

Request for Proposals

Strategic Action Plan Consulting Services for a Growing City and Economy

Issued: April 30, 2013



Brenda McKenzie, President & CEO

Request for Proposal - Baltimore Development Corporation Strategic Planning Consultant Services

The Baltimore Development Corporation (BDC) is seeking a Consultant to provide the services outlined in Key Areas of Focus below.

Background: The Baltimore Development Corporation (BDC) is initiating a process to create a strategic plan for economic development that will outline key steps for enhancing the economic and business climate in Baltimore. The timing is ideal, as it can be integrated with the development of the City's updated Comprehensive Economic Development Strategy (CEDS), to be completed this year. Furthermore, the strategic plan will advance the BDC's mission to increase economic growth, job creation and revitalization in the City. Ultimately, the strategic plan will serve as a guide for growing the City's economy and creating jobs – a key determiner in achieving Mayor Rawlings-Blake's goal of attracting 10,000 new families to Baltimore over the next decade.

Baltimore is home to many small and mid-sized companies which are significant drivers for local economic activity and job creation. Many of these businesses capitalize on the influence of major universities like Johns Hopkins and the University of Maryland, Baltimore, hospitals, national philanthropic foundations, as well as Baltimore's proximity to Washington, DC.

BDC is a recognized leader in economic development. Building on the City's notable tradition of vibrant economic revitalization will require the development of focused metrics that define and measure the successes of programs designed to grow Baltimore's overall economy. Consequently, a key component of this strategic plan will include proposing metrics to track the strategic initiatives and progress toward the overall goals.

Key Areas of Focus

This process should address three main areas:

- Assessment of existing economic conditions, obstacles, opportunities for expansion, and strengths in Baltimore City;
- Development of key priorities and options to move the City's economy forward;
- Development of metrics to track the success of new initiatives in terms of job growth, investment, and economic impact.

BDC intends to incorporate the information gleaned through this work in its CEDS plan; therefore, the final product must be consistent with CEDS requirements.

The following focus areas are suggested for investigation:

I. Quantitative Analysis of the Economic Development Landscape. The Consultant will develop a "fact base" that provides a holistic view of the economic development landscape in Baltimore City. In the past, Baltimore has struggled to identify City-centric data, as most analyses of economic activity are done on a regional scale. In order to judge our performance directly, a primary goal of this task is for the Consultant to develop and present data that are specific to Baltimore City. The Consultant will collect, analyze, report on, and provide clarification on a number of factors in order to present an accurate picture of the economy that also points toward strengths, opportunities, and challenges. The data will include but not be

limited to: demographic and psychographic trends; industry sectors and growth trends; employment trends and job growth; current and future workforce trends; income and socioeconomic trends; and population density and diversity trends.

II. Assessment of Assets & Opportunities. The Consultant will review existing economic studies, research Baltimore's community and business landscape, and conduct interviews with key stakeholders in the city in order to identify areas of opportunity. Specific focus should be placed on how to accelerate the pace of sustainable job creation and how to attract new residents through enhanced retail and commercial assets. This analysis will provide insight into successful businesses and thriving communities; industry clusters that are positioned for rapid growth; and opportunities to increase the diversity of businesses (including the mix of minority-owned, women-owned, and immigrant-owned businesses). The Consultant will provide recommendations for overcoming gaps and leveraging key assets, including: identifying the impacts from new policies on business and real estate development, funding and financing needs, and core training and skills development.

III. Identification of Innovative Economic Development Models. As part of the research process, the Consultant will examine various economic development models that are being used in the United States, Europe, and other global locations, to identify innovative initiatives that could serve as models appropriate for Baltimore. The Consultant will also consider innovative local models and initiatives, such as the Emerging Technology Center. Some of these benchmarks may include the development of cooperative businesses (entities owned and controlled by those who use the service or buy the goods provided by the business), evolving incubator models and shared workspace opportunities.

