

**CITY OF PEORIA, ARIZONA  
COUNCIL COMMUNICATIONS**

cc: 38R  
Amend No. \_\_\_\_\_

Date prepared: June 15, 2009

Council Meeting Date: July 7, 2009

**TO:** Carl Swenson, City Manager

**FROM:** Susan J. Daluddung, Deputy City Manager 

**PREPARED BY:** Scott Cooper, CecD, Economic Development Coordinator

**SUBJECT:** City Council to authorize the award of a professional services contract to ESI Corporation for the purpose of conducting a comprehensive higher education recruitment initiative, in an amount not to exceed \$46,615 for Phases 1 and 2.

**RECOMMENDATION:** Discussion and possible action to authorize City Manager to enter into an agreement for a professional services contract with ESI Corporation for the purpose of conducting a comprehensive higher education recruitment initiative, in an amount not to exceed \$46,615 for Phases 1 and 2. Also, authorize additional expenditure authority in the amount of \$53,358 for Phases 3 through 5, bringing the total expenditure authority to the budgeted amount of \$100,000.

Funding is available and payments will be made from Economic Development Department operating budget General Fund Community Promotions One-time Supplemental Account # 2010-1000-0351-522099.

**SUMMARY:** Council has identified a university/higher education strategy as a top priority for positioning Peoria for the future. In order to accomplish this goal staff has undertaken a higher education initiative. In May 2008 a Higher Education Stakeholders Visioning Process began. Community participants were nominated by the Mayor and each Councilmember to provide geographic/district representation and additional representatives were identified to participate based upon their relationships to Peoria. The goal was to engage the stakeholders into an interactive discussion of what higher education opportunities exist in terms of meeting the needs of Peoria residents.

The result of the visioning process was to determine that it was reasonable to pursue a higher education strategy for Peoria. The process confirmed this and concluded that the City should undertake an exercise to take this project to its next logical level and build off of the visioning process, its findings and recommendations.

**CITY CLERK USE ONLY:**

- Consent Agenda
- Carry Over to Date: \_\_\_\_\_
- Approved
- Unfinished Business (Date heard previous: \_\_\_\_\_)
- New Business
- Public Hearing: No Action Taken

ORD. # \_\_\_\_\_ RES. # \_\_\_\_\_  
LCON# 06109 LIC. # \_\_\_\_\_  
Action Date: \_\_\_\_\_

That next level is a comprehensive higher education study and recruitment initiative. The concept of using a consultant at this next level is to make aggressive strides to attract accredited higher learning institutions. The idea is to keep moving forward with concrete action plans and implementation strategies. To fulfill our goal, staff has identified a five phase process for the completion of this initiative, consulting services, and attraction of at least one accredited higher education institution. The phased approach is as follows:

- Phase I – Market Analysis and Feasibility Analysis
- Phase II – Economic Impact Analysis
- Phase III – Marketing and Business Attraction Plan
- Phase IV – Implementation Plan
- Phase V – Recruitment Assistance

However, as immediate opportunities arise, we will actively pursue all possible avenues.

This plan will take into consideration the healthcare cluster strategy and other planning initiatives in the City such as the Old Town Peoria Revitalization Plan and the Peoria Sports Complex District Urban Design Plan. Upon completion of Phase II, the need for the additional phases will be determined and a change order issued as appropriate for the remaining phases.

A Request for Proposals was issued and through the selection process staff is recommending ESI Corporation as the consulting firm to best complete this initiative. For nearly 19 years, ESI Corporation has been involved with helping communities create jobs and expand and diversify their economic base through the preparation of economic development strategic plans, market and feasibility analysis, economic impact assessments and marketing plan development and execution. ESI serves a wide array of public agencies and local governments, corporations, real estate developers and investors.

Based on a signed agreement, a kick-off meeting, by the end of July 2009, will be conducted with city staff to review the scope of services, discuss roles and responsibilities, and gather data and reports that are relevant to this project. Market and feasibility analysis will begin. Also, our first initial outreach to educational institutions will start in order to determine their level of interest and business plans for future expansion.

