\$100

The Metts Group Hourly Rate Schedule	
Position	Hourly Rate
Workforce Development Expert	\$195

Reimbursable Expenses

Willdan's out-of-pocket expenses are typically included in fixed-price contract budgets. Extraordinary reimbursable expenses will be submitted for the City's authorization prior to billing. Requests for additional meetings, research, or other services outside of our proposed scope of work above are available on a time and materials basis according to our hourly rates.

Project Schedule

The following is a proposed project schedule/timeline, to illustrate how the Willdan Team will complete the proposed engagement. General project timeframes by task are summarized below. A specific project timeline will be developed following consultation with the City’s team at the project kickoff. The proposed timeline is tied to the initial kick-off meeting and will extend accordingly based on the contract execution date.

For each deliverable submitted, Willdan allows for a one-week client review cycle. The City’s comments should be compiled into a single electronic document and submitted to Willdan for editing. Willdan will submit a revised draft within one week, allowing the City team one final review cycle prior to Willdan issuing a final draft reflecting resolution of staff comments.

