



Saginaw 2020 Work Plan

January 7, 2019 to September 30, 2020

Alora M. Wachholz, CEcD
Chief Executive Officer
Local Economics, LLC

In an effort to grow a healthy local economic climate and continue some of the existing successful business programs and projects that are already underway in the community, the City of Saginaw and Local Economics, LLC mutually agree to the following **23-Point Action Item** scope of work, and associated costs listed herein, in addition to the services of the Consultant, agreed at **\$45,000.00** for the duration of the contract, to be undertaken during the time period from **January 7, 2020 until September 30, 2020** as part of the Consultant Work Plan service objectives:



Action Items

- ACTION ITEM #1:** On-call support by Consultant during work week business hours¹
- ACTION ITEM #2:** General administration of existing Chapter 380 Agreements and Tax Abatement Agreements²
- ACTION ITEM #3:** Creation of a Marketing Plan for Building Improvement Grant (BIG) Program and schedule³
- ACTION ITEM #4:** Administration of Building Improvement Grant (BIG) Program applications and incentives⁴
- ACTION ITEM #5:** Continued work with major mixed-use development groups as-needed⁵
- ACTION ITEM #6:** Represent City on boards and at meaningful regional events⁶
- ACTION ITEM #7:** Keep all marketing information up-to-date online and in electronic format⁷
- ACTION ITEM #8:** Conduct 5 recruitment meetings per month on behalf of the City for viable, quality opportunities and provide Recruitment Feedback Sheets⁸
- ACTION ITEM #9:** Conduct 5 retention meetings per month with local business owners / commercial property owners / brokers and provide Retention Feedback Sheets⁹
- ACTION ITEM #10:** Host monthly Business Basics classes for free at the John Ed Keeter Public Library¹⁰
- ACTION ITEM #11:** Produce monthly E-newsletter for public consumption with news, updates, contact information, etc.¹¹
- ACTION ITEM #12:** Produce monthly Economic Development Blog posts about pertinent information to the community¹²

Action Items

- ACTION ITEM #13:** Arrange and effect a schedule for a sub committee of Council to investigate a potential EDC election in the future¹³
- ACTION ITEM #14:** Assist in drafting a Memorandum of Understanding with third-party for management of Saginaw farmers market¹⁴
- ACTION ITEM #15:** Represent the City of Saginaw at the 2020 ICSC Red River States Deal-Making Conference and Expo to be held in Fort Worth on January 8-10th as ATTENDEE and provide Event Feedback Sheet¹⁵
- ACTION ITEM #16:** Produce a marketing report of The Retail Coach Cell Phone Analysis for public consumption and target marketing¹⁶
- ACTION ITEM #17:** Order and market #ILoveSaginawTX consumer swag for recruitment packages and sold to the public¹⁷
- ACTION ITEM #18:** Professionally design and print a Local Business Guide to go on the City's website and be available for pick-up at the Recreation Center, Senior Center, City Hall, given to businesses, etc.¹⁸
- ACTION ITEM #19:** Host quarterly Local Business Forum events and provide Recap Sheets¹⁹
- ACTION ITEM #20:** Take out a Shop Local advertisement in the Fort Worth Star Telegram²⁰
- ACTION ITEM #21:** Represent the City of Saginaw at the 2020 North Texas Commercial Association of Realtors Expo to be held in Dallas in September 2020 as ATENDEE and provide Event Feedback Sheet²¹
- ACTION ITEM #22:** Represent the City of Saginaw at various Real Estate Council of Fort Worth events held locally throughout the year and provide Event Feedback Sheets²²
- ACTION ITEM #23:** Organize and host Industry Council meetings in spring and fall 2020 with local industrial representatives²³