**FISCAL NOTE:** Funding for this study is available in the Economic Development Department operating budget General Fund Community Promotions One-time Supplemental Account Number 2010-1000-0351-522099.

**ATTACHMENT:**



## City of Peoria, Arizona Notice of Request for Proposal for Professional Services



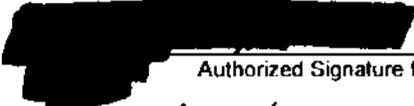
Request for Proposal No:	P09-0059	Proposal Due Date:	April 22, 2009
Services:	Higher Education Initiative Consulting Services	Proposal Time:	5 00 P M AZ Time
		Purchasing Agent:	Athena Bonner
Project No:	Location: City of Peoria, Materials Management	Phone:	(623) 773-7115
	Mailing Address: 8314 West Cannabar Street, Peoria, AZ 85345		

In accordance with City of Peoria Procurement Code, competitive sealed proposals for the services specified will be received by the City of Peoria Materials Management at the specified location until the date and time cited above. Proposals shall be in the actual possession of the City of Peoria Materials Management on or prior to the exact date and time indicated above. Late proposals will not be considered, except as provided in the City of Peoria Procurement Code. **Proposals shall be submitted in a sealed envelope with the Request for Proposal number and the offeror's name and address clearly indicated on the front of the envelope.** All proposals shall be completed in ink or typewritten. Offerors are strongly encouraged to carefully read the *entire* Request for Proposal Package.

### OFFER

To the City of Peoria: The undersigned, on behalf of the entity, firm, company, partnership, or other legal entity listed below, offers on its behalf to the City a proposal that contains all terms, conditions, specifications and amendments in the Notice of Request for Proposal issued by the City. Any exception to the terms contained in the Notice of Request for Proposal must be specifically indicated in writing and are subject to the approval of the City prior to acceptance. The signature below certifies your understanding and compliance with Paragraph 1 of the City of Peoria Standard Terms and Conditions (form COP 202) contained in the Request for Proposal package issued by the City.

For clarification of this offer contact:

Name: <u>Judie Scalise</u>	Telephone: <u>602-265-6120</u> Fax: _____
<u>ESI Corp</u> Company Name	 Authorized Signature for Offer
<u>300 W. Clarendon, Ste 470</u> Address	<u>Judie Scalise</u> Printed Name
<u>Phoenix</u> <u>AZ</u> <u>85013</u> City State Zip Code	<u>Principal</u> Title

### ACCEPTANCE OF OFFER AND CONTRACT AWARD (For City of Peoria Use Only)

Your offer is accepted by the City, subject to approval of each written exception that your proposal contained. The contract consists of the following documents: 1.) Request for Proposal issued by the City; 2.) Your offer in Response to the City's Request for Proposal; and 3.) This written acceptance and contract award.

As the awarded professional service provider, you are now legally bound to provide the services listed by the attached award notice, based on the solicitation of proposals, including all terms, conditions, specifications, amendments and your offer as now accepted by the City. The professional service provider shall not commence any billable work or provide any services under this contract until the professional service provider receives an executed Purchase Order or a Notice to Proceed.

Attested by:  _____ Mary Jo Kief, City Clerk  CC: <u>388-717109</u>  Contract Number:  <b>LCON06109</b>  Official File: _____	City of Peoria, Arizona. Effective Date: _____  Approved as to form:  _____ Stephen M. Kemp, City Attorney  Contract Awarded Date: _____  _____ Carl Swenson, City Manager
--	--

ORIGINAL.

