

# ATTACHMENT B: SCOPE OF WORK & BUDGET

## 1. Project Startup and Management

Upon contract execution, Strategic Economics will work with City staff to kick off the project and analysis. Prior to a kickoff meeting, the Strategic Economics team will review existing materials as described in the RFQ and responses to RFQ questions. Strategic Economics will also request relevant data from the City, including GIS shape files, financial data, development projects, etc.

Strategic Economics and Winter Consulting will attend a project initiation meeting with City staff to review the scope of work and the schedule of deliverables and meetings with stakeholders and decision-makers. During the kick-off meeting, the Strategic Economics team will also begin to identify stakeholders, discuss the engagement strategy, and discuss project roles and responsibilities. The kickoff meeting will be an opportunity to make refinements to the scope and schedule, if needed. After the meeting, Strategic Economics staff will tour San Leandro with City staff.

A Strategic Economics staff member will prepare for and attend a Finance Committee meeting to introduce the project team and approach/scope/timeline.

Strategic Economics and, as needed, Winter Consulting, will hold bi-weekly virtual meetings with City staff to discuss progress, project needs, and interim findings and recommendations.

*Deliverable: Kickoff and check-in meeting agendas and notes.*

*Deliverable: Finance Committee PowerPoint slides.*

## 2. Data Analyses of Economic Conditions and Opportunities

Strategic Economics will selectively analyze employment, industry, and business trends over the past three to five years by examining local and regional East Bay trends and projections using California Employment Development Data, EMSI data provided by the City of San Leandro via the East Bay EDA, City business license data, and/or Plan Bay Area and/or Woods & Poole regional employment projections. Strategic Economics will also evaluate start-ups and entrepreneurial activity in the city based on data provided by the City and/or East Bay EDA.

These analyses will identify San Leandro's strengths beyond the two-digit NAICS code level to gain a more fine-grained understanding of the types of businesses that drive the regional economy (e.g., computer software and hardware), those that support the regional economy (e.g., professional and business services), and those that serve local residents (e.g., convenience retail and restaurants). The task will also provide insights into San Leandro's specific strengths and weaknesses relative to the East Bay region, and identify emerging subsectors in the city.

Strategic Economics will connect these industry projections with local workforce conditions and demographics by analyzing demographic and household characteristics of the San Leandro population and workforce compared to the Southern Alameda County area and the East Bay as a whole. Strategic Economics will also use U.S. Census LEHD data to examine commute patterns of residents and workers in San Leandro. Strategic Economics will conduct original data analysis only as necessary, while otherwise reviewing existing data findings already held by the City of San Leandro.

Strategic Economics will profile and provide analysis of major commercial and industrial subareas within San Leandro. Depending on data availability, the analysis will examine characteristics such as:

- Existing commercial uses, development activity (based on data provided by the City), market trends, and market potential for new development and redevelopment.
- Analysis of subarea industry mix and specialization, including relationships between businesses within the area and to major industry subsectors that are heavily concentrated in San Leandro.
- Location and amenities, including access/connections to transportation networks and Lit San Leandro access.
- Opportunities to grow jobs and retain businesses.
- Sales tax performance at the citywide and subarea levels.

The results of these sub-area analyses will then be used to identify the economic development opportunities represented at each area, identification of major development opportunity sites, and consideration of how the areas should be prioritized for development of place-specific strategies in the Economic Development Strategy.

*Deliverable: As-needed slides for sharing interim findings during bi-weekly check-ins with City staff.*

### **3. Key Informant Interviews and Focus Groups**

Strategic Economics will facilitate a series of up to six in-person or virtual stakeholder group meetings. The stakeholders will be defined in close coordination with City staff, but could potentially include: key business representatives representing retail/restaurants, advanced manufacturing, other high tech industries; brokers, developers, community leaders, property owners, and City staff. Winter Consulting will draw from their expertise to advise Strategic Economics and City staff regarding identification and inclusion of stakeholder group participants. In addition to gathering qualitative information, the stakeholder groups will help to build support for the Economic Development Strategy and achieve “buy-in” from community leaders. Strategic Economics will facilitate each of the meetings, formulating specific topics and questions with the goal of gathering required information and generating ideas for potential strategies. It is assumed that City staff will contact all stakeholders to schedule and coordinate the focus group meetings.