IV. Solutions for small businesses with a focus on enhancing the Small Business Resource Center (SBRC). Understanding that much of the economy's growth will occur through small business, integration of the SBRC with the City's small business support system is critical. The project will include an examination of the SBRC's mission, utilization and programming mix, funding level, and an assessment of its ability to serve the existing and future needs of the City's small business community. As appropriate, the Consultant will explore various scenarios, operating models and emerging best practices to develop an updated vision for the future of the SBRC.

V. Engagement with Stakeholders and Anchor Institutions. Baltimore is home to a number of anchor institutions, including hospitals, universities, and large corporations, which can promote the development of the local community through various strategies such as procurement opportunities with local businesses and direct investment in their peripheral communities. Successes in economic development can be furthered by the direct involvement of these entities, and the Consultant will work in conjunction with staff to develop creative programs for engagement with these stakeholders during this strategic planning process. In addition, the Consultant will act a resource, facilitating interaction among and between the anchors, key stakeholders, and the planning committee during this strategic planning process. It is critical that this area of investigation is integrated with the concurrent CEDS outreach efforts.

VI. Competitive Position. Given the BDC's focus on growing the economy, the Consultant will identify the City's best assets and strategic position within the region. The Consultant will provide insight into how the City is seen by its various constituencies, what makes it attractive to

the businesses and residents in the community, and how it can attract and retain these entities. Metrics to highlight the city's success relative to key measures should be included in the final product.

VII. Funding & Financing. The Consultant will conduct research to provide an overview of available funding options that could support Baltimore businesses and real estate development ventures. Sources of funds from both the public and private sectors should be included. The Consultant will: review and assess the availability of capital both locally and regionally; identify participating funding institutions and their levels of activity; create an inventory of local and regional sources of traditional (e.g., conventional debt and equity) and non-traditional (e.g., New Markets Tax Credits (NMTC), Community Development Financial Institutions (CDFI), Low Income Housing Tax Credit (LIHTC), Transportation Infrastructure Finance and Innovation Act (TIFIA), and Immigrant Investor Programs (EB-5)) financing; and investigate additional sources of capital that other cities or regions have successfully accessed and that could be duplicated in the Baltimore market.

Proposal Content

All proposals must contain, at minimum, the following information:

A. Relevant Experience: Include a brief description of the respondent's experience.

B. Cost Proposal: Include fee schedule.

C. Staffing: Identify a Project Manager.

D. References: Include a minimum of three (3) current references including name, company (if applicable), address, telephone number and contact person.

E. Contract Schedule: Task 1 must be complete within 6 weeks of award, and Task 5 must be complete by mid-September. All work must be completed within 2013 with the final end date to be negotiated at the time of award.

Schedule

Proposals are due to BDC no later than 12 Noon on Monday, June 10, 2013. BDC may interview respondents before making a final selection. It is anticipated that services will begin on or before June 28, 2013.

Pre-Proposal Conference

BDC will hold a pre-proposal conference on Wednesday, May 15 at noon. Respondents are encouraged to attend and should RSVP to Nancy Jordan Howard at 410-837-9305 by COB, Friday May 10.

Terms

All proposals shall be valid and irrevocable for a period of 120 days after the final date for submission of proposals.

Any or all bids may be rejected at the discretion of BDC.

Submission of Proposals

Proposals, whether mailed or hand delivered, must be received by the Baltimore Development Corporation no later than 12 Noon on Monday, June 10, 2013.

Respondents who submit their proposals by mail or delivery service should allow sufficient mailing and delivery time to ensure receipt by the issuing officer by the time and date.

One original, one paper copy, and one electronic copy (three copies total) of the proposal and all materials must be submitted. Faxed or emailed proposals will not be accepted.

Contract Terms and Conditions

A. Payment Terms: Invoices will be sent monthly for payments defined in the Contract. Payment will be processed upon receipt. BDC will make every effort to make payment in a timely manner, however should delays occur, no late charges will accrue. If the contractor does not receive a payment for any reason not deemed to be the fault of the contractor, the contractor should notify BDC as soon as possible to rectify.