EXHIBIT A: SAGINAW 2020 WORK PLAN

- ¹ Work week to be defined as the hours of operation of Saginaw City Hall, 7:30 am to 5:30 pm Monday through Thursday and Friday 7:30 am to 11:30 am except on recognized holidays. Calls should be directed to Local Economics phone number (817-676-2403) or to Consultant cell (703-489-3324). Missed calls will be returned in a timely manner not-to-exceed a 48-hour wait time. Should these terms need to change for short durations, such as during Consultant holiday, Consultant will let Client know in advance and with clarity on how and when follow-up will take place.
- ² Administration of incentive agreements includes maintaining executed copies of all documents, verifying terms and conditions as outlined in individual agreements throughout the year, maintaining spreadsheet of terms and conditions for each agreement, verifying all payment requests and issuing check requests to City, providing annual reports to County and State as required by law, answering questions regarding incentives, ensuring all required documentation is accounted for, executed properly, and in compliance with City of Saginaw standards. An annual incentives summary will be provided to City as part of this Work Plan Action Item.
- ³ The Building Improvement Grant Program Marketing Plan and Schedule will be submitted to the City in final format no later than March 31, 2020.
- ⁴ Administration of BIG Program incentive agreements includes presenting applications to Council for consideration, drafting contracts for approval, administering the terms of the Agreements in a manner in compliance with the law, verifying receipts of service, and submitting all documentation for request fund reimbursements to the City of Saginaw in an acceptable manner, as well as maintaining and verifying the application of grant funds in in accordance with the Building Improvement Grant Program Policy.
- ⁵ As each individual project has a changing scope of needs over time, depending on the engaged parties and project, assistance shall include any and all professional guidance, solicitation of updates, negotiations, address of questions, written communication, conference calls, etc. for the mixed-use developments known generally as Cranz Farm, Lavonne White’s property, The Square, UCD Development at Bailey Boswell and FM 156, and the future Wayside Middle School development.
- ⁶ Boards and meaningful regional events include, but are not limited to, participation on the Community Link Board of Directors, the Hollenstein Career & Technology Center Advisory Board, the quarterly West Tarrant Alliance meetings, at the EMS-ISD Annual Realtor’s Expo, and other opportunities and determined by the City.
- ⁷ Marketing materials include a one-page snapshot of the community, the Community Profile and Aerial Map, and overview of sites available in the community. Other items included herein are those items of importance to recruitment meetings and efforts, including a letter about the Saginaw community, an updated traffic counts map, utility map information, and more. Up-to-date shall mean within a reasonable time frame of information validity and shall be regularly updated with the most current, professionally-recognized data available.
- ⁸ Recruitment Feedback Sheets are outlined on “Included in Contract Price” slide.
- ⁹ Retention Feedback Sheets are outlined on ”Included in Contract Price” slide.
- ¹⁰ Each Business Basics class is to last one hour, be open to the public on a topic of interest to new and growing business owners or entrepreneurs, and utilize current and correct information.
- ¹¹ Monthly E-newsletters will contain information of importance to local business stakeholders and will begin distribution before the end of February 2020 and continue monthly to a subscription list of individuals in the community electing to be included in the correspondence and at no time provided without their consent. All E-newsletters will be posted publicly online at the City’s website.
- ¹² Blog posts may be about any item of interest to the Saginaw business community, or community at large about the field of economic development and may be authored by guest writers where their expertise may prove valuable to the end objective. Blogs will be posted monthly no later than the last day of each month throughout the duration of the term. Blogs may be requested for draft approval prior to publication on the City’s website, if needed.
- ¹³ The EDC Investigatory Schedule will be sent to the City no later than March 31, 2020 and include a plan of action for a subcommittee of Council to fully investigate the merits of creating an Economic Development Corporation.
- ¹⁴ The MOU will be provided to the City prior to the 2020 farmers market season (spring 2020) with an approved community partner in a manner congruent with the wishes and input of the City throughout the negotiations.
- ¹⁵ Event Feedback Sheets are outlined on “Included in Contract Price” slide.
- ¹⁶ Visual report meant to take information provided from approved cell phone analysis and trade market area report with The Retail Coach previously approved by City Council, and turn it into a usable, easy-to-understand marketing sheet to be used in recruitment efforts. Visual to be provided to the City no later than March 31, 2020.
- ¹⁷ Design and items to be determined in conjunction with the City of Saginaw and, if sold, only through the City. City would pay only invoiced total for products ordered and may request additional quotes for pricing, if needed.
- ¹⁸ City would pay cost of third-party design firm and Consultant would supply all information and oversight for the project, as well as final distribution. City may request additional quotes for pricing, if needed.
- ¹⁹ Event Recap Sheets are outlined on “Included in Contract Price” slide. Three events would take place during the duration of the contract term; one in January, one in April, and one in July.
- ²⁰ In an effort to increase the visibility of the City of Saginaw and its existing businesses, the City may agree to pay the cost to take out an add in the Fort Worth Star Telegram to encourage consumers to shop locally in Saginaw. Consultant will provide advertisement content and manage agreement with advertising agency.
- ²¹ Event Feedback Sheets are outlined on “Included in Contract Price” slide. Attending the North Texas Commercial Association of Realtors and their Deal-Making expo is critical to regional and national marketing, recruitment efforts, and visibility. City would agree to cover the attendance cost and Consultant will represent Saginaw at event.
- ²² Event Feedback Sheets are outlined on “Included in Contract Price” slide. Attending the REC of Fort Worth events throughout the year are critical to regional marketing and visibility, as well as staying current on area trends and keeping in the loop on what opportunities exist in the regional market. City agrees to pay for event ticket prices and Consultant agrees to represent the City at these events.
- ²³ Organizing and developing an Industrial Council includes identifying potential board members, meeting with them to discuss opportunity, setting a plan of focus of the group, hosting biannual events, assisting with the creation of bylaws, election of officers, etc. City would agree to reimburse Consultant for any costs associated with the hosting of Industry Council events. Consultant will provide Recap sheets following events.