ESI Corp Proposal Submitted to:

City of Peoria, Arizona

Request for Proposal #P09-0059

# Higher Education Study and Recruitment Initiative



April 22, 2009

**Peoria Higher Education Initiative  
Consulting Services**

City of Peoria  
Request for Proposal  
P09-0059

**TABLE OF CONTENTS**

Offer and Contract Award Page.....	ii
Questionnaire .....	iii
1. Project Understanding .....	1
2. Project Approach .....	1
3. Work Plan Schedule .....	5
4. City Assistance.....	5
5. Background & Experience .....	5
5.1 ESI Corp Relevant Experience .....	6
6. Staff Capabilities & Role.....	7
7. Fee.....	9
8. ESI References.....	9

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

## 2. PROJECT UNDERSTANDING

Education is a key component to a strong and sustainable regional economy. Communities which offer a broad and diverse range of education choices enhance the quality of life of their residents and are more likely to be successful in their business attraction efforts. The business of education services is growing rapidly throughout the country today and west coast cities, generally speaking, are underserved relative to the northeast in terms of the breadth of existing education institutions.

Attracting higher education institutions can be a key component to an overall business attraction program. It can also be leveraged to enhance other industry attraction efforts by creating additional opportunities for training and potential partnerships. Expanding educational opportunities will help to foster a strong and diverse community and aid in boosting the creation of quality jobs and raising incomes.

Including education as one of the city's business targets can also help create other positive effects on the area. Siting facilities within proximity to one another, for example, will enhance the economic feasibility of mass transit, including commuter rail stops associated with transit development. It can also serve to facilitate coordination and partnerships between institutions and aid in the coordination of internship opportunity offerings, career fairs and other partnering arrangements between businesses and education providers.

The City of Peoria spent the last year investigating the attraction of higher education institutions through a stakeholder's committee. The committee agreed upon a vision for Peoria and identified existing gaps in education and specific opportunities to be pursued. Given that much of the groundwork has been laid, this response for consulting services is designed to build off of the visioning process, its findings and recommendations.

It is the city's desire to retain the services of a consulting firm to conduct a comprehensive higher education study and recruitment initiative. This study

should take into consideration the healthcare cluster strategy and other planning initiatives in the city such as the Central Peoria Revitalization Plan and the Peoria Sports Complex District Urban Design Plan. An opportunity to leverage these strategies and locations to attract higher education facilities or programs is highly desired on the part of the City.

To fulfill this scope of work, Peoria has identified a five phase process for the completion of the higher education initiative consulting services and attraction of a higher education institution. The initial contract will be for the first two phases and pending the outcome of these two phases the City will make a determination whether to pursue the remaining phases.

## 2. PROJECT APPROACH

ESI will work closely with an oversight committee which will include stakeholders from key public and private sector organizations. This oversight committee will meet periodically and be the sounding board for research findings, ideas and recommendations as it relates to identifying and recruiting higher education institutions. Committee makeup will include city economic development staff, city finance staff, real estate brokers (who specialize in higher education clients), private land owners, developers and others as appropriate.

A total of 4 Oversight Committee meetings have been scoped out during the course of the planning process. The schedule of meetings proposed is as follows:

- Meeting #1: Presentation of Phase 1 findings and discussion regarding preliminary education targets
- Meeting #2: Presentation of the economic impact analysis and discussion regarding next steps
- Meeting #3: Presentation of marketing and strategies
- Meeting #4: Presentation of the implementation strategies

In addition to the Oversight Committee meetings, ESI has scoped out three meetings with city staff, which

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

includes a kick off meeting and follow-on meetings to review preliminary work. These staff meetings will be held prior to the Oversight Committee meetings.

Draft reports for each deliverable will be submitted to the city electronically for distribution to staff and the Oversight Committee. One copy and an electronic version of the final report for each deliverable will be provided to the City.

## **PHASE 1 – Market and Feasibility Analysis**

A kick-off meeting will be conducted with city staff to review the scope of services, discuss roles and responsibilities, and gather any data and reports that are relevant to this project. Organizing the oversight committee will also be discussed as well as identifying future meeting dates.