B. Additional Services: Additional Services performed and/or materials delivered that are not specifically identified in the original contract, but requested and authorized by BDC will be deemed "additional service." A quote needs to be provided to BDC before any additional services are completed, and only after approval by BDC will additional services be permitted. Payment due will be under the same terms as the original contract.

C. Laws: The laws of the State of Maryland shall govern the Contract.

D. Liability: All respondents are independent contractors. BDC assumes no liability for the injury to the contractor's agents or employees, unless BDC, BDC's agents or employees cause such injury by gross negligence or intentional acts. The contractor will be

liable for any damage caused by negligence of the contractor, its agents or employees. Neither party shall be liable to the other for any incidental or consequential damages arising from the Contract.

E. Insurance: The selected contractor will furnish insurance certificates as a condition of the contract award naming the City of Baltimore and the Baltimore Development Corporation as additionally insured. The contractor must maintain the required coverage throughout the length of the contract. The coverage must contain a 30-day notice of cancellation.

F. Invoices: All invoices must be billed for the months in which the actual work was performed and include the date of service, service performed, contract amount, and total due.

Minority and Women's Business Enterprise Participation

Baltimore City has an interest in and policy of encouraging the equitable utilization of minority-owned businesses and women-owned businesses. The representative is strongly encouraged to make every good faith effort to equitably utilize the services of City certified minority business enterprises ("MBEs") and women's business enterprises ("WBEs"). For convenience, Representative is encouraged to use the MBE/WBE Directory available online at www.baltimorecity.gov/government/law/mwboo or in print form from the Minority and Women's Business Opportunity Office to identify available minority-owned and women-owned businesses.

Representative agrees to submit documentation on all minority business enterprises and women's business enterprises utilized on this project. The documentation will include, as to each subcontractor: (1) name; (2) total amount paid to subcontractor; and (3) owner's race/ethnicity and sex.

Rights Reserved and Administrative Information

A. Should it become necessary to revise any part of this RFP, provide additional information necessary to interpret provisions and requirements of the RFP, or respond to written inquiries concerning the RFP, BDC reserves the right to issue an Addendum to the RFP to all respondents who received the initial RFP.

B. BDC reserves the right to extend the Due Date by a reasonable time.

C. BDC reserves the right to accept or reject any and all proposals, at its sole discretion, received as part of this RFP, to waive minor irregularities, and to conduct discussions with all responsible respondents, in any manner necessary, to serve the best interest of BDC and the City of Baltimore.

D. BDC reserves the right to request additional information from any or all respondents, if necessary to clarify the contents of the proposals.

E. Issuing Office: The City of Baltimore Development Corporation (BDC) on behalf of the Mayor and City Council of Baltimore issues this RFP.

F. Public Opening of Proposals: Proposals will not be opened publicly.

G. Incurring Expenses: Neither the City of Baltimore nor BDC shall be responsible for any cost incurred by any respondent in preparing and submitting a proposal or requested supplemental information in response to this RFP.

H. Compliance with the law: By submitting an offer in response to this RFP, the respondent selected agrees that it will comply with all Federal, State, City laws, rules, regulations and ordinances applicable to its activities and obligations under the RFP and the Contract.

Proposals should be addressed to:

**Nancy Jordan-Howard, Chief Operating Officer
Baltimore Development Corporation
36 South Charles Street - 16th Floor, Baltimore, MD 21201**

This Request for Proposal does not constitute an offer, acceptance, or binding contract and is not intended as a final expression of any agreement of the parties. No contract, lease, written agreement, modification, or amendment shall exist or be binding on either party unless expressed in a formal written lease that has been executed and delivered by both Landlord and Tenant. The BDC reserves the right at any time to accept or decline any other proposals received.