



**ADDENDUM NO. 1**

**TO THAT CERTAIN DETAILED REQUEST FOR PROPOSAL FOR ECONOMIC DEVELOPMENT CONSULTING SERVICES**

**Addendum Date: September 9<sup>th</sup> , 2024**

The following changes, additions, clarifications and/or amendments are made to the Request for Proposals as of the Addendum Date. All capitalized terms not defined herein shall have the meanings ascribed to them in the Request for Proposals (“RFP”).

Note: This document is intended for informational purposes only. Any changes to the RFP must occur through a separate published addendum. Invest Atlanta received the following inquiries with respect to the RFP. For the benefit of all potential respondents, Invest Atlanta now elects to publish each timely submitted inquiry, edited for clarity, along with Invest Atlanta’s response thereto. In the event of a conflict between previously released information and the information contained herein, the latter shall control.

**Q & A Responses**

|                                                                                           |                                                                |
|-------------------------------------------------------------------------------------------|----------------------------------------------------------------|
| <b>RFP Number: RFP-ADA-20242208</b>                                                       | <b>RFP Title: Economic Development Consulting Services</b>     |
| Requesting Entity: Invest Atlanta                                                         | Date: 9/09/2024                                                |
| Issuing Officer/Procurement Manager:<br>Lazerick Russell                                  | RFP Initially Posted to Internet: August 22 <sup>nd</sup> 2024 |
| eMail Address: <a href="mailto:lrussell@investatlanta.com">lrussell@investatlanta.com</a> | Telephone: 404 609 3224 ext 3224                               |

**QUESTIONS SUBMITTED TO INVEST ATLANTA ON OR PRIOR TO 5:00 P.M., September 3<sup>rd</sup>, 2024:**

| #  | Questions                                | Answers                                                                                                                                                                                                                |
|----|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Is there a budget range for the project? | There has not been a specific budget allocated for this project. Please be advised, that all Respondents should respond with competitive pricing and should not assume that interviews and/or negotiations will occur. |

| #  | Questions                                                                                                                                                                   | Answers                                                                                                                                                                                                  |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2. | How is the budget structured? Is there a portion that is allocated to the initial deliverable (the strategy itself) and another allocated to implementation support?        | The budget is intended to be structured as proposed in Exhibit B Fee Proposal. Please propose alternative milestone schedules and/or budget plans.                                                       |
| 3. | Are you looking for executable strategies for Invest Atlanta to perform or are you looking for other actions for other organizations to perform as well?                    | Invest Atlanta expects executable strategies and action plans to be focused on Invest Atlanta. Actions for other organizations to execute independently are not expected to be included in the strategy. |
| 4. | Are the SWOT Analysis and Five Forces Analysis deliverables focused on Invest Atlanta specifically, or the City of Atlanta as a whole?                                      | The City of Atlanta as a whole.                                                                                                                                                                          |
| 5. | Are we able to see a list of attendees for the Informational Session conducted on 8/29?                                                                                     | Yes, Please see attached spreadsheet titled "Informational Session Attendance Sheet.xls"                                                                                                                 |
| 6. | Could you please comment on the level of in-person versus virtual engagement you anticipate for Objective 3: Strategic Collaboration and Stakeholder Engagement?            | Invest Atlanta anticipates that the early stages would be predominantly in-person and move to virtual based as needed.                                                                                   |
| 7. | Is your team open to a consultant proposing an alternative type of analysis to the Five Force analysis indicated in Objective 1: Strengthen Economic Resilience and Growth? | Yes. At a minimum, a Five Force analysis or similar type of analysis shall be provided.                                                                                                                  |
| 8. | Will potential respondents be able to access a record of the details shared during the Informational Session?                                                               | Yes, please see attached presentation.                                                                                                                                                                   |
| 9. | Can a link to resumes be included in the mandatory scorecard worksheet, or must the information be copied and pasted into the document?                                     | Please submit both a link and an additional attachment                                                                                                                                                   |

