



Proposal

# Downtown Upper Marlboro Economic Development Support

SUBMITTED BY FOURTH ECONOMY FOR THE TOWN OF UPPER MARLBORO

JULY 1, 2022



A Steer Company

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[www.fourtheconomy.com](http://www.fourtheconomy.com)

July 1, 2022

Kyle Snyder, Town Administrator  
Town of Upper Marlboro  
P.O. Box 280  
Upper Marlboro MD 20773

Dear Mr. Snyder,

On behalf of Fourth Economy, I am pleased to present this proposal in response to the Request for Proposals Downtown Upper Marlboro Economic Development Firm RFP # UM 2022-01. We applaud your efforts to bring in outside expertise to work as a collaborative partner in your planning and implementation.

As we read the RFP we were excited as it aligns so well with the capabilities of our multi-disciplinary firm and the direct and ongoing experiences that we have with two long-standing clients. Since 2018 we have been providing ongoing economic development support for Greater Newport, RI and Allegheny Together (Allegheny County, PA). We have provided more details in the Experience section of our proposal and we think you will see why we believe we can be a strong partner in this work.

Fourth Economy is a growing national strategy firm focused on community and economic development and headquartered in Pittsburgh, PA. Our team of economic development practitioners, nonprofit leaders, and tier one researchers works remotely from locations across the country, including New Orleans, LA, Lawrence, KS, Miami, FL, and Philadelphia, PA

In the following proposal, we have described our capabilities and capacity as a firm. While we have highlighted key components of our approach and experience within similar scopes of work, we want to stress that we are a creative and innovative firm. We welcome the opportunity to design a scope of work that is right sized for this community, noting challenges, opportunities, and realities of the work. We also note that, with significant federal funding resources pouring into communities, we are finding new opportunities to build momentum. If given the opportunity, we will bring a nimble and flexible approach to this scope of work.

With thanks for your time and consideration,

Rich Overmoyer,  
President & CEO





# TABLE OF CONTENTS

<b>About Fourth Economy.....</b>	<b>01</b>
Project Profiles.....	02
Our Team .....	03
<b>Project Approach .....</b>	<b>03</b>
<b>Timeline and Budget .....</b>	<b>10</b>
<b>Resumes .....</b>	<b>11</b>

Fourth Economy is a mission-driven consulting group that seeks to equip change agents with the tools they need to build better communities and stronger economies.

Our experience in working on hundreds of projects informs our approach and guides us on where to begin with each client engagement. We recognize that each engagement requires a tailored and iterative process. We strive to become partners with our clients and understand their needs and aspirations.

We blend both quantitative and qualitative inputs at every point in the consulting process, developing realistic recommendations that can be easily understood and readily implemented.

## What Sets Us Apart?

Fourth Economy has assembled a team of experts who have worked in economic development agencies, industry, non-profit organizations, and tier-one research institutions.

Our team works at the intersection of diverse systems, from community to economic development, from transportation to real estate development, and from legacy industry to entrepreneurial ecosystems. We use our experience in economic development to frame environmental, social, and cultural issues in a context that resonates with investors and public policy leaders. This is demonstrated through our award winning approach to helping communities leverage their quality of place assets to change their economic and demographic paths.

Our team serves as connectors in the fourth economy, bringing together the creative energy of individuals to make new ideas and plans happen, creating lasting results for our clients.

## A Steer Company



A Steer Company

Steer is an employee-owned consultancy with twenty-one offices across North America, Latin America, UK, Europe, and India. Since 1978, the firm has provided pioneering

planning, design, and advisory services to government and business – with a particular focus on projects that develop cities, infrastructure, and transportation. Fourth Economy's partnership with Steer compliments Steer's global economic development offering, allowing us to offer a comprehensive approach that embraces people, skills, enterprise, infrastructure, mobility, and innovation.

## Project Profiles

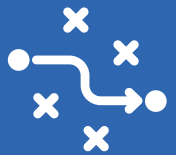
Fourth Economy works to advance economies at the local, regional, state, and national levels. For this proposal, we've highlighted previous engagements that highlight our work in areas relevant to this project.

Our **VISION** is a world where people are empowered to be co-creators of a sustainable economy that works for everyone

Our **VALUES** include:

### Intentionality

We value thoughtful, personal approaches that are tailored to each unique engagement and centered around creating impact.



### Inclusivity

We are passionate about creating a culture that prioritizes diversity, respect, and accessibility for our team members and clients.



### Creativity

We embed exploration into our team culture and client work. We are energized by venturing down new pathways to uncover innovative strategies.



### Collaboration

We utilize people-centered practices to build trust and foster authentic relationships that lead to co-created solutions.



### Curiosity

We approach our work with openness. We are passionate about using research, analysis, and lived experiences to deepen our knowledge and find new ways to improve and grow.