Action Items Time & Cost

Action Item	Scope	Deliverable(s)	Time Frame	Expected Cost to City
1.	On-call support by Consultant	Listed in Weekly Updates	Throughout term	-
2.	Administration of incentives	Noted in Monthly Updates & Incentives Annual Report	By end of term	-
3.	Marketing Plan for BIG Program	BIG Marketing Plan & Schedule	By end of first quarter	-
4.	Administration of BIG Program	Noted in Monthly Updates	Throughout term	-
5.	Assist in mixed-use developments	Noted in Monthly Updates	Throughout term	-
6.	Represent City in region	Event Feedback Sheets	Throughout term	-
7.	Keep up-to-date marketing materials	One-Page Overview, Sites Overview, Community Profile & Aerial Map, etc.	Throughout term	-
8.	5 recruitment meetings per month	Recruitment Feedback Sheets	Throughout term	-
9.	5 retention meetings per month	Retention Feedback Sheets	Throughout term	-
10.	Monthly Business Basics Classes	Eight monthly classes & Recap Sheets	Monthly except August	-
11.	Monthly E-Newsletters	Eight monthly newsletters	February to September	-
12.	Monthly ED Blog posts	Nine monthly posts	January to September	-
13.	Assistance in investigation of potential EDC	EDC Investigatory Schedule	By end of first quarter	-
14.	Assist with farmers market MOU	Memorandum of Understanding	Before spring 2020	-

Action Items Time & Cost

Action Item	Scope	Deliverable(s)	Time Frame	Expected Cost to City
15.	Represent City at 2020 ICSC Red River States Deal-Making Conference and Expo in Fort Worth, TX	Event Feedback Sheet	January 8 – 10, 2020	-
16.	Produce Visual for Cell Phone Analysis	Cell Phone Results Sheet	By end of first quarter	-
17.	Offer #ILoveSaginawTX merchandise	Items for recruitment and to sell/give	By end of first quarter	City to pay product costs up to \$500
18.	Professionally designed and printed Local Business Guide	Electronic and printed Local Business Guide	By end of term	City to pay design contract costs up to \$4,000
19.	Quarterly Local Business Forums	Three events & Recap Sheets	January, April, & July	City to reimburse hosting provisions up to \$1,000
20.	Take out Shop Local ad in Star Telegram	Shop Local advertisement	By mid-summer 2020	City to pay ad costs up to \$1,000
21.	Represent City at 2020 NTCAR Expo in Dallas, TX	Event Feedback Sheet	September 2020	City to pay registration costs up to \$300
22.	Represent City at Real Estate Council of Fort Worth events	Event Feedback Sheet	Throughout term	City to pay ticket costs up to \$1,000
23.	Creation of Industry Council	Two bi-annual events & Recap Sheets	April and September	City to reimburse hosting provisions up to \$1,000

Included in Contract Price

Client will receive:

- Weekly Update – Brief, emailed update on any and all work conducted of note during that week
- Monthly Update – Similar to departmental monthly update sheets, includes more detail on work completed in the month preceding
- Recruitment Feedback Sheet – Provides an overview of who Consultant met with, what was discussed, and if there is any follow-up intended (will be included in Monthly Updates)
- Retention Feedback Sheet – Provides an overview of who Consultant met with, what was discussed, and if there is any follow-up intended (will be included in Monthly Updates)
- Event Feedback Sheet – Following regional events, expos, or other recruitment events attended by Consultant on behalf of the City, this sheet will provide a summary of what the event was, what of note came from attending the event, and general follow-up needs
- Recap Sheet – Following any events hosted by the Consultant on behalf of the City, this sheet will provide a summary of what the event was, who attended, what the topics were, and what follow-up items there are
- Contract Overview Report – At the end of the contract term, Consultant will supply to the City, a report that outlines the work having been completed throughout the term of the Agreement and resultant performance indicators
- Presentation Support – Consultant is available to prepare and present Council Agenda item presentations, public speaking presentations for events, notes for speakers on economic initiatives, and more at the request of City Manager

Consultant will attend:

- Council Meetings – When there are items of economic consideration on the agenda, as determined by City Manager
- Staff Meetings – As allowed by City Manager
- Development Review Committee Meetings – When they involve potential commercial development opportunities
- Major Events of Organizational Importance – Such as employee events, team-building, staff appreciation, etc. in order to maintain and build rapport with staff, as approved by City Manager
- Individual Meetings – As requested by City Manager, at the behest of City staff, City Council, community partners, residents, etc.

Other:

- Expressed Title – Consultant will represent self as Director of Economic Development for the City of Saginaw on all emailed correspondence from City of Saginaw email address, will maintain City of Saginaw email address, and will continue to do the same on the City of Saginaw website, as requested by City Manager



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