### **A. Market Analysis**

Analyzing the market for the siting of higher education institutions begins with understanding their key site location requirements. ESI will build off of our Education Cluster research prepared for Henderson, Nevada, during which we learned that institutes of higher learning evaluate population and growth rates for the entire commute shed, including graduation rates, and the presence of competition. Different niches within the industry consider three distinct age groups:

- Young adults going directly to college or technical schools
- Mid-career adults updating their skills or changing careers
- Retirement age persons desiring to enhance their quality of life

To understand the market, we will prepare a comprehensive socio-demographic analysis of Peoria and the commute shed utilizing tables, charts, graphs and GIS mapping to present our findings. An inventory of existing institutes of higher learning and career technical education facilities will also be compiled and mapped. This information will be presented in a table that identifies each institution by name, address, enrollment and key curriculum. Accompanying this

table will be a thematic map showing the location of each facility, city boundaries and the commute shed.

Potential higher education sites (vacant land and existing buildings) in Peoria will be inventoried and recorded in a matrix table which will provide information such as: site address, number of acres or square feet of space, existing infrastructure capabilities, area amenities/resources, partnership opportunities, etc. This inventory will include at a *minimum* the Central Peoria Redevelopment Area, Peoria Sports Complex, Loop 303 Research Park, applicable State Trust Lands, and existing office buildings, including relevant "grey" space.

### **B. Feasibility Analysis**

In identifying the types of education institutions that are suitable for Peoria, ESI will start by reviewing several documents including the visioning report from 2008, the West Valley Labor Market Study, the Healthcare Cluster Strategy, current list of education targets, the Peoria Sports Complex District Urban Design Plan, the Central Peoria Revitalization Plan, and others as appropriate.

Determining the feasibility of locating higher education institutions to Peoria will be dependant upon an understanding of local resources that can be utilized to foster this activity as well as the level of interest on the part of higher education institutions. The feasibility analysis will consist of two primary tasks:

**Staff Interviews** – Meetings/Interviews with key city staff will be conducted to review and discuss potential sites and buildings in Peoria. Questions such as the use of incentives and joint use agreements, policy and permitting, financial partnerships, legal constraints and political receptivity will be covered. The research findings from these meetings will serve as background information for Phase 1 and provide a starting point for drafting promotion and implementation strategies (Phases 3 and 4).

**Higher Education Survey** – Reaching out to private educational institutions will be necessary to *determine* their level of interest and business plans for

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

future expansion. ESI will conduct a survey to an agreed upon list of private non-profit and private for profit higher education institutions in the United States. This list will include institutions who are deemed prestigious with name recognition and whose curriculum or program matches that identified in the visioning document, such as renewable energy, health care, sustainable technologies, hospitality/tourism, etc. In addition, ESI will assist Peoria in identifying post-secondary Career Technical Education (CTE) schools that meet the needs of the community and region. An agreed upon list of CTE schools will also be surveyed.

To keep costs down, this will be a web-based survey in which ESI will mail a letter to each institution requesting their participation in the survey and directing them to a URL where they can respond on line. To ensure a high response rate, ESI will follow-up by telephone to those who have not responded to the survey.

Findings of this survey will provide Peoria the opportunity to learn first hand site location requirements, desired incentives, and future expansion plans of these education facilities. Additionally, it will open the door to establishing an ongoing dialog.

Utilizing the findings from this phase, ESI will begin to identify potential targets (degree granting and CTE) which will help define the community's needs for higher education. The first round list of prospective education institutions will be created for review and discussion with the Oversight Committee.

*Deliverable: Written report summarizing the research findings, interviews, survey findings and potential targets*

## **PHASE 2 – Economic Impact Analysis**

Understanding the potential economic impact that various educational institutions can have on the area economy will be valuable to Peoria as they evaluate their decision to initiate a higher education initiative. The findings of the impact analysis can be used to brief policy makers, strategically target various

segments of higher education, and design a recruitment program.

The higher education industry is significantly diverse in size and scope. In preparing the impact analysis, ESI will begin by utilizing the preliminary education targets agreed to in Phase 1. We will collaborate with the City and agree upon a series of assumptions or scenarios that will be utilized in measuring the direct and indirect economic and fiscal impacts that siting these facilities in Peoria will have on the area economy. Assumptions could include: number of education facilities, size of payroll, square feet of owner versus tenant occupied space, value of construction, student enrollment, value of local purchases, and the like.