Strategic Economics will also conduct up to five interviews with business community leaders representing different business types or industry sectors in San Leandro. Interviewees would be identified through collaborations with organizations such as the San Leandro Chamber of Commerce and other organizations that have deep knowledge about the business landscape in San Leandro as well as the challenges businesses are facing. Winter Consulting will provide input regarding targeting and outreach methods for identifying and inviting participants in this process, and may participate in a focus group or business leader meeting if specialized translation or other engagement expertise is required.

*Deliverable: Focus Group Meeting Notes*

### **4. Community Workshop: Vision, Goals, and Priorities**

The first of two general community workshops will focus on general community priorities, vision, and areas of interest. The content will cover an introduction to the project, explanation of economic

development, an overview of data, and exercises to elicit community feedback. The workshop will be designed and facilitated by the Strategic Economics team, with City staff publicizing the event (with guidance and limited support on outreach provided by Winter Consulting), arranging a venue, arranging venue setup needs, and potentially helping to facilitate small group exercises. Winter Consulting will design the workshop agenda and activities, coordinate preparation, provide event activity materials (such as printing posters, providing markers, sign-in sheets, etc., if applicable), facilitate the event activities, support with setup and takedown, and provide summary notes for the event. Strategic Economics will prepare content for presentations and exercises as needed and lead event presentations and activities as appropriate. The community workshop can be conducted as either an in-person event or virtual event.

*Deliverable: Workshop agenda, workshop exercise materials, PowerPoint slides, and summary notes.*

## **5. SWOT Findings and Conclusions Summary**

Based on the findings of the analyses and the qualitative input received through stakeholder engagement activities, Strategic Economics will develop a summary of strengths, weaknesses, opportunities, and threats (“SWOT”) for attracting, retaining, and growing different categories of businesses in San Leandro, including consideration of development opportunity sites, reinvestment in the existing building stock, and subarea-specific conclusions. The SWOT will include references to data findings as necessary to explain the findings, but the full write-up of the technical analyses will ultimately be provided as part of the Economic Development Strategy itself.

*Deliverable: SWOT Findings and Conclusions Summary Memo (Admin and Final Drafts)*

## **6. Preliminary Recommendations and Document Framework Drafts**

Based on the SWOT findings and the emerging vision, goals and priorities identified through stakeholder outreach, Strategic Economics will prepare a draft document framework for the Economic Development Strategy that describes recommended strategies and examples of implementation actions, including consideration of findings prepared as part of the City’s separate creative economy / arts and culture analysis. The framework is intended as a means of efficiently vetting and refining recommendations for the Economic Development Strategy prior to authoring the comprehensive document. The framework will be used to receive and incorporate guidance from City staff.

*Deliverable: Document Framework (up to two informal drafts for vetting initial strategy concepts)*

## **7. Economic Development Strategy**

Based on feedback on the document framework from City staff, Strategic Economics will prepare a Preliminary Administrative Draft of the Economic Development Strategy with an implementation work plan matrix that describes five-year implementation initiatives. The Strategy will describe relevant economic context and findings, the SWOT conclusions, and future changes necessary to support retaining and expanding San Leandro’s existing and emerging major industry subsectors. The Strategy will also incorporate subarea-focused strategies related to places with significant economic and business activity in San Leandro.

The implementation work plan matrix will identify specific prioritized actions for the next five years and beyond, with schedule/phasing and identification of responsible leading and supporting parties. The matrix will include strategies and actions for both the City as a whole and for subareas of the city, as appropriate.

Upon staff review and feedback on the Preliminary Administrative Draft, Strategic Economics will revise the draft, refine the implementation action matrix, and work with City staff to develop estimates of staff time requirements and any items likely requiring more funding than currently available. Strategic Economics will also research and note examples of potential outside funding sources for implementation. These revisions will be delivered as part of an Administrative Draft, to be followed by further staff review and subsequent delivery by Strategic Economics of a Public Draft. The strategy will then be finalized in response to City Council and other final feedback.

*Deliverable: Economic Development Strategy with Implementation Matrix (Preliminary Admin Draft, Admin Draft, Public Draft, Final Draft)*

## **8. Stakeholder and Decisionmaker Engagement: Strategy Feedback and Approvals**

Stakeholder and decisionmaker engagement activities in the latter half of the project will include a community workshop and two meetings of the City Council. The community workshop is targeted to occur during the finalization of the revised vision and development of the initial strategy recommendations. The workshop will be used to gather feedback on both items. Responsibilities of City staff, Winter Consulting, and Strategic Economics for the community workshop will be the same as those specified for the first workshop.

The first City Council “public workshop” will be used to present the Public Draft Economic Development Strategy document and obtain feedback. The second City Council meeting will be used to seek approval for the Economic Development Strategy.

*Deliverable: Workshop agenda, workshop exercise materials, PowerPoint slides, and summary notes.*

*Deliverable: City Council meeting PowerPoint slides.*

# BUDGET

The budget laid out in Figures 1, 2 and 3 below represents Strategic Economics’ budget to complete the San Leandro Economic Development Strategy. As shown, the total proposed budget is \$120,000, with a contingency budget of \$30,000 to cover any additional scope additions/amendments that may be requested by the City of San Leandro during the project. The total project budget plus contingency and additional allowance is **\$150,000**.

**FIGURE 1: TOTAL BUDGET BY TASK FOR THE SAN LEANDRO ECONOMIC DEVELOPMENT STRATEGY PROJECT**

Task #	Description	Total Time	Total Amount
		Hours	Dollars
<b>Task 1</b>	<b>Project Startup and Management</b>		
1.1	Request and Review of Existing Data and Materials	8	\$1,173
1.2	Kickoff Meeting and Site Visit	16	\$2,756
1.3	Finance Committee Meeting	4	\$940
1.4	Project Management, Bi-Weekly Meetings	36	\$6,422
<b>Sub Total - Task 1</b>		<b>64</b>	<b>\$11,291</b>
<b>Task 2</b>	<b>Data Analyses of Economic Conditions and Opportunities</b>		
2.1	Employment, Industry, and Business Trends	73	\$10,801
2.2	Workforce and Demographics	24	\$3,280
2.3	Subareas, Retail	119	\$17,290
<b>Sub Total - Task 2</b>		<b>216</b>	<b>\$31,371</b>
<b>Task 3</b>	<b>Key Informant Interviews and Focus Groups</b>		
3.1	Business Leader Interviews (5)	13	\$1,766
3.2	Focus Groups (6)	22	\$3,741
<b>Sub Total - Task 3</b>		<b>34</b>	<b>\$5,507</b>
<b>Task 4</b>	<b>Community Workshop: Vision, Goals, and Priorities</b>		
4.1	Community Workshop 1	123	\$14,429
4.2	Planning and Reporting	9	\$1,198
<b>Sub Total - Task 4</b>		<b>131</b>	<b>\$15,627</b>
<b>Task 5</b>	<b>SWOT Findings and Conclusions Summary</b>		
5.1	SWOT Summary Drafts (2)	35	\$5,610
<b>Sub Total - Task 5</b>		<b>35</b>	<b>\$5,610</b>
<b>Task 6</b>	<b>Preliminary Recommendations and Framework Drafts</b>		
6.1	Document Framework Drafts (2)	43	\$7,120
<b>Sub Total - Task 6</b>		<b>43</b>	<b>\$7,120</b>
<b>Task 7</b>	<b>Economic Development Strategy</b>		
7.1	Preliminary Admin Draft	77	\$12,000
7.2	Resource and Funding Research	18	\$2,870
7.3	Admin Draft	11	\$1,785
7.4	Public Draft	8	\$1,335
7.5	Final Draft	8	\$1,335
<b>Sub Total - Task 7</b>		<b>122</b>	<b>\$19,325</b>
<b>Task 8</b>	<b>Stakeholder &amp; Decisionmaker Engagement</b>		
8.1	Community Workshop 2	123	\$14,429
8.2	Planning and Reporting	15	\$1,708
8.3	City Council Meetings (2)	26	\$4,750
<b>Sub Total - Task 8</b>		<b>163</b>	<b>\$20,887</b>
<b>Sub Total - Labor</b>		<b>808</b>	<b>\$116,738</b>
<b>Other Direct Costs</b>			
	Travel Expenses		\$662
	Data		\$500
	Workshop Materials		\$1,100
	Deliverables Printing and Other Miscellaneous		\$1,000
<b>Sub Total - Other Direct Costs</b>			<b>\$3,262</b>
<b>GRAND TOTAL</b>		<b>808</b>	<b>\$120,000</b>
<b>PROJECT CONTINGENCY BUDGET</b>			<b>\$30,000</b>
<b>GRAND TOTAL + CONTINGENCY</b>			<b>\$150,000</b>

