



Request for Proposals (RFP) for DDA Consultant Services

Issued October 12, 2018

Population (2010 census)	2,454
Area	.55 square miles
No. of Households	731

SUMMARY

The Charter Township of Royal Oak Downtown Development Authority (DDA) requests proposals to provide professional planning services. Please submit ten (10) single sided original, complete and sealed proposals to:

Charter Township of Royal Oak
Downtown Development Authority
21131 Garden Lane, 2nd
Floor Ferndale, MI, 48220
Attn: Jerry Saddler, DDA Board Chairman

Notwithstanding any other provisions of the RFP, the DDA reserves the right to reject any or all proposals, to waive any irregularity in a proposal, and to accept or reject any item or a combination of items, when to do so would be to the advantage of the DDA and its taxpayers. It is further within the right of the DDA to reject proposals that do not contain all elements and information requested in this document. The DDA shall not be liable for any losses incurred by any responders throughout this process.

CRITICAL DATES

Identified below are the critical dates associated with this Request for Proposals. Further details and requirements are contained in the specific sections or attachments included in this package.

Request for Proposals Issued: Friday, October 12, 2018

Questions Due: Friday, October 26, 2018

Proposal Due Date: Monday, November 5, 2018, 1 p.m.

Interviews of final candidates: Will take place the week of November 5, 2018

Interested parties are encouraged to submit questions regarding this Request for Proposal via email to Jerry Saddler at buster76@sbcglobal.net. Responses to questions will be provided only by email.

GENERAL INFORMATION

The Charter Township of Royal Oak, MI is located in Oakland County, Michigan, north of Eight Mile Road, between the communities of Ferndale and Oak Park. The Charter Township is comprised of approximately 0.55 square miles, with a 2010 census population of 2,454. The land uses within this community consists of mostly residential lots developed beginning in the 1950s to current times. The Township's children attend schools of the Ferndale and Oak Park School Districts. There is some commercial/industrial development, with potential for future in-fill development of vacant Township or DDA owned property.

The DDA encompasses 49 parcels totaling approximately 73 acres of the 350-acre township. With a recent annual budget of roughly \$60,000, the DDA is responsible for the continuous economic viability of the existing business along Eight Mile Road, a major arterial corridor in the Metropolitan Detroit area. The DDA is also responsible for the redevelopment of sites into commercial or mixed uses which will provide goods and services to Township residents and the adjacent community. The DDA has worked to bring retailers into the district that will provide residents with the items necessary for a healthy and prosperous life and add to the overall appeal of establishing a life within the community. The intent of the DDA is to promote economic redevelopment that results in the creation of new businesses. Business that will provide a range of services to meet the needs of Township families.

SCOPE OF SERVICES

The Charter Township of Royal Oak Downtown Development Authority wishes to contract with an outside consulting firm or individual to provide planning services, referenced herein after as "DDA Planner". The DDA Planner shall perform such duties as may be set forth within the DDA's Master Plan, provide both short-term and long-term economic development recommendations, marketing and promotion of sites within the DDA district or any additional planning matters as directed by the DDA Board.

Primary Professional Services

The consulting firm must be capable of providing the technical and planning advisory services listed below. Applicants shall submit options for billing services utilizing a fee schedule of hourly rates and a retainer option.

- A. Attend meetings of DDA at mutually convenient times. Currently meetings are scheduled monthly but may switch to a less frequent schedule based on consultant advisement.
- B. Advise DDA on planning, zoning, development and urban design issues.
- C. Prepare materials for public information and promotion, including site schematics and GIS maps.
- D. Provide design assistance regarding public improvement projects, including design guidelines, landscape requirements, signage, and architectural standards.
- E. Provide assistance to implement elements of the Royal Oak Charter Township DDA Plan.
- F. Provide liaison with Michigan Department of Transportation, Michigan Department of Commerce, Oakland County Economic Development, Oakland County Road Commission, Royal Oak Township Board, Planning Commission, Board of Zoning Appeals, property owners, businesses and residents regarding ODA activities.
- G. Prepare cost estimates of specific implementation functions and elements of plan.
- H. Coordinate and assist DDA with its administrative functions which are required under Act 197, P.A. of 1975, as amended.
- I. Conduct discussions and negotiations with potential developers, investors and prospects for attraction to or retention in the Township.
- J. Community and Economic Development Services. The Consultant will provide professional services for the economic development of businesses within the DDA district benefiting the overall community. These services shall include:

1. Help identify newsworthy stories of business success, new businesses and other factors influencing the business climate within the Royal Oak Township DDA.
2. Inform businesses of important events, resources, and business practices – hours of operations, merchandizing that will improve sales, etc.
3. Keep Township officials up-to-date on ongoing projects and opportunities.
4. Provide assistance to the DDA as appropriate. Assistance may include:
 - Communication with Township Administration, Township Board and DDA Board Members;
 - Recommendations to Township Administration, Township Board and DDA Board Members;
 - Researching, obtaining and delivering information regarding Township, County, Regional and State programs that assist local business and maximize their economic opportunities; and
 - Coordinate and interact with Township Administration and the DDA to help identify potential projects for the DDA Plan.