## PROJECT PROFILE

# Connect Greater Newport

*Newport Chamber of Commerce*

Greater Newport is comprised of nine communities within Newport County, as well as neighboring Bristol County. However, despite their close proximity and interdependent economies, these communities have not had a history of collaboration. Furthermore, none of these communities had dedicated economic development staff, aside from limited capacity at the City of Newport. As a result, a group of leaders formed a steering committee, recognizing the need for a shared vision and collaboration to support the growth of their economy and established the Greater Newport Chamber of Commerce, one of Rhode Island's largest business advocacy organizations.

The Chamber was formed to enhance the business, civic and economic vitality of Newport County and greater Rhode Island, and to leverage the region's core assets to find solutions in the areas that matter most to businesses and the community: quality jobs, quality growth and quality of life. In 2018, the Chamber retained Fourth Economy Consulting to create and manage the implementation of a five-year strategic plan for this new initiative.

## OUR APPROACH

Our team performs data analysis, research, and interviews. We work with a Steering Committee first to develop a strategic plan focused on: adding capacity for local economic development; marketing the region's business opportunities; retaining and attracting talent; and supporting and leveraging existing industries and since implementing and updating that strategy.

## THE RESULTS

We began the process with a traditional business calling program as our highest priority; through that and our other work in the region, workforce housing emerged as a key barrier to their economic success. Addressing this spurred the creation of new partnerships and creative strategies, including a regional housing symposium. Broadband access, reliability, and affordability is also an issue that we are working to enhance in the region.

Other initiatives that our team has implemented thus far include creating the Connect Greater Newport website, promoting opportunities in the region to 30,000 visitors at the Newport Folk Fest, and orchestrating annual Business Walks that have included over 100 businesses in the region. Most notably, we secured the buy-in and support of the region's municipalities and business leaders, who have renewed their investment in the initiative.

Throughout the pandemic we have supported economic recovery efforts including grant writing, initiative development and analysis to support community decision-making. As conditions have improved we are engaged in a focus on workforce housing and remote worker attraction.



## PROJECT TYPE

Ongoing Economic  
Development Support

## SCALE

Regional

## CLIENT TYPE

Chamber of Commerce

## REFERENCE

**Erin Donovan-Boyle**

Executive Director

(401) 847-1608

Erin@NewportChamber.com

NewportChamber.com

**LEARN MORE**



# Allegheny Together Technical Assistance Provider

*Allegheny County Economic Development*

Allegheny County Economic Development manages business retention, expansion, and attraction for the 129 municipalities in Allegheny County, excluding Pittsburgh. Its Allegheny Together program focuses on traditional business districts in Allegheny County and endeavors to encourage well-planned, well-designed and geographically-focused investment while respecting communities' unique history, character, and built environment.

Municipalities within Allegheny County that were hit hard when the steel industry left the region in the 1970s and '80s, and have not seen as robust a recovery as the City of Pittsburgh. The downtown business districts in the County have great foundations, but many have seen disinvestment. Through this five year project, Fourth Economy Consulting utilizes community organization and data-driven planning as a way to direct public investment, spur private investment, and revitalize these communities.

## OUR APPROACH

Fourth Economy was selected in 2019 to bring a holistic set of services to the Allegheny Together initiative. Communities apply to the program and accepted applicants are led through a facilitated strategic planning process, utilizing data analysis, community engagement, and an urban design review. Through this process, priorities are established, which are then addressed through technical assistance.

The consultant team, with support from evolve environment and architecture, and additional County partners, convenes groups of stakeholders, conducts comprehensive data analysis about the communities and their business districts, listens for insights into where to focus, and supports priorities toward implementation. In addition to individual community engagement, the consultant team hosts an annual summit to share best practices, creating a mechanism for peer support for all municipalities across the County.

Each community receives a slate of technical assistance based on the strategic planning process including business district planning, business attraction and retention, mainstreet organization planning, funding support identification, and actionable next steps to identify ongoing support.

## THE RESULTS

The first round of main street strategic plans launched in late 2019, and to-date this program has served nine communities within Allegheny County. Metrics such as investment and business starts are being tracked to understand the impact of the program and efforts around streetscape improvements, business district marketing and encouraging new business investments within each community are underway.

RFP # UM 2022-01



## PROJECT TYPE

Ongoing Economic Development Support

## SCALE

Region/County

## CLIENT TYPE

Government

## REFERENCE

**Dan Bish**

Business Development Manager

Allegheny County Economic Development

Chatham One, Suite 900

112 Washington Place

Pittsburgh, PA 15219

Phone: 412-350-1034

[dan.bish@alleghenycounty.us](mailto:dan.bish@alleghenycounty.us)

**LEARN MORE**

## PROJECT PROFILE

# Economic Development Plan

*York County Economic Alliance*

York County Economic Alliance (YCEA) was created in 2012 as it grew out of York County's chamber and economic development organizations. YCEA drives economic growth in York County, Pennsylvania by leveraging regional collaboration to create sustainable prosperity.

