

**REQUEST FOR PROPOSAL FOR A DISTRICT MANAGER FOR THE
UPTOWN WHITTIER IMPROVEMENT ASSOCIATION (UWIA)
November 2022**

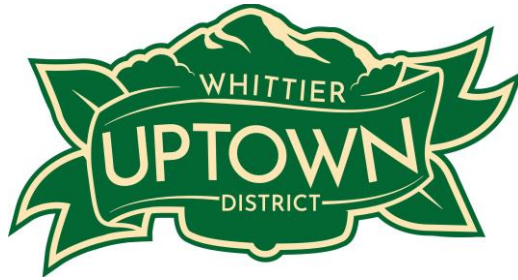
The Uptown Whittier Improvement Association (UWIA) is seeking a qualified District Manager who will be the principal administrative and executive official of the Uptown Whittier Improvement Association. The District Manager is appointed by and serves at the discretion of the UWIA Board of Directors. Under policy direction of the UWIA Board of Directors, the District Manager will execute, lead, and coordinate the management and administrative policies and directives, conduct administrative studies of District operations, procedures and department budget requests; prepare recommendations to the UWIA Board of Directors for ultimate policy decision; direct the preparation of a structurally balanced budget for all District funds; and perform related work as required. Contractors or companies are encouraged to apply. Proposals are due by, TUESDAY, JANUARY 3, 2023.

Background:

The Uptown Whittier Improvement Association (UWIA) is a public benefit corporation whose primary function is to administer the Uptown Whittier Community Benefit Improvement District (CBD). The UWIA has a contract with the City of Whittier to administer the revenues for this assessment district. The special benefit services funded by this CBD may include maintaining cleanliness and order in the public rights of way, improving district identity, creating, updating, and running the website, facilitating district events, serving the corporations' administrative needs, and advocating on behalf of the area's property owners, business owners and residents. The Uptown Whittier CBD is a mandatory assessment district that funds special benefits or services over and above those currently provided by the City of Whittier. The CBD includes all property owners within the boundaries of the attached map. The function of the CBD is also one of an advocacy organization which seeks to improve the overall appearance, building/commercial mix, and public space improvements within the district.

UPTOWN WHITTIER IMPROVEMENT ASSOCIATION

c/o GM Properties □ 13305 Penn Street, Suite 200 □ Whittier, CA 90602
P (562) 697-5000 □ F (562) 693-2126
info@uwia.org □ www.uwia.org



The expectations for the contract for services for this position include:

Skills and Experience:

- Plan, organize, direct, and coordinate the work of large, multifunctional organizations representing the entire spectrum of District governance operations and services as directed by the Board of Directors (BOD);
- Work with public benefit, non-profit corporation Board of Directors, standing Committees and task forces;
- General understanding of assessment district law and Proposition 218 special benefit requirements;
- Prior experience working with a district management corporation;
- Work independently and efficiently without direct supervision;
- Establish and maintain effective working relationships with elected/appointed officials as well as with subordinates and representatives of other governmental units and civic groups, as well as and Board members from area associations, chambers, and non-profit organizations;
- Ability to evaluate a continuous array of fiscal, budgetary, administrative and technical problems and recommendations for their solution;
- Ability to effectively communicate with stakeholders (property owners, business owners and residents);
- Ability to write and maintain records of the UWIA;
- Knowledge of basic accounting principles;
- Knowledge of basic property management;
- Knowledge of maintenance of the public rights of way;
- Proficient computer and business e-mail skills;
Proficient understanding of the public records and public notice requirements of the Brown Act;
- Identify and pursue successful funding sources outside of the District assessments as determined by the Board of Directors;
- Prior experience working with property owners and business owners in commercial districts.

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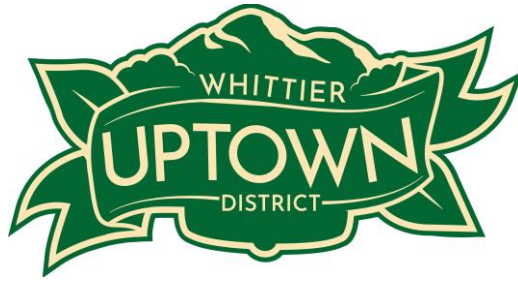
Expectations of the selected contractor or company:

I. IMPLEMENTATION OF SERVICES:

- Maintain a highly visible role in the community, with an emphasis on key partnerships and relationship building to benefit the UWIA, including but not limited to, property owners within the District, new and existing businesses, individual sponsors/donors, corporate and other business support, private foundations, and service clubs.
- Implement and maintain the Strategic Partnership Plan, as outlined by the proper committee chair, which includes key community partnerships, relationships with the media, sponsorships, publications and press releases designed to positively promote the UWIA to the community.
- Maintain the district brand by using UWIA brand materials in communications sent on behalf of the UWIA.
- Have a thorough knowledge and understanding of the Brown Act requirements; including preparing and posting any public notices & RFPs, as required.
- Implement and maintain a comprehensive plan for development/fundraising for the UWIA. This may include, but not limited to an annual campaign for special projects, financial appeals and financial gift solicitation as recommended by the relevant committee /task force.
- Develop, promote, and implement the UWIA business incentive programs and work to attract new businesses to the area.
- Help, research, organize, and coordinate special events designed to attract consumers to the shopping district, to improve community awareness and to promote district development as directed.
- Oversee the administration of a well-managed database for sponsorships and donations for major projects within the district including the standard and accurate maintenance of records, correspondences, and project notes related to the major projects.
- Have awareness of all the necessary contracts or city services to maintain a safe and clean environment within the district, including, but not limited to, sanitation, landscape maintenance, ambassadors, security or any MOUs entered into by the Board of Directors.

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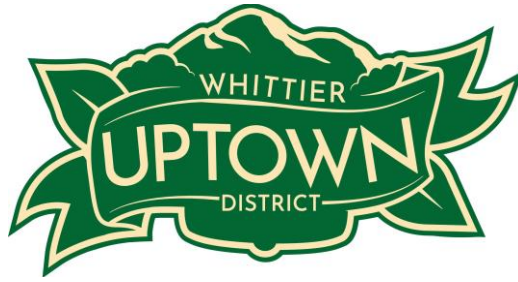
II. **CORPORATE ORGANIZATIONAL SUPPORT**

UWIA Board meeting clerical, administrative and organizational support

- Attend all UWIA Board of Directors meetings, committee meetings, and task force meetings, including preparing all necessary UWIA packets for the aforementioned meetings, completing other assigned tasks for these meetings, as well as the posting the said agendas in compliance with the Brown Act and City of Whittier open meeting provision requirements;
- Attend all UWIA Board, Standing Committee and Task Force meetings;
- Help direct and manage UWIA Board discussions;
- Prepare and correct all minutes and reports for accuracy;
- Maintain all corporate meeting records consistent with the Brown Act provisions;
- Oversee and monitor the annual election of UWIA Board members;
- Keep a roster of attendance for all UWIA Board members to ensure compliance with the bylaw's attendance requirements;
- Prepare any and all reports, including the annual report to the UWIA Board of Directors and the City;
- Handle all mailings as required by the Management and Disbursement Agreement and bylaws;
- Obtain and maintain a broad understanding of all documents pertaining to the UWIA including but not limited to the Management and Disbursement Agreement, bylaws, vendor agreements and committee and board meeting minutes;
- Schedule meeting venues or, if available, provide meeting space for Board and/ or committee meetings.
- Facilitate all annual reviews of all vendors and District Manager.

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III. **GENERAL ADMINISTRATION**

Fiscal

- Compile the annual UWIA budget from committee-developed budgets and present to the Treasurer for recommendation to the Board of Directors for review and approval;
- Provide bookkeeping services including recording of revenue, payments to vendors, preparing bank reconciliations, and basic accounting;
- Maintain accounting records through trial balance, and produces financial reports for the Board of Directors;
- Monitor actual expenses in comparison to budget and report results and forecasts at monthly Board meetings;
- Reconcile revenues received to assessment amounts calculated by parcel and report results to Board of Directors;
- Provide financial and related information to independent accountants which support preparation of annual financial statements, regulatory tax filings, and an independent review;
- Prepare annual reports to City in compliance with Management and Disbursement Agreement;
- Support the Board of Directors' development of the annual budget and implements the budget as approved by the Board;
- Monitor Committee budgets to ensure they are in alignment with projections.

Supervisory

- Oversee maintenance and other services vendors
- Oversee and direct any student interns

Office

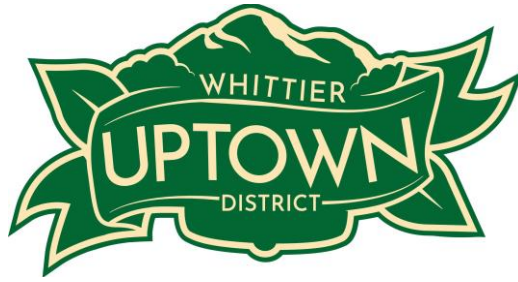
- Ensure public accessibility to records, minutes, and financial reports as required by the Brown Act

IV. **OTHER:**

Other duties as assigned by the UWIA Executive Committee, Board of Directors, standing committees, and any other UWIA task force.

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V. **Pay:**

The UWIA offers a competitive compensation for the District Manager position which will be based on experience, qualifications, and performance.

VI. **TERM:**

The agreement period is for one year, renewable for up to two additional one-year terms. Agreement can be terminated by either party with 30-day written notice.

VII. **DUE DATE:**

The Uptown Whittier Improvement Association reserves the right to accept, negotiate, reject, or propose amendments to any and all proposals submitted. 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 Whittier. We reserve the right to reject all applicants as well as determine that we will not fill this position.

For any questions regarding this RFP, please call or email Paul White, Task Force Chair.
Phone: 562-305-5432
Email: paul@whiteemerson.com

Please email the following items to paul@whiteemerson.com:

- I. Introduction, Resume & Relevant Background
- II. Background of Your Company
- III. Proposed Services
- IV. Proposed Fee
- V. No Less than 3 References and/or Letters of Recommendation.

Include in the subject line: UWIA DISTRICT MANAGER APPLICATION

Due date: TUESDAY, JANUARY 3, 2023

The Uptown Whittier Improvement Association is an Affirmative Action, Equal Opportunity employer and does not discriminate against employees or applicants because of race, religion, creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex gender, gender identity, gender expression, age, or sexual orientation, or any other characteristics protected by State and Federal law.

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