Potential Additional Professional Services

In addition to the Primary Professional Services identified above, a viable consultant should have experience with and be capable of providing additional professional services identified below should the DDA Board request such services. Such services would be provided as an addendum to the contract for Primary Professional Services and costs negotiated at the time of assignment.

Other professional services as may be requested by the DDA may include the following.

1. Prepare and update the DDA's Tax Increment Financing Plan & Development Plan when needed. The above services are specified and described in Act. No. 197 of 1975, as amended.
2. Monthly Electronic Bulletin. Successful shopping centers maintain constant communication with their tenants. This concept is much more important and more challenging in a downtown environment with no central management entity. The Consultant will develop a method for maintaining a high level of information sharing with the businesses and administration of Royal Oak Township. The primary method will be an electronic bulletin that is updated on a monthly basis. The monthly electronic bulletin may include some of the following:
 - Featured businesses,
 - Featured events,
 - Marketing and merchandising tips for merchants,
 - Availability of financial and technical resources,
 - Status updates on development activity, and
 - Status updates on on-going projects such as the DDA Plan Update.
3. Stakeholder Focus Group Meetings
 - a) The Consultant will develop a schedule, agenda and list of persons to be invited to the focus group sessions. All logistical matters will be addressed at this time.
 - b) The Consultant will lead a fast-paced analysis of the strengths, weaknesses, opportunities and threats to the DDA from the point of view of the stakeholders present. Each session will begin with a brief orientation and summary of work to date, including the DDA planning and development activities. A series of key discussion questions will be utilized to elicit input from the session participants. Participants will be broken into smaller discussion groups based on areas of development or business interest.

c) The Consultant will prepare a report that summarizes the input received at each session. This report will serve to document the major stakeholder concerns and issues.

d) The Consultant will meet with Township Administration and DDA representatives to discuss the input received from the focus groups and interpret the issues raised at these sessions into findings to be included in the annual marketing plan and the monthly electronic bulletin.

4. Shopper Surveys and Stakeholder Interviews. Determining shopper's preferences is essential for maintaining a competitive mix of uses and products. The best way to identify consumer preferences is by asking people what they want.

a) The Consultant will conduct 50-100 intercept surveys of shoppers in the DDA. Interviews will be conducted with patrons of downtown retailers and will be comprised of resident and worker shoppers. Each interview will be approximately ten minutes in length. Shoppers will be asked questions regarding:

1. Current shopping habits both within the DDA and the surrounding communities.
2. Evaluations of the current retail and restaurant mix in the DDA.
3. Patronage of stores and restaurants in the DDA.
4. Recommendations for new retailers and restaurants in the DDA.
5. Expected patronage of proposed new retailers to the DDA.
6. Concerns and comments regarding access, ease of shopping, parking, hours of operation, etc.
7. Origin and destination of shoppers to measure cross-shopping at other shopping areas, and their local street address to define a trade area for each segment.
8. Demographic characteristics.
9. Recommendations for special activities in the DDA.

b) The Consultant will conduct 25-50 phone surveys of individuals within the defined residential trade area. The phone survey will be more detailed and focus on shopping habits and likes and dislikes of retailers in the DDA as compared to retailers in the surrounding community. The telephone survey will also test the feasibility and potential patronage of any proposed changes/additions to the tenant mix of the downtown area and any other issues that may surface during stakeholder meetings and discussion with Township Administration, DDA, and the project committee.

5. Annual Strategic Plan. The Consultant will work with Township administration, DDA Board, Chamber of Commerce, and other organizations to develop an annual strategic plan. Activities may include:

- a) Develop a strategic plan (based on the information and ideas that come from the stakeholder meetings and surveys) with specific tasks to be achieved over the course of the next year.
- b) Identify responsible parties for each task.
- c) Identify sources of funding for each task.
- d) Establish a reporting mechanism to ensure tasks are being completed as identified in the plan and a mechanism for updating the plan on an annual basis.