Fourth Economy and YCEA kicked off a 9-month planning process to create a five year Economic Action Plan that would guide investments in York County through 2025.

In March, as the local economic impacts of the global pandemic set in, our work pivoted to develop an assessment of impacts to the local economy to support the community's economic response and recovery actions. Due to the pivot, our team developed a short term recovery plan in addition to the resilience-focused 5-year strategy. In early 2021 we further advanced analysis regarding childcare, housing, and broadband related issues. This work helped inform the County's allocation of over \$14 million in federal COVID-19 funds for business relief, over \$4 million of CARES Act funding for tourism, cultural, arts, workforce, and social services, and \$5 million for broadband improvements.

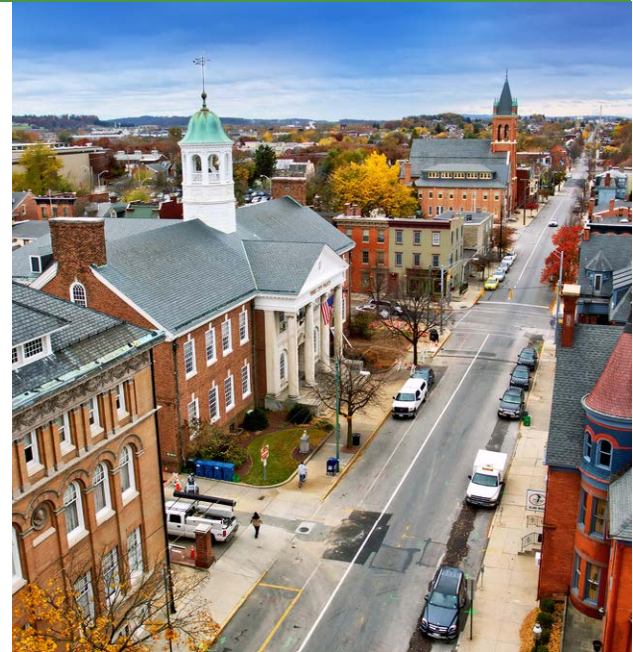
## OUR APPROACH

With the help of a 25 member Steering Committee and Co-chairs, Fourth Economy engaged a broad coalition of stakeholders that represent all corners of York County, including young people, African American residents, Hispanic and Latinx residents, low income residents, and rural, urban, and suburban residents. Community outreach was especially important to this project given the large geographic footprint of the county and cultural differences that exist throughout. This high level of engagement helped ensure that the resulting strategies and recommendations were built by the community, reflecting their desires, hopes, and dreams for York County's future.

## THE RESULTS

The final plan was voted for adoption by both the City Council and Planning Commission in February of 2021. The recommendations in the plan outline action steps, lead organizations, and additional partners that will be critical for implementation in the coming years. The community has formed an Implementation Committee to help support and account for progress made toward the goals outlined in the 10-year plan, and will update metrics, goals, and tactics as needed as time progresses.

RFP # UM 2022-01



## PROJECT TYPE

Economic Development Strategy

## SCALE

County

## CLIENT TYPE

Economic Development  
Organization

## REFERENCE

**Silas Chamberlin**

Vice President, Economic &  
Community Development  
York County Economic Alliance

144 Roosevelt Avenue  
York, PA 17401

[SChamberlin@yceapa.org](mailto:SChamberlin@yceapa.org)

**VIEW THE REPORT**

# Our Team

Short introductions to our proposed team members are below, resumes have been included at the end of this proposal.



## Rich Overmoyer

### *Advisor*

Rich founded Fourth Economy in 2010 and since then has been leading the charge to help clients translate complex ideas and data into solutions for their communities. He is creative, thoughtful, and entrepreneurial, and uses his own experiences as a guide in his work to connect people who share similar ideas and values. He strongly believes in honesty, respect, and in creating true partnerships with clients.



## Carly Horne

### *Engagement Lead*

Carly is an entrepreneurial spirit who believes in the power of storytelling as a tool for placemaking and community building. With experience in business strategy and finance, she utilizes both an analytical and creative approach to problem solving. Innately curious, she enjoys organizing complex ideas into actionable insights.



## Maya Haptas

### *Project Manager*

Maya brings a passion for community-based economic development to her work and has developed a nuanced understanding of the built environment. She is adept at connecting a wide range of stakeholders to help them implement creative solutions within their local communities. She has served on the Board of Directors for both Preservation Pittsburgh and the Union Project, and is currently Board Vice-Chair of The Maxo Vanka Murals in Millvale.



## Evan Wise

### *Research and Analysis Lead*

As an analytics consultant, Evan combines his passion for community development and his love for data to understand the world around him. He believes lived experiences, history, and rigorous data analysis are essential in building equitable communities. His passion for community development and urban planning led him to study and work in Philadelphia, which he still calls home.