ESI has vast experience in conducting economic and fiscal impact analysis and utilizes IMPLAN software, which is nationally recognized by the federal government and national economists. Based on the agreed upon assumptions and scenarios, results of this analysis could be presented by type and or size of institution, as well as in the aggregate. Results of this analysis will provide the City with an understanding of the direct, indirect and induced impacts to the economy as it relates to jobs, payroll and total output.

ESI will meet with the Oversight Committee to present the findings of the economic impact analysis and discuss next steps.

*Deliverable: Written report summarizing the assumptions and findings of the economic and fiscal impact analysis.*

## **PHASE 3 – Marketing and Business Attraction Plan**

Marketing and promotion strategies will be designed around the sites and buildings that Peoria would like to promote and geared towards the top higher education targets within three geographies: local, national and global. Strategies will be devised and incentives will be identified to market sites and attract institutions and programs. The marketing strategies will identify various incentives and how they could be utilized. A communications program to reach both public and private stakeholders and media will be



# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

created. This will include the utilization of various forms of outreach, including web mail.

A well-organized, strategic campaign should map out marketing tactics, milestones and different phases of the program, as well as systems to measure the program's results. A strategic marketing campaign would draw on the most effective methods, and could include a combination of the following:

- Communications Strategy
- Media Relations Media Tours
- Interviews, and Press Conferences
- Familiarization (FAM) Tours
- Advertising
- Industry Networking/Targeting
- Collateral Material
- Direct Mail
- E-newsletter / Web Sites
- Expo/Trade Shows

Strategies will be devised that identify milestones and various phases of the marketing program. ESI will prepare a detailed budget based on the dollars Peoria has available to fund the marketing strategies. We will meet with the Oversight Committee to present the draft marketing strategies and make refinements as appropriate.

*Deliverable: Marketing and Business Attraction Plan, timeline and budget*

## **PHASE 4 – Implementation Plan**

Following the development of the marketing and business recruitment plan will be the development of the implementation plan. This plan will incorporate the key findings and recommendations from the prior phases and complement the marketing plan. Findings will include the identification of higher education targets, survey findings such as key site location criteria, potential economic impact that could be achieved, list of desirable incentives, and targeted sites within the city to market.

The implementation plan will identify the action steps to be undertaken in order to kick off and sustain the

higher education initiative. Milestones will be agreed upon with city staff and cost estimates will be developed as appropriate.

A draft plan will be presented to the Oversight Committee for feedback and modification. Once this plan has received approval from city staff and the Oversight Committee, ESI will present the implementation plan to the Peoria City Council.

*Deliverable: An implementation plan and budget*

## **PHASE 5 – Recruitment Assistance**

ESI will assist the city staff with the recruitment of at least one accredited degree-based institution. ESI will collaborate with the city economic development staff and could provide some or all of the following services to the city:

- Oversee and facilitate the marketing plan implementation
- Oversee the preparation of the marketing materials used to attract education institutes
- Conduct business calls to prospective education institutes and follow-up as appropriate
- Organize business visitations for Peoria staff
- Help determine the level and amount of incentives that could be made available

The City will be responsible for funding the recruitment activities under this phase of the scope of services, including the activities agreed upon in the marketing and business attraction plan. This could include collateral marketing material creation, FAM tours, direct mail, and other promotional activities.

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

An eight month schedule has been prepared to complete Phases 1 through 4 of this scope of work. It is anticipated that Phase 5 will commence after the completion of the first four phases.

Phases 1 and 2 will take approximately four months to complete. At the end of phase 2 (month 4), the city will decide whether to proceed with the remaining phases.

To complete this scope of work within the aggressive timeframe outlined, ESI will rely on the city for assistance with the following activities:

- Identify and invite representatives to serve on the oversight committee.
- Arrange for Oversight Committee meetings, including securing the meeting room and notifying the Oversight Committee of meeting dates, time and location.
- Provide copies of draft materials to Oversight Committee members for review.
- Identify key city staff to interview under Phase 1 of this project.
- Timely review of draft materials.

	Months							
	Phases 1-2				Phases 3-4			
	1	2	3	4	5	6	7	8
<b>Phase 1. Market Analysis</b>								
Kick off meeting with staff	X							
<b>A. Market Analysis:</b>								
Socioeconomic Analysis								
Inventory and GIS mapping								
<b>B. Feasibility Analysis:</b>								
Staff interviews								
Higher Education Survey								
Oversight Committee Meeting		O						
<b>Phase 2. Economic Impact</b>								
Preparation of Assumptions								
Develop model and run analysis								
Oversight Committee Meeting				O				
<b>Phase 3. Marketing Strategies</b>								
Creation of marketing strategies								
Milestones and budget								
Meeting with staff					X			
Oversight Committee Meeting						O		
<b>Phase 4. Implementation Plan</b>								
Implementation plan & action steps								
Milestones and budget								
Meeting with staff							X	
Oversight Committee Meeting								O

Phase 5 of this scope of work will follow the completion of Phase 4 and conclude upon the attraction of at least one higher education institution, or upon some other mutually agreed upon timeframe.

ESI Corp was founded in 1990 and is a multi-disciplinary economic development and real estate services consulting firm with clients throughout the U.S. We offer a broad range of economic development and economic research, advisory and predevelopment planning services to a clientele consisting of both public and private sector organizations.

For nearly 19 years, ESI Corporation has been involved with helping communities create jobs and expand and diversify their economic base through the preparation of economic development strategic plans, market and feasibility analysis, economic impact assessments and marketing plan development and execution. ESI serves a wide array of public agencies and local governments, corporations, real estate developers and investors.

Over the years our extensive work in economic development has included the following:

- Researching and identifying industry targets that are suitable to an area
- Preparing strategic marketing plans and promotion campaigns

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

- Spearheading recruitment efforts, including marketing plan implementation and conducting business calls
- Providing corporate site location assistance, including incentive negotiation and workforce assessments
- Conducting project specific economic and fiscal impact studies
- Preparing SWOT analyses to understand the foundations (labor, infrastructure, education, etc.) that both support and sustain economic development.
- Developing economic development strategies to help communities diversify or expand their economic base.
- Identifying benchmarks and performance measures to evaluate plan implementation.

We have assisted countless cities, counties, states, and economic development organizations throughout the U.S. to develop or fine-tune their economic development programs and strategic initiatives. Our multi-disciplined consulting services group has the experience and expertise to help regions and communities grow their economies and create jobs by determining which business sectors they should focus on.

Our economic development services include:

- Marketing plan development and recruitment assistance
- Economic development strategy plans
- Downtown and neighborhood redevelopment strategies
- Economic and fiscal impact studies
- Market analysis and feasibility studies
- Economic base and SWOT analysis
- Demographic and labor market studies
- Workshops, focus groups, interviews and surveys
- Cluster and target industry analysis
- Community needs assessment and benchmark analysis

## 5.1 ESI Corp Relevant Experience

ESI has a comprehensive portfolio of relevant experience relating to the tasks required under the Peoria Higher Education Initiative. Our consulting background in business targeting, economic impact analysis, strategic planning, marketing plan development and business recruitment gives us a broad based understanding of what is necessary to successfully analyze and launch the higher education business attraction initiative. Below are representative examples of projects that contain elements of the Peoria project.

### **City of Henderson (NV) Higher Education Economic Development Initiative.**

ESI was retained by the City of Henderson to research a targeted incentive program geared towards the attraction of higher education institutions. This work entailed defining education as an industry cluster, preparing an inventory of existing education institutions, interviewing site selection representatives from higher education institutions, and conducting desk research. A report was prepared with our findings including recommendations on the types of incentives that should be offered. To date, the City of Henderson has been successful in locating 13 private colleges/universities ranging in size from 5,000 square feet to 250,000 square feet.