Elements of the plan may include:

- Positioning – your place in the market landscape,
- Competitive Differentiation – the characteristic that makes you memorable,
- Voice – the use of language that positions you in the realm of a larger reality,
- Story – the use of your history to illuminate a new vision of the future,
- Audience – the use of vocabulary that appeals to specific groups,
- Tactics – the specific marketing methods that will deliver your message, and
- Execution and Controls – documenting expectations, monitoring costs, meeting deadlines

6. Identify Additional Funding Source. Provide the DDA Board with updates on other additional funding sources for development projects within the district. An example of such sources may include sources for grants, corporate sponsorship opportunities, State funding through economic development tools.

CONTENT OF PROPOSAL

Proposals shall contain the following information:

1. Cover letter and introduction including the name of the firm or individual and the name and telephone numbers of the person(s) authorized to represent the company regarding all matters related to the proposal;
2. Prospective providers should indicate how they envision being able to provide services to the Charter Township of Royal Oak DDA, and how those services will fit within the goals and policies of the DDA.
3. Up to five (5) summaries of experience working with other communities with similar geographic profiles and demographics.
4. Representative list of current clients with references and contacts for at least three (3) clients;
5. Resumes of key personnel to be performing the planning functions for the DDA, including education and professional certifications;
6. Samples of reports to be submitted to the DDA which may address one or more of the following topics:
 - a. corrections (“comments”) to an initial submittal of a plat or site plan
 - b. a concept review for a project proposed in the DDA
 - c. monthly inquiries from the public, developers, etc. regarding potential development.
7. A fee schedule identifying specific rates for services and meeting attendance including sample invoice detail, billing schedule and mileage charges;
8. Provide any additional information that you feel is pertinent in the DDA’s decision on selecting a planning consultant.

OFFER EXPIRATION DATE

Proposals in response to this RFP will be valid for sixty (60) days from the proposal due date. The DDA reserves the right to ask for an extension of time if needed.

OWNERSHIP OF MATERIALS

All materials submitted in response to the RFP become the property of the Charter Township of Royal Oak DDA and supporting materials will not be returned. The Charter Township of Royal Oak DDA is not responsible for any costs incurred by the company in the preparation of the proposal or for presentation or related meeting time.

SERVICE AGREEMENT AND INSURANCE

The successful service provider will be asked to enter into a service agreement and to provide a certificate of insurance showing coverage for liability, workers compensation, and automobile. The service agreement will contain a provision specifying a deadline for submitting invoices. Any invoices submitted for services not billed in accordance with the deadline may, at the sole discretion of the Charter Township, be considered invalid and payment may be refused. Any future relationship between the Contractor and the Charter Township DDA will be an “at will” relationship and may be terminated by either party, for any reason, following a 30-day notice.

INDEPENDENT CONTRACTOR STATUS

The DDA Planner will not be an employee of the Charter Township DDA and must meet the IRS requirements for designation as an independent contractor or firm.

CONFLICT OF INTEREST

The Charter Township of Royal Oak requires that service providers disclose conflicts of interest when they may occur. The Charter Township, at its discretion, may arrange for alternative third-party support in such cases. In general, the Charter Township will not allow a service provider to review applications from a client of the service provider. Past or pending client relationships may or may not be determined to be conflicts but should always be disclosed and discussed with the DDA.

MISCELLANEOUS

1. This RFP does not, under any circumstances, commit and/or bind the Charter Township of Royal Oak to any cost incurred by any Provider prior to the execution of a final agreement with the Township.
2. The Township reserves the right to reject any and all proposals received as a result of this request and to negotiate separately with competing Providers.
3. Provider may submit questions prior to submitting a proposal. Questions must be submitted by email to Jerry Saddler at buster76@sbcglobal.net. Responses to questions received will go to all bidders.
4. Proposals must arrive by mail at the Charter Township of Royal Oak DDA, Municipal Building at 21131 Garden Lane Road, Ferndale, MI 48220.
5. Proposals should be prepared simply and economically, providing a straightforward, concise description of the Provider's ability to meet the requirements of this RFP. However, if the Partner can provide the Township with a mutually agreeable cost-effective approach not presented in this RFQ, please note the Township is willing to consider ALL economical options.
6. Provider may be asked to make an oral presentation to the Charter Township of Royal Oak.
7. Provider shall provide the number of years the Provider has been in existence and operating.
8. Provider shall identify the point person for the Township to contact in relation to this request.

Thank you for your attention to the foregoing and for your anticipated response.

Submitted by:

Jerry Saddler
DDA Chairman