# Our Approach

The following information describes our plan for engaging with the Town of Upper Marlboro and providing economic development support services. Our proposed approach is organized around the following activities:

- Engaging the Community
- Performing an Economic and Community Analysis
- Performing a Place Analysis
- Providing planning support
- Delivering Actionable Recommendations
- Identifying funding and implementation support

While we have a proven approach to these types of engagements, we also recognize that to be successful, we must be open to adapting the process to meet identified needs and opportunities. We will ensure proactive communication with the Town project manager throughout the process



## Project Management

Our team will begin the process by facilitating a Project Kickoff Meeting where we will work with you to review and refine the proposed approach, discuss key milestones and deliverables, and establish a shared understanding of roles and responsibilities. Fourth Economy utilizes a combination of bi-weekly client check-in calls and a shared project management system ([www.teamwork.com](http://www.teamwork.com)) to ensure transparency throughout the process.

## Scope of Work

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### Engage Stakeholders

A community vision for an equitable economic future requires the input and eventual support of a wide range of stakeholders. The Fourth Economy team uses a unique approach to engaging stakeholders during our ecosystem analysis work. The focus of our engagement is to accomplish three goals that we think are critical for the implementation of a plan:

- **Engage leaders throughout the process** to allow them to build the knowledge base and confidence to move from ideas to action and to become champions for implementation.
- **Listen to diverse voices** in order to develop a holistic understanding and identify a shared vision.
- **Consistently report back and follow up** with participants of surveys and focus groups to close the loop of engagement, and provide opportunities for the public to check in with the project's process.

We aim to make the process of planning exciting by engaging stakeholders in a way that gives them all a role to play in the creation of a better, more equitable future.

At a minimum, through our partnership with Upper Marlboro will engage three groups:

1. Advisory Committee
2. Town Meetings
3. Interviews

## Advisory Committee

An Advisory Committee should be composed of those representatives who will be critical to supporting analysis, engagement, and strategy development by serving as a core leadership group and sounding board. Fourth Economy will work with you to identify appropriate members, establish clear roles and responsibilities through the execution of a signed "job description," and facilitate bi-monthly meetings.

### Town Meetings

Fourth Economy expects to participate in Town Meetings throughout our partnership. As noted in the response to our questions this will include a minimum of two work sessions and two public sessions. Since these are going to be conducted in a virtual environment we will support additional meetings as appropriate.

### Interviews

The Fourth Economy team believes interviews serve as a useful tool to establish a baseline understanding and build initial support. We will work with leadership from the Town of Upper Marlboro, and the Steering Committee to determine the most appropriate stakeholders to interview (approximately 20), but assume that it will include:

- **Advisory Committee Members** to understand the history, culture, context, and an initial understanding of the community and perceived priorities
- **Business Leaders** to understand their lived experiences, expectations, opportunities, and challenges within the local ecosystem
- **Public Sector Leaders** to understand existing strategies, tools, and mechanisms for support
- **Community Leaders** who will be critical to the implementation of future strategies to support and accelerate the growth of the community
- **"Owners" of Previous Programs and Plans** to understand what has already been implemented, what should be continued, and lessons learned from prior processes
- **Program Funders and Philanthropy** to understand current funding priorities, actively supported initiatives, and the impact of investments made to date.

These engagement activities will guide our support of the ten-year planning process as well as the recommendations that we will make regarding economic development opportunities.

## Economic and Community Analysis

### Labor market and demographics

There is no single recipe for economic success, however, we have found that there are five critical attributes related to economic competitiveness that support vibrant and sustainable communities: Investment, Talent, Sustainability, Place, and Diversity. Fourth Economy employs this economic competitiveness framework to conduct a broad scan of data and trends to diagnose the economic conditions, challenges, and opportunities for the community. We believe that communities cannot succeed if they focus too narrowly on one or two specific goals or needs. It is important to monitor how all the systems of the community function interactively. This framework allows us to get an initial scan of what is working and what is not.

The Project Manager will work with the client to identify specific areas where analysis is desired. This may result from identified issues, emerging concerns, a particular focus due to programmatic or other drivers etc. Our standard analysis includes the following:



**Talent:** a skilled workforce, with access to education that prepares residents to participate in the local economy



**Place:** an active and affordable community with high levels of civic engagement and a variety of quality of life assets

Talent and Place indicators are widely available and comparable from community to community, whereas the indicators for Diversity, Sustainability and Investment require more effort and have more local variation in the data sources and availability. The snapshot we develop for the baseline understanding provides some basic insights, but more time and effort are required to understand the conditions and drivers related to diversity, sustainability and investment.



**Diversity** an equitable community, where diverse economic activity is reflective of a diverse population participate in the local economy



**Sustainability:** a resilient community and economy with diverse industries, sustainable infrastructure, and a healthy population



**Investment:** a productive regional economy with active businesses that have access to the capital, markets, and workforce they need to grow

Fourth Economy also examines economic and demographic indicators that help to define the current trends and conditions in a region (MSA or other definition), and understand how they compare to other similar areas. Some indicators can be examined at any geography, but more detailed analysis is possible in terms of industry sectors and occupational classes at the county and metropolitan level. We look at these to identify opportunities for our client communities like Upper Marlboro.