| #   | Questions                                                                                                                                                                                                   | Answers                                                                                                                                                                                                                                                                                         |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10. | What is the expectation around engaging the steering committee? Is this group intended only to receive milestone updates, or will they have more hands-on interest in project work as it's being performed? | The steering committee will guide the strategic direction and deliverables. There will be a phased approach with the steering committee. We expect significant engagement on the front-end which will taper through the process to milestone updates.                                           |
| 11. | Can you confirm the study area for this project?                                                                                                                                                            | The City of Atlanta is the focus, but should take into consideration the Metro region                                                                                                                                                                                                           |
| 12. | Was IA happy with the previous planning process? What areas do you hope to improve?                                                                                                                         | Invest Atlanta was very happy with the prior strategy. The strategy was easy to consume and read. In addition, the strategy was succinct and provided a visual that all stakeholders could align on.                                                                                            |
| 13. | Has IA made significant progress toward goals outlined in the previous 5-year plan?                                                                                                                         | Please visit the link below to Invest Atlanta's Data and Insights page on progress towards the current economic goals. See link for a summary and the attached table for current progress (at end of document)<br><a href="#">Invest Atlanta Impact &amp; Insights</a>                          |
| 14. | Has the Steering Committee already been formed for the project? Who is represented on that committee?                                                                                                       | Portions of the Steering Committee have already been identified. However, final participating members will be defined with the most responsive and responsible Respondent.                                                                                                                      |
| 15. | Can IA provide office space for the consultant?                                                                                                                                                             | No                                                                                                                                                                                                                                                                                              |
| 16. | Will IA be available to support engagement activities (e.g., contacts, scheduling, venues, etc)?                                                                                                            | Invest Atlanta will collaborate with the consultant on existing programmatic activities. Please define the type of support you would like Invest Atlanta to provide. Support will be defined with the apparent successful Respondent once the specific engagement activities have been defined. |
| 17. | Can you share what challenges IA has faced with the current toolkit?                                                                                                                                        | Broad challenges have been communicated in the Introduction of the RFP. Please see the 5 <sup>th</sup> paragraph within the Background and Objectives section of the Introduction.                                                                                                              |

| #   | Questions                                                                                                                                                                 | Answers                                                                                                                                                                                                                                                                      |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18. | When was the last Industry Cluster study completed for the city and/or region?                                                                                            | The last industry cluster was completed during the previous ED strategy.                                                                                                                                                                                                     |
| 19. | A 6–9-month planning process was mentioned in the pre-bid, but the RFP states 9-12 months. Can you confirm preferred timeline for the planning project?                   | The minimum deliverables are expected to be provided in 9-12 months. The length in time of the planning process is dependent on the Respondent’s proposed approach and methodology for achieving the Scope of Work.                                                          |
| 20. | What level of consulting do you expect post-planning for implementation and progress tracking?                                                                            | Invest Atlanta expects a minimal level of engagement/consulting to occur post implementation/after deliverables have been provided.                                                                                                                                          |
| 21. | How much on-site time to you expect from the consultant team?                                                                                                             | That is unknown at this time and heavily depends on the amount of information required to be gathered within the Respondent’s proposed approach and methodology.                                                                                                             |
| 22. | What is IA’s vision for community, partner, and board engagement?                                                                                                         | Please see the Mayor’s Moving ATL Forward plan.                                                                                                                                                                                                                              |
| 23. | Are there already identified dates for board convening that we should consider when developing an engagement plan?                                                        | We will define the dates as we move through the process. The minimum deliverables are expected to be provided in 9-12 months. The length in time of the planning process is dependent on the Respondent’s proposed approach and methodology for achieving the Scope of Work. |
| 24. | Is there a scoring weight for MBE, FBE, SBE, and/or SDB vendors? What is that scoring weight?                                                                             | No                                                                                                                                                                                                                                                                           |
| 25. | Who will make up the proposal review committee?                                                                                                                           | The review committee will be a combination of subject matter experts and Economic Development Department leadership.                                                                                                                                                         |
| 26. | What is the preferred schedule for Board of Directors meetings, organizational meetings, and document sessions? Do you expect these to take place in person or virtually? | Board takes place on the second to last Thursday of every month. These meetings can be attended in person or virtually.                                                                                                                                                      |