### **Lockheed Martin Training Facility Economic Impact Study**

On behalf of Lockheed Martin, ESI conducted an economic and fiscal benefits study resulting from the development of the proposed Aerial Common Sensor (ACS) Training and Sustainment Center (ATSC) in Sierra Vista, Arizona. ESI calculated the direct, indirect and induced impacts of employment and revenue, as well as the taxes that would be generated to the various government and educational entities if the proposed facility located in Sierra Vista. The findings of this analysis were used to help determine the value of incentives that could be offered by local and state governments.

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

## City of Avondale Economic Development Marketing and Promotion Plan

After completing the comprehensive economic development strategy plan for the City of Avondale, ESI was retained by the city to also create a marketing and promotion plan that built off of the city's economic strategy. In this regard we conducted a marketing audit of existing plans and collateral materials, created a lead generation and sales prospecting plan, including an implementation calendar and budget.

## Marketing Implementation and Business Recruitment for the New Mexico Economic Development Department

ESI conducted a multi-year technical advisory services and recruitment campaign on behalf of the State of New Mexico. We worked with the Department of Economic Development and their advertising agency to create an annual marketing plan. From this plan emerged an integrated business recruitment campaign focusing on various industries and geographic centers. A database management system was created using sophisticated software to track outreach efforts such as telephone calls, personal site visits, and correspondence.

## Salt River Project Targeted Industry Marketing Implementation

Working with the economic development staff of the Salt River Project, ESI implemented a targeted industry marketing program aimed at the aerospace industry. Efforts included implementing a telemarketing campaign in Southern California and the Mid-Western United States, and conducting interviews with key aerospace employers and their supplies to identify opportunities for future projects.

## Central Peoria Revitalization Plan

As a sub-consultant to PMC, ESI recently conducted a market analysis to help guide the overall revitalization plan relating to square feet of supportable retail and office uses, as well as number of housing units. This analysis included defining the trade area, evaluating the socio-economic mix of residents, reviewing

historical development trends, and conducting a demand analysis for residential, retail and office. Finally we prepared recommendations on the square feet of supportable land uses.

## West Phoenix Revitalization Area Economic Development Plan (Phoenix, AZ)

This planning process was funded by EDA for a 52 square mile area in west Phoenix. The plan entailed reviewing existing plans, studies and reports relating to west Phoenix and drafting a summary of the key findings. Community input was solicited to understand first hand the unique circumstances, issues and opportunities of this largely Hispanic population that resides in west Phoenix. ESI facilitated focus groups, conducted a community forum and presented preliminary goals and objectives to key stakeholders. Based on the desk research and the voluminous community feedback, a five year economic development plan with a one-year action plan was created and submitted to EDA for approval.

## Other Peoria Projects:

- Economic impact studies on both Quintero and Vistancia (formerly Lakeland Village) to aid the city staff and council members in making annexation decisions
- Economic Development Plan (2002) for the city's general plan

## 3. STAFF CAPABILITIES & ROLE

Below are biographies highlighting the capabilities of each of person who will be working on this initiative.

### Judie A. Scalise, Principal, ESI Corp

*Project Role: Principal in Charge, market feasibility, marketing and implementation plans, report preparation and recruitment*

The founder and Principal of ESI Corporation, Scalise specializes in economic development, site selection, and pre-development planning services to a clientele consisting of government agencies, corporations,

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

private developers, school districts and utility companies. Ms. Scalise brings nearly 30 years of professional experience in the areas of strategic planning, economic development, economic and market analysis, and corporate site selection. As the Principal of ESI Corp, Ms. Scalise has directed numerous consulting assignments consisting of economic development strategic planning, economic and fiscal impact studies, land economics research, and market feasibility. She has provided economic development advisory services which include marketing plan development and collateral marketing material preparation and she has designed, managed and conducted studies for both public and private-sector clients in the fields of real estate economics and public-development strategy.

Prior to forming ESI Corporation, Ms. Scalise worked as the Director of various economic development organizations including the Arizona Department of Commerce, Business and Trade Division, and the Phoenix Economic Growth Corporation. She also served as Vice-President of Industrial Development for The Arizona Bank (now Bank of America).

Ms. Scalise holds a B.S. degree in Public Administration from the University of Arizona and is a graduate of the Economic Development Institute at the University of Oklahoma. She holds the professional designation of Certified Economic Developer (CEcD) and is a past Chairperson of the International Economic Development Council and the Arizona Association for Economic Development.

Ms. Scalise serves on the CALED Board of Directors and teaches strategic planning at the semi-annual CALED Fundamentals Course. In addition she teaches business retention and expansion at the Basic Economic Development Course in Tucson, Arizona and has taught corporate site selection at the Basic Economic Development Course in Silver City, New Mexico. Ms. Scalise is a member of the Arizona Association for Economic Development, CALED, the Urban Land Institute, and the International Economic Development Council.

## **Michael B. Bell, Project Manger, ESI Corp**

*Project Role: Market analysis, GIS mapping, and report preparation*

Mr. Bell specializes in Urban Planning and Geographic Information Systems (GIS) and focuses on community and economic development planning projects at ESI Corp. This includes organizing and managing projects, leading focus groups and interviews, and developing economic development strategic plans and general plan elements. In addition, Mr. Bell is exceptionally talented in the utilization of software packages covering all aspects of geographic information systems, databases and spreadsheets, vector and raster graphics, cartography, 3D visualization, computer aided design and project management.

Prior to joining ESI Corp he was employed with a national engineering firm, WRG Design, where he managed over 35 projects through the site planning and land use entitlement process in Oregon and Washington, including the development of public school campuses, regional retail centers, large residential communities, and industrial developments. While employed at the City of Mesa, AZ, he was entrusted with a variety of planning projects ranging from one of the largest health care facilities in Arizona to innovative mixed use developments to regional industrial and commercial centers.

## **Chris Erwin, Research Associate, ESI Corp**

*Project Role: Economic impact analysis, market analysis and feasibility, and report preparation*

Chris Erwin is a Research Associate and Economist with ESI Corporation and has worked on a variety of consulting assignments, including preparing qualitative and quantitative market analysis, industry target analysis, strategic implementation plans, conducting primary research, and modeling economic impacts. In addition, Mr. Erwin has solid experience analyzing local and regional economic trends, forecasting, and strategic planning. Most of his work entails conducting in-depth market analysis, feasibility studies, and various types of related projects for clients.

# Peoria Higher Education Initiative Consulting Services

City of Peoria  
Request for Proposal  
P09-0059

Mr. Erwin brings experience in applied economics, strategic planning, and research methods. Furthermore, he holds an extensive background in analyzing and forecasting trends in local housing markets.

U. FEB

Below is the cost per phase to complete the Peoria Higher Education Initiative.

	Fee
Phase 1	\$ 38,360
Phase 2	\$ 8,255
Phase 3	\$ 8,000
Phase 4	\$ 6,300
Phase 5	\$ 38,975
<b>Total</b>	<b>\$ 99,890</b>

The total fee for Phases 1 and 2 is \$46,615. The total for all phases is \$99,890. All rates are inclusive of expenses, which include postage, long distance, travel, black and white and color copying, binding, data acquisition, etc.

## ESL REFERENCES

ESI is pleased to provide the City of Peoria with references for selected strategic planning, industry targeting and marketing plan projects.

Bob Cooper  
Economic Development Director  
City of Henderson  
Economic Development Division  
240 Water Street  
Henderson, NV 89015  
702-267-1654

Projects: Higher education incentive and cluster analysis

Ms. Kate Kreitor  
City of Phoenix Neighborhood Services Dept.  
200 W. Washington, 4th Floor  
Phoenix, AZ 85003-1611  
602-256-3302

Project: West Phoenix market analysis and revitalization plan

Mr. Gary Marks  
Prescott Valley Economic Development Foundation  
7120 E. Pav Way, Suite 106  
Prescott Valley, AZ 86314  
928-775-0032

Projects: Economic development strategic plan, economic development marketing plan and operating cost analysis

Mr. Charlie McClendon, City Manager  
City of Avondale  
11465 West Civic Center Drive  
Avondale, AZ 85323  
623-333-1015

Projects: Impact analysis, economic development and marketing plans