*Local and Regional Trends:  
Example Indicators*

- Population Trends (most recent 10 years)
- Age Distribution
- Median Household Income
- Poverty
- Race/Ethnicity (for key indicators)
- Owner/Renter Housing Cost Burden

*Drivers of Regional Growth:  
Example Indicators*

- Job Trends (most recent 10 years)
- Top Employment Sectors (Employees and Location Quotient)
- Employment by Occupation
- Unemployment
- Wages by Industry

After an internal review of the analysis, Fourth Economy will prepare a memo of the findings that will be shared with the client/Advisory Committee to develop priorities for issues that require further discussion and/or analysis..

## Findings Presentation

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Fourth Economy will develop a presentation that summarizes our analysis, including all charts and data with short narratives in a slide deck format. It will also include an overall summary of the assets and challenges related to core project challenges and/or the five critical dimensions, and whether the Town and region is trending positively or negatively.

### *Place analysis*

Fourth Economy will engage in a series of reviews and analyses to better understand the business operating environment within Upper Marlboro. This will include:

**Analyze existing land use regulations and policies.** Providing an external perspective informed by the interviews noted previously will allow us to assess what works and what can be enhanced.

**Evaluate existing traffic patterns and make recommendations.** We will specifically focus on increasing the pedestrian friendliness of walking to Main Street from residential areas and other current or planned commercial centers. We utilize a mix of data, such as aerial mapping and traffic counts, with interviews (noted previously), as well as observations, to determine where there are opportunities to increase pedestrian friendliness, particularly through wayfinding signage, and also help to increase Upper Marlboro's walk and bike scores.

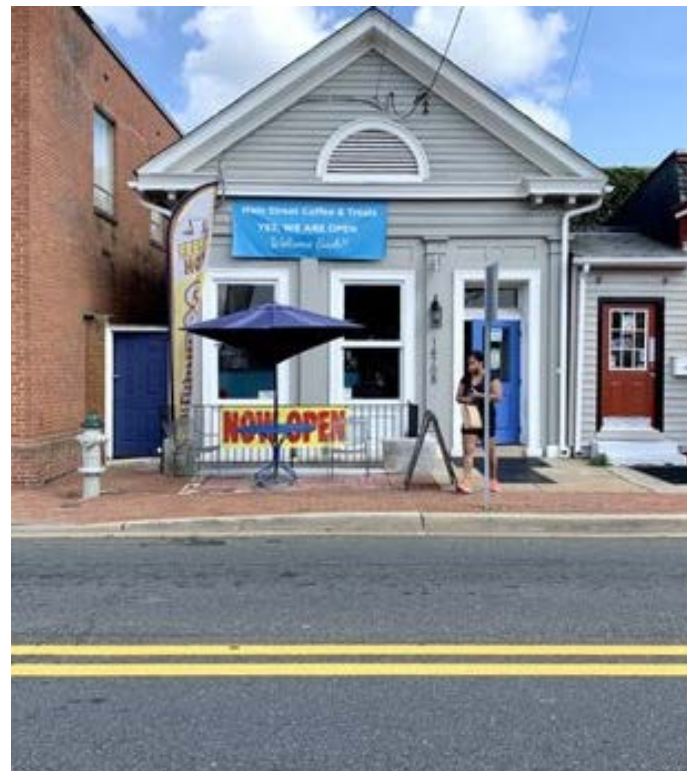
**Evaluate existing parking and make recommendations for future needs.** This should include implementation strategies for enhancing and expanding downtown parking. In the communities we work in, perceived parking deficits are a common deterrent to people visiting downtown. A parking analysis will be conducted that will both identify opportunities and match them with existing and future demand for parking. This will also help the city clearly communicate to residents and visitors about the location and availability of parking opportunities.

**Identify public space improvements.** Public space improvements are critical to increasing pedestrian connectivity as well as serving as a visual representation of the downtown, even before a branding strategy is implemented. We will provide specific recommendations for public space improvements such as trees and greenery, lighting, and other enhancements that also increase public safety, both real and perceived.

**Identify strategies to enhance downtown gateways, commercial centers, and create a visual connection between areas via branding.**

Branded wayfinding is a powerful tool to create connections in downtowns. We will identify key themes that should be utilized in a branding strategy as well as make recommendations for the locations of gateway and wayfinding signage. This will improve walkability and help by connecting multiple retail nodes.

**Identify ways to improve Downtown Upper Marlboro's walk and bike scores.** The development of wayfinding recommendations and increased connectivity due to signage, as well as public space improvements all have the potential to increase Downtown Upper Marlboro's walk and bike scores. Additionally, increased retail attraction through our planning support will have a positive impact on this metric.





## Planning support

Fourth Economy will provide planning support for various activities in the community. This will include:

- **Assist the Town in completing its 10-year Vision Plan that is currently underway** - we envision this to include an initial kick off meeting, review of materials and then the development of a work plan to define where we can best support this planning.
- **Review and support the Town's Building Improvement Program with the Sustainable Communities Working Group** - similar to the process noted above we will meet with this working group, review materials and develop a work plan
- **Create business retention and attraction strategies including identifying specific business types to target** - Fourth Economy will work with the Town to define the strategies to effectively support business retention and attraction. In our work in Newport this has included both the development of attraction materials, targeted outreach and the execution of an annual Business Walk that brings together elected officials, business support staff and other leaders to interview a large cohort of businesses during a particular time period. We will develop recommendations and strategies in direct response to what is found during these activities.
- **Identify methods to encourage and incentivize investment in commercial properties by area property owners** - As we get to know the community we will begin to develop recommendations regarding ways to encourage additional investment. We have performed similar work in both large communities and block-by-block areas.
- **Assist the Town with its designation as a Main Street Affiliate and assist with developing a business group and possible Main Street Manager.** Our work would ensure Upper Marlboro is well-poised to become designated through the Main Street Maryland Program as an Affiliate through the creation of an engaged business group that would be tasked with implementing action items related to Main Street America's Four Point Approach as well as prioritizing Clean, Safe, and Green. As the group matures, we would take them through an exercise utilizing our Organizational Business Matrix tool to investigate the formation of a more formal business entity that could result in hiring staff such as a Main Street Manager.

## Actionable recommendations

Fourth Economy will develop a portfolio of recommended strategies and then work with the Town to prioritize those to pursue based on both human and financial capacity. We would envision this to at first include an annual work plan that identifies activities for the Town staff, partners and the consulting team. The defined activities will be broken down by quarterly tasks with milestones defined.

As noted in the RFP we will work to develop strategies associated with environmental tourism and the outdoor recreation economy. We are currently engaged in outdoor economy work in York and Pittsburgh Pennsylvania and have completed similar recommendation development as part of our typical larger economic strategy work.

With all of our work we are clear to not simply hand our clients a document that says "someone should go do x things to improve the economy" as this approach creates documents that fill shelves. Instead, we work to prioritize a set of actions strategies and provide clients with the answers to the key questions: who, what, when, how, the cost, the impact, and more. In our work in Greater Newport this has often included identifying needs that we can help draw in funding for and at times support implementation.

## Deliverables

Fourth Economy will within the first nine months deliver a phased implementation plan that defines what actions the Town should take, where financial and/or human capital support may come from, and the rationale behind the recommendation.

We will provide a lightly-designed document that includes our findings and recommendations. This will be provided in the form of slides to allow Town representatives to brief partners and use the information for funding pursuits.

Fourth Economy will also provide a set of marketing resources that will be discussed with the Town team. We have in-house capabilities to produce key messaging that builds on authentic assets, brand samples, tag line, infographics and other materials. We will consider the personas including business visitors, local residents and tourists.

# Timeline and Budget

Month	1	2	3	4	5	6	7	8	9	10	Hours	Cost
<b>Engage Stakeholders</b>												
Advisory Committee		●		●		●		●		●	36	\$6,480
Town Meetings					●				●		16	\$2,480
Interviews	●	●	●								24	\$3,400
<b>Economic and Community Analysis</b>												
Labor market and demographics		●	●	●							40	\$5,200
Place Analysis - including:												
Land use regulations				●	●						14	\$1,945
Traffic patterns				●	●						18	\$2,815
Parking analysis and recommendations				●	●						30	\$4,745
Public space					●	●					24	\$3,840
Walk and bike score enhancements					●	●					12	\$1,820
<b>Planning Support</b>												
10-year plan (timing determined by client)											26	\$4,640
Sustainable communities working group (timing determined by client)											22	\$3,620
Business retention and attraction strategies			●	●	●						26	\$4,640
Main Street designation support (timing determined by client)											26	\$4,640
<b>Actionable Recommendations</b>												
Portfolio of strategies							●	●	●		20	\$4,320
Specific strategies to advance first								●	●	●	10	\$2,160
Funding support identification									●	●	16	\$3,460
Materials Development								●	●	●	36	\$4,860
<b>Project Management/Travel</b>												
Bi-weekly client calls	●	●	●	●	●	●	●	●	●	●	24	\$4,200
<b>Labor Subtotal</b>											<b>396</b>	<b>\$65,065</b>
<b>Expenses</b>												<b>\$1,500</b>
<b>Travel</b>												<b>\$2,700</b>
<b>Total Estimated Fixed Cost Not to Exceed</b>												<b>\$73,465</b>

# Resumes

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# RICH OVERMOYER

PRESIDENT & CEO

## EDUCATION

**University of Pittsburgh**  
Graduate School of Public and  
International Affairs  
Pittsburgh, PA  
M.A., Public Policy & Management

**University of Pittsburgh**  
Pittsburgh, PA  
B.A., Political Science &  
English Writing

## PRIOR EXPERIENCE

**PA Department of Community  
and Economic Development**  
Deputy Secretary, Technology  
Investment  
Harrisburg, PA

**PA Department of Community  
and Economic Development**  
Director, Office of Policy and  
Technology Investment  
Harrisburg, PA

**Pennsylvania Department of  
Public Welfare**  
Executive Policy Specialist  
Harrisburg, PA

## AREAS OF EXPERTISE

- Regional and Statewide Planning
- Economic Development
- Stakeholder Facilitation
- Strategic Planning
- Investable Story Development
- Entrepreneurship and Innovation-based Economic Development
- Partnership Development
- Program Design and Implementation
- Public Policy

## PROJECT EXAMPLES



### CONNECT GREATER NEWPORT

*Greater Newport Area Chamber of Commerce*

Connect Greater Newport (CGN) is the economic development division of the Greater Newport Chamber of Commerce. CGN was launched in 2018 to lead a public private partnership with resources from Newport and Bristol counties with a mission to support the growth of the region's existing businesses and to serve as a resource to attract new companies. Rich has served as an advisor and consultant to CGN assisting with a Strategic Development Plan, COVID-19 recovery planning, and continues to support efforts including broadband expansion, housing policy, and business attraction/retention strategies.



### ALLEGHENY TOGETHER TECHNICAL ASSISTANCE PROVIDER

*Allegheny County Economic Development*

Allegheny County Economic Development manages business retention, expansion, and attraction for the 129 municipalities in Allegheny County, excluding Pittsburgh. Its Allegheny Together program focuses on traditional business districts in Allegheny County and endeavors to encourage well-planned, well-designed and geographically-focused investment while respecting communities' unique history, character, and built environment. Fourth Economy was selected in 2019 to bring a holistic set of services to the Allegheny Together initiative. Communities apply to the program and accepted applicants are led through a facilitated strategic planning process, utilizing data analysis, community engagement, and an urban design review. Through this process, priorities are established, which are then addressed through technical assistance.



### ECONOMIC DEVELOPMENT PLAN

*York County Economic Alliance*

In November of 2019 Fourth Economy and YCEA kicked off a 9-month planning process to create a five year Economic Action Plan that would guide investments in York County through 2025. In March 2020, as the local economic impacts of the global pandemic set in, Rich and his team pivoted to develop an assessment of impacts to the local economy to support the community's economic response and recovery actions. Due to the pivot, our team developed a short term recovery plan in addition to the resilience-focused 5-year strategy. In early 2021 we further advanced analysis regarding childcare, housing, and broadband related issues. The recommendations in the plan outline action steps, lead organizations, and additional partners that will be critical for implementation in the coming years.



# MAYA HAPTAS

## SENIOR CONSULTANT, MAIN STREETS

### EDUCATION

**Cornell University**

Department of City & Regional Planning  
Ithaca, NY  
M.A. in Historic Preservation Planning

**Rutgers University**

School of Public Affairs and Administration  
Certificate in Business District Executive Management

**Bard College**

Division of Social Studies  
Annandale, NY  
B.A. in American Studies

### PRIOR EXPERIENCE

**Lawrenceville Corporation**

Business District Manager  
Pittsburgh, PA

**City of Pittsburgh**

Nighttime Economy Manager  
Pittsburgh, PA

**NEXTpittsburgh**

City Design Editor  
Pittsburgh, PA

**American Institute of Architects**

Associate Director  
Pittsburgh, PA

### AREAS OF EXPERTISE

- Economic Development
- Small Business Development
- Project Management
- Entrepreneurship
- Public-Private Partnerships
- Nonprofit fundraising
- Grantwriting
- Community Engagement
- Community Development
- Marketing & Communications

### PROJECT EXAMPLES



#### ALLEGHENY TOGETHER

*Allegheny County Economic Development*

Allegheny Together is a five year program designed to attract and retain new business to the county, by invigorating traditional “Main Street” business districts via community visioning, strategic technical assistance, and focused commercial revitalization projects. Maya is a Community Lead, engaging with borough leadership and convening stakeholders to assist with the action planning process.



#### PITTSBURGH SOCIABLE CITY PLAN

*City of Pittsburgh, PA*

As Nighttime Economy Manager, Maya implemented the Pittsburgh Sociable City Plan in order to develop a safe and vibrant hospitality sector in the City of Pittsburgh. Maya coordinated policies and resources to address public safety, enforcement, and crowd management issues; facilitated citywide campaigns to educate citizens and businesses about issues related to the nighttime economy; and served as a liaison between nightlife businesses, local government, and other stakeholders.



#### BUSINESS DISTRICT DEVELOPMENT

*Lawrenceville Corporation*

Maya was responsible for small business development as well as the implementation of project-based strategies and initiatives to address emerging neighborhood community development issues. Maya led business recruitment and retention for the neighborhood, managing two designated Main Street business districts including four years of successful funding applications to the PA Department of Community and Economic Development through the Pittsburgh Urban Redevelopment Authority. Funding applications involved data-driven narratives, work plans, and development of reporting mechanisms.



# CARLY HORNE

CONSULTANT, COMMUNITY & ECONOMIC DEVELOPMENT

## PROJECT EXAMPLES

### EDUCATION

**John Carroll University**  
University Heights, Ohio  
B.S., Business Administration

### PRIOR EXPERIENCE

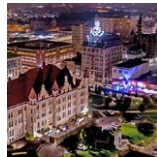
**Boys Hope Girls Hope of  
Pittsburgh, Inc.**  
Finance Associate  
Pittsburgh, PA

**Street Lark**  
Founder  
Pittsburgh, PA

**American Eagle Outfitters, Inc.**  
Senior Financial Analyst  
Pittsburgh, PA

### AREAS OF EXPERTISE

- Data Analysis & Reporting
- Small Business & Corporate Strategy
- Entrepreneurship
- Project Management
- Budget Development & Oversight



#### STRATEGIC ECONOMIC DEVELOPMENT PLAN

*City of Scranton*

Following decades of population decline and reduced tax base, the City of Scranton was seeking a catalytic strategic economic development plan to present a vision for the city that is forward-looking, actionable, and immediately implementable. Over the course of six months, the Fourth Economy team led a strategic planning process that included in-depth economic analysis, robust community engagement, ideation and visioning processes, surveying, and strategy development. As part of her engagement work, Carly reviewed economic baseline data and led one-on-one interviews with local leaders and residents. She also developed a community survey and organized community engagement workshops (build sessions). Carly supported project management activities, providing analysis and developing review materials for the Advisory Committee and the community at large in order to advance overall project goals.



#### IMAGINE BERKS STRATEGIC ECONOMIC DEVELOPMENT PLAN

*Berks County*

Berks County is located in Southeastern Pennsylvania, south of Allentown and west of Philadelphia. The county features rural and agricultural lands, including Amish and Mennonite communities, and an urban center, the city of Reading with a growing Hispanic population. Fourth Economy lead the development of an Economic Action Plan which included engaging the community, performing an economic analysis, defining priority areas, developing implementable plans, and providing an action plan and success dashboard. Carly supported analysis by conducting a prior plan review and analysis of economic baseline data and held one-on-one interviews with local leaders and residents to collect qualitative data. Carly also supported engagement and project management efforts to ensure successful outcomes.



#### NON-PROFIT OPERATIONS AND ACCOUNTING

*Boys Hope Girls Hope Of Pittsburgh*

Carly led the operations and accounting functions at Boys Hope Girls Hope of Pittsburgh, a non-profit that provides education and support for young people in need. She created operational efficiencies and established strong financial management practices. During her time with the organization, she identified and implemented administrative cost savings initiatives and cash flow planning processes.





# EVAN WISE

CONSULTANT, ANALYTICS

## EDUCATION

### RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY

New Brunswick, NJ  
Master of City and Regional Planning

### TEMPLE UNIVERSITY

Philadelphia, PA  
Bachelor of Science in Community Development

## PRIOR EXPERIENCE

### PolicyMap

Data Analyst  
Philadelphia, PA

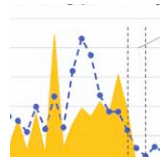
### Reinvestment Fund

Policy Solutions Intern  
Philadelphia, PA

## AREAS OF EXPERTISE

- Data Analysis
- Community Development
- Economic Development
- Public Policy
- Data Management

## PROJECT EXAMPLES



### DATA ANALYSIS

#### *PolicyMap*

Evan managed hundreds of existing datasets on the PolicyMap platform as a Data Analyst. A significant part of his role involved vetting potential data sources. Evan has an eye for good data management, which aided in his ability to maintain and update vast amounts of variables. He enhanced his ability to see use cases for new datasets to inform business development better. He accomplished this using SQL, QGIS, and Python.



### DATA ANALYSIS

#### *PolicyMap*

As a Data Analyst, Evan created custom datasets for clients in addition to new datasets for the central platform. In his role, he pieced together various data sources to create one or more measurements. He has the ability to draw from multiple sources as well as historical contexts to craft narratives around datasets, notably in the areas of housing, health, and demographics. His work has been used by countless organizations across the United States.



### RESEARCH

#### *Reinvestment Fund*

During his internship, he performed research and analysis on topics ranging from childcare supply and demand to modeling lead remediation in Philadelphia homes. He participated in survey development, stakeholder interviews, and data validation. His analysis allowed policymakers to understand issues in their communities to allocate resources. He honed his data analysis skills in this role by becoming fluent in ArcGIS and SQL.



 **FOURTH**  
**ECONOMY**  
A Steer Company

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