| #   | Questions                                                                                                                                                                                                                                                                            | Answers                                                                                                                                                                                                                                                                  |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 27. | Is it appropriate to offer incentives to underrepresented populations to encourage participation in engagement activities?                                                                                                                                                           | Invest Atlanta is not able to provide financial incentives to any group to participate in its programs.                                                                                                                                                                  |
| 28. | Who will be the main point of contact for the project?                                                                                                                                                                                                                               | This will be defined with the most responsive and responsible bidder.                                                                                                                                                                                                    |
| 29. | Do you anticipate the need for multi-lingual facilitation? What are the most prominent spoken languages expected?                                                                                                                                                                    | Invest Atlanta expects responses from firms that are well-versed on the demographics and make-up of the Atlanta community. Georgia has a very diverse population. Some of the most common languages spoken in Atlanta, are English, Spanish, Chinese, Korean and French. |
| 30. | What geographic scope would you like us to use in our data analysis of industry and other trends? E.g. the City of Atlanta, Metro Atlanta, or a combination of the two where appropriate?                                                                                            | The geographic scope for the data analysis of industry and other trends should include Metro Atlanta, at a minimum. However, the City of Atlanta is the overall focus for the strategy.                                                                                  |
| 31. | When soliciting public input, do you envision trying to capture perspectives from Atlanta residents and businesses in general, e.g. through broadly circulated surveys or public forums, or more targeted input sessions with key stakeholders and regional partners?                | Please propose the most appropriate method, based on your expertise, to accomplish the objectives in the Scope of Work                                                                                                                                                   |
| 32. | Do we need to submit answers to the Mandatory Requirements as a separate attachment?                                                                                                                                                                                                 | Yes                                                                                                                                                                                                                                                                      |
| 33. | May we submit resumes as a separate attachment?                                                                                                                                                                                                                                      | Yes                                                                                                                                                                                                                                                                      |
| 34. | In Section G, the RFP notes that “Invest Atlanta encourages all Respondents to promote opportunities for diverse businesses, including Minority Business Enterprises (“MBE”), Female Business Enterprises (“FBE”), and Small Business Enterprises (“SBE”) to compete for business as | No                                                                                                                                                                                                                                                                       |

| #   | Questions                                                                                                                                                                                                               | Answers                                                                                                                                                                                                                                                    |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     | subcontractors and/or suppliers.” Does Invest Atlanta have a specific percentage threshold for total project fee/scope they would like to see provided by these types of businesses, and if so, how much?               |                                                                                                                                                                                                                                                            |
| 35. | Does Invest Atlanta have a specific timeline in mind for presentations and final deliverables, or would you prefer that the consultant team propose what we feel would be appropriate?                                  | As indicated in Section III Scope of Work, all deliverables shall be provided within a 9-12 month timeframe. If the Respondent, would like to propose an alternative timeline, please provide the details in the proposal.                                 |
| 36. | Does Invest Atlanta have a specific budget or cost range in mind for this effort, inclusive of all consultant costs (including travel, etc.)?                                                                           | Please see response to question #1.                                                                                                                                                                                                                        |
| 37. | The RFP calls for a “comprehensive Five Force Analysis”; can you please say more about where to use these?                                                                                                              | The Five Force Analysis, at a minimum, should be focused on Metro Atlanta. However, the strategy is intended to address the City of Atlanta as a whole.                                                                                                    |
| 38. | The RFP mentions a contract duration of two years but submission of deliverables within 9-12 months of project commencement. What work is expected, if any, between deliverable submission and the end of the contract? | Invest Atlanta expects a minimal amount of work to be conducted during this period. The majority of the work will consist of progress checks and any additional advisory services addressing any adjustments or changes to the Scope of Work deliverables. |

Invest Atlanta  
Procurement  
Manager:  
Lazerick Russell

# Request For Proposals for Economic Development Consulting Svcs

# Welcome and Introductions



*Welcome!*



# Agenda

- **Welcome and Introductions**
  - Meeting Notes
- **Purpose of Bidder's Conference**
- **Review of Solicitation Documents**
  - Overview of eRFP Sections
  - *Completing the Mandatory Requirements*
  - *Completing the Mandatory Scored Requirements*
  - *Attachments to Include*
- **Review Schedule of Events**
- **Questions**

# Meeting Notes



This meeting is being attended in person



A copy of this presentation is available to participants upon request. Email request to [russell@investatlanta.com](mailto:russell@investatlanta.com)



Questions will be officially answered within a consolidated response following the conference



When speaking, please speak loud enough for everyone to hear, state your name, company, then ask question(s)



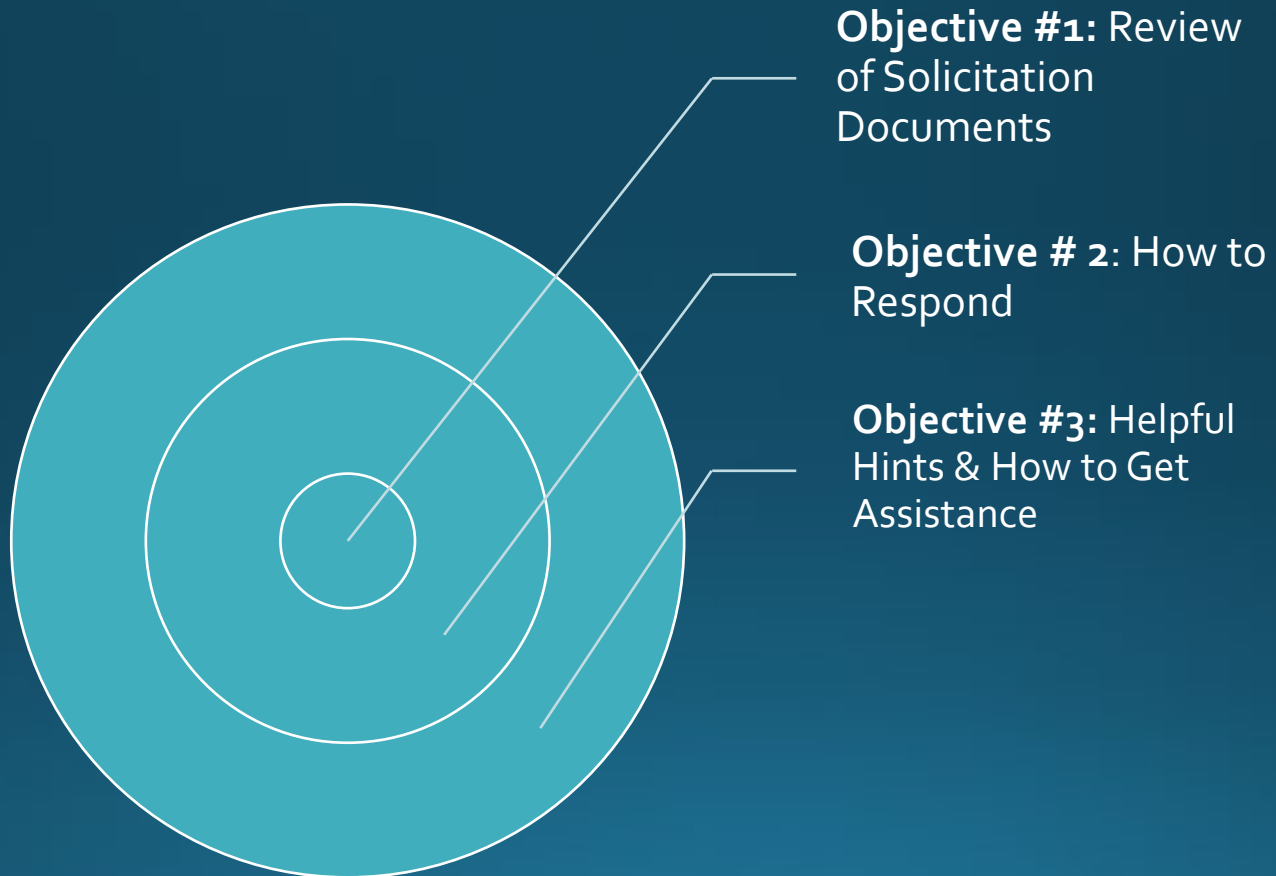
Respect the person talking



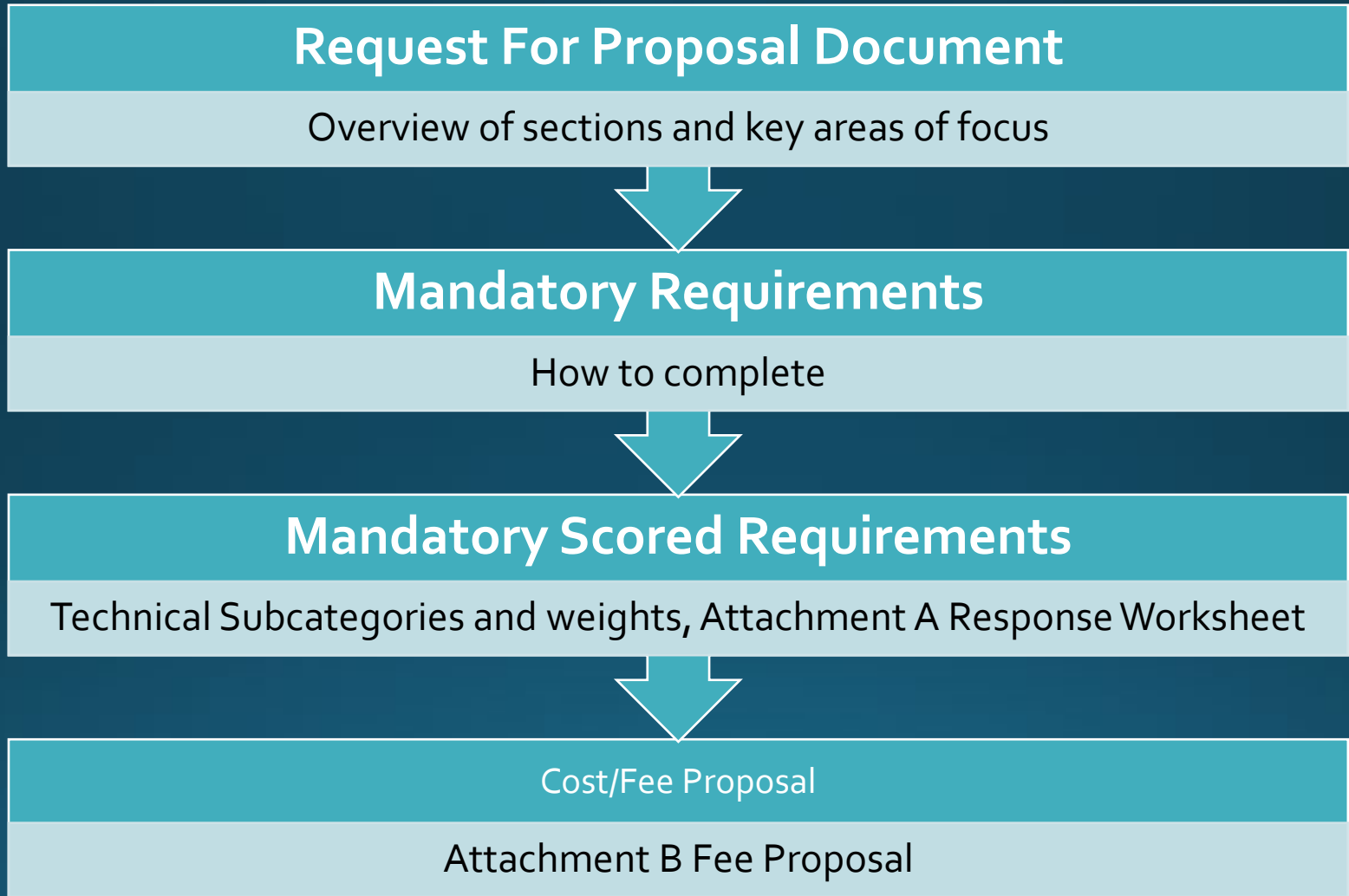
Please keep side conversations to a minimum and within your teams.

# Purpose:

**Purpose of Bidder's Conference:** This Conference is designed to inform Suppliers about the solicitation documents and the solicitation process, with 3 main objectives in mind



# Review of Key Solicitation Documents:



# Economic Development Svcs RFP

## Section 1: Introduction:

Purpose & Intent, Background & Main Objectives, Historical context for services, Broad challenges

## Section 2: Timeline of Events and Submission Instructions

Restrictions on Communications, Submitting Questions Preparing Responses, Submitting Responses, Schedule of Events, Open Records Act.

## Section 3: Scope of Services

Desired Outcomes, **Obj. 1:** Strengthen Economic Resilience and Growth, **Obj. 2:** Enhance Economic Mobility and Inclusivity, **Obj. 3:** Optimize Strategic Collaboration and Stakeholder Engagement, **Obj. 4:** Evaluate and Improve Tools & Practices, **Obj. 5:** Develop Metrics-Driven Implementation Plan, General Business Requirements

## Section 4: Technical Requirements

Mandatory Requirements (Yes/No), Mandatory Scored Requirements (evaluated criteria), Additional Requirements & Forms

## Section 5: Cost Requirements/Preliminary Offer:

Rules for Fee Proposal, Attachment B Fee Proposal

## Section 6: Evaluation Criteria and Selection process

How the solicitation will be evaluated and awarded, Technical Evaluation, How Negotiations will be conducted (If any)

## Section 7: General Terms and Conditions:

Terms, Exceptions, etc.

# Mandatory Requirements Worksheet

1. Must Answer  
"Yes" to ALL

2. Be mindful of  
Requirements  
that require an  
uploaded  
attachment.

## MANDATORY REQUIREMENTS

To be considered responsive, responsible, and eligible for award or for selection as a qualified contractor, **Respondents must answer all questions in this section in the affirmative (with a "Yes") to pass and must be submitted as a part of your response.**

1. Does the Respondent agree to participate in all relevant meetings including Board of Directors meetings, organizational meetings, and document sessions related to the Project?

Page | 6

2. The Respondent shall at a minimum provide a SWOT analysis, 5 Forces Analysis, Toolkit assessment, economic resilience assessment and recommendations, strategic action plan, recommendations for transformative program models, economic growth and mobility strategies, value creation and value capture analyses, and a metrics-driven implementation plan with 5-7 core principles guiding decision making. **Does the Respondent agree to provide the minimum deliverables described?**
3. Respondent shall provide a framework for all consultants to facilitate and coordinate stakeholder and community engagement activities such as interviews, surveying public input, etc. **Does the Respondent agree to provide comprehensive oversight of the project, organize activities and lead all aspects of Section 3: Scope of Services to ensure orderly progression in accordance with Invest Atlanta's input and direction?**
4. Respondent shall ensure compliance with all federal, state and local regulations related to economic development and consulting services. **Does the Respondent agree to adhere to this requirement?**
5. Respondents shall have a minimum of 5 years of experience in providing economic mobility strategies with a focus on both place-based and people-based approaches. **Does the respondent confirm it has provided similar services to the scope of services provided for a minimum of 5 years?**
6. Respondents shall have at least one (1) team member that maintains an active professional license or certification related to economic development and planning. **Does the Respondent agree to provide a professionally licensed and/or certified individual to be a key contributing member to providing the Scope of Services?**
7. Respondent shall have adequate financial stability and resources to fulfill fiduciary duties. **Does the Respondent agree to provide information regarding any projects from which the Respondent was terminated as an economic development consultant for cause in the last three (3) years including the reason for the termination? (Separate attachment may be requested)**

Total Mandatory Requirements: 10

# Mandatory Scored Requirements

| Evaluation Process | Weight of Eval. Process | Evaluation Criteria                                                           | Weights of Eval. Criteria |
|--------------------|-------------------------|-------------------------------------------------------------------------------|---------------------------|
| Technical          | 70 pts                  | <i>Company and Team Qualifications</i>                                        | 30 pts                    |
|                    |                         | <i>Demonstrated Understanding of Project Objectives and Community Context</i> | 15 pts                    |
|                    |                         | <i>Proposed Approach and Methodology</i>                                      | 25 pts                    |
| Cost               | 30 pts                  | <i>Fee proposal</i>                                                           | 30 pts                    |

1. Must Answer ALL Questions
2. Be mindful of Requirements that require an uploