



**REQUEST FOR PROPOSAL FOR  
Full Time Executive Director, District Manager, or District  
Management Company for the Lake Merritt-Uptown District  
Association and Downtown Oakland Association – October 2018**

The Lake Merritt-Uptown District Association (LMUDA) and Downtown Oakland Association (DOA) are seeking a qualified “Executive Director”, “District Manager” or “District Management Company” to serve in the capacity of an onsite full-time overseer of the special benefit services performed in the district. Individuals, group of individuals or management companies are encouraged to apply to administer and oversee the services of the new CBDs. The conditions of employment or contract for services for this position are as follows:

**Terms and Conditions:**

The LMUDA and DOA are **two public benefit corporations whose primary functions are to administer the Lake Merritt-Uptown and Downtown Oakland Community Benefit Districts**. The Lake Merritt-Uptown CBD and Downtown Oakland CBD have contracts with the City of Oakland to administer the revenues for these assessment districts. The special benefit services funded by these two CBDs include maintaining security, cleanliness and order in the public rights of way, improving district identity, running the web site and all district events, serving the corporations’ administrative needs and advocating on behalf of the area’s property owners, business owners and residents. The CBDs are mandatory assessment districts that fund special benefits or those services over and above currently provided by the City of Oakland.

**Experience required:**

- A minimum of 5 years working with public benefit, non-profit corporation Board of Directors;
- Understanding of assessment district law and Proposition 218 special benefit requirements;
- Understanding of the workings of a district management corporation;
- Entrepreneurial and creative, with a strong team spirit;

- Working independently without direct supervision;
- Ability to effectively communicate with stakeholders (property owners, business owners and residents);
- Ability to maintain records of the Associations;
- Financial management experience including budgets;
- Knowledge of basic property management;
- Knowledge of maintenance of the public rights of way and public space activation;
- Ability to oversee, supervise, hire and fire sub-contractors, maintenance staff and office staff;
- Basic knowledge of public relations, social media and marketing experience strategies;
- Strong written and verbal communication skills;
- Ability to work flexible hours and be on-call seven days per week;
- Identify and pursue successful funding sources outside of the management corporation;
- Familiarity with the departments, staff, and City Council of the City of Oakland;
- Knowledge of the land use and development process in the City of Oakland.

Hours required:

The Executive Director or District Manager shall be on site or on the job a minimum of 40 hours per week, normally Monday through Friday, 9:00 to 5:00, however may include evening and weekend work. A district management company or consultant team will have a larger personnel budget and will be expected to staff the office a minimum of 40 hours per week.

Duration:

The LMUDA and DOA Executive Director, District Manager or District Management Company employment/contract agreements shall commence on January 1<sup>st</sup>, 2019 and remain in force for one year unless earlier terminated by the respective Board of Directors. The LMUDA and DOA shall each retain the right to terminate the employment agreement upon a 30 day notice.

Employment status:

Individuals, companies or partnerships with appropriate experience are encouraged to apply for this position. The LMUDA and DOA will enter into an employee/employer or independent contractor relationship with the selected candidate(s) or companies, based upon legal requirements. The main point of contact for the selected candidate or company shall be the Presidents of the Corporations.

## EXPECTATIONS OF THE SELECTED CANDIDATE OR COMPANY

### IMPLEMENTATION OF SERVICES:

- a. Review the Management District Plans to become knowledgeable of the “Management District Plans” and scope and depth of special benefit services voted upon by the property owners of each district. In that light, be prepared to oversee contract providers for security, landscaping, sidewalk maintenance, etc. to ensure the highest level of services for the benefiting property owners, residents and businesses. Be knowledgeable of the limitations of the “special benefit services” as explained in Article XIII (D) of the state constitution;
- b. Interface with district property owners, residents, businesses, visitors and City officials as necessary in response to the delivery of services;
- c. Walk the district regularly to ensure the highest level of maintenance and security is provided;
- d. Pay particular concern to ingress and egress for traffic generators including BART stations, bus stops, employee lounge areas, public spaces and cultural amenities in the district;
- e. Report to the City immediately on any and all hazardous conditions in the public rights of way;
- f. Attend the regular joint security meetings held by the LMUDA or DOA private security company;
- g. Monitor frequently the level of problematic issues in the public rights of way;
- h. Respond to constituent concerns with face to face interaction as quickly as possible;
- i. Interface with all City, County, BART and other public officials (City of Oakland, Public Works, Department of Transportation, and OPD), on any and all matters concerning the business of the corporations;
- j. Respond to e-mails or inquiries by Board members or constituents with all due speed.
- k. Advise Board Committees on the implementation of strategies that promote the welfare of Lake Merritt-Uptown and Downtown residents, property owners, businesses and community members;
- l. Seek new ways to maintain the order and dynamic neighborhood ambiance of Lake Merritt-Uptown and Downtown Oakland for its residents, property owners and businesses.

## II. **CORPORATE ORGANIZATIONAL SUPPORT**

- Board meeting clerical, administrative and organizational support*
  - a. Attend and conduct Board and Organization/Executive Committee meetings;
  - b. Prepare all Board packets, post consistent with the Brown Act requirements;
  - c. Distribute Board packets prior to the meetings;
  - d. Prepare and distribute all committee and task force packets prior to the meeting;
  - e. Work closely with Presidents and Committee Chairs in the preparation of meetings;
  - f. Attend all Board Standing Committee and Task Force meetings;
  - g. Help direct and manage board discussions
  - h. Review and correct all minutes for accuracy;
  - i. Maintain all corporate meeting records consistent with the Brown Act provisions.

## III. **GENERAL ADMINISTRATION**

- Fiscal*
  - a. Oversee organizations' budgets and fiduciary responsibilities;
  - b. Monitor Committee budgets to make sure they are in line with projections;
  - c. Prepare financial statements and prepare checks as necessary;
  - d. Ensure compliance with all aspects of the BIDs' contracts with the City of Oakland, submission of annual reports, and audited financials as requested;
  - e. Maintain an up-to-date database of all BID property owners;
  - f. Work with auditor for annual 990 reports and audits to the City.
- Supervisory*
  - a. Oversee district-wide services including security, maintenance, pedestrian safety, and streetscape improvements; comply with organizational policies and procedures;
  - b. Supervise administrative assistants, consultants and interns as necessary.
- Office*
  - a. Equipment acquisition and maintenance;
  - b. General maintenance, cleaning and organization.
  - c. Maintain office and related Board assets;
  - d. Ensure public accessibility to records and minutes of the corporations.

## IV. **LIAISON, MARKETING AND PUBLIC RELATIONS**

- Inform and educate the public about mission and goals of organization;
  - a. Serve as spokesperson to the media and stakeholder groups;
  - b. Respond to media requests and all BID inquiries;

- a. Work with creative services and marketing firm on all aspects of promoting the districts;
- b. Manage websites and online presence and ensure that the websites serve as the central marketing tool for the BIDs;
- c. Manage social media accounts.

**V. STAFFING FOR EVENTS**

- Provide staffing or oversee sub-contractors for new LMUDA and DOA events as part of this contract and as instructed by the Board and its Committees.

**VI. OTHER ISSUES**

- The District Manager shall implement any and all other tasks as prioritized by the respective Boards of Directors or Officers as may arise from time to time;
  - d. Knowledge of land use issues and urban zoning issues is helpful;
  - e. Knowledge of district identity strategies to promote a positive image of the districts is helpful;
  - f. Knowledge of public space development and maintenance is helpful;
  - g. Familiarity with the California Downtown Association, International Downtown Association or other trade associations is helpful;
  - h. Experience in public speaking is helpful.

**VIII. SUBMISSION INSTRUCTIONS:**

Please mail or hand-deliver three (3) hard copies as well as a digital copy of your proposal for this RFP to the address below on or before **November 1<sup>st</sup>, 2018**:

**Tania Jackson**

1111 Broadway  
Suite 120  
Oakland, CA 94607

**[tania.jackson@cbre.com](mailto:tania.jackson@cbre.com)**

For any questions or clarifications required during the RFP, please send your inquiries via email to **[tania.jackson@cbre.com](mailto:tania.jackson@cbre.com)** by no later than noon on October 19, 2018. The final list of questions and answers shall be posted after the close of the question period.

No questions regarding this RFP will be answered over the phone. Failure to abide by this requirement may subject proposers to disqualification from the selection process.

Selected finalists will be invited for a presentation on **Tuesday, November 13, 2018 from 1-3:30p.m.** at 388 19th St., Oakland, CA 94612. The presentation will be given to a panel comprised of members of the Downtown Oakland Association and Lake Merritt-Uptown District Association Boards of Directors.

The DOA and LMUDA reserve the right to accept, negotiate, reject or propose amendment to any and all proposals submitted for administration of the districts. The selection process will be determined based

upon district management experience, knowledge of the law, experience in working with non-profit Boards and knowledge of the City of Oakland. We reserve the right to reject any and all applicants as well as to determine that we will not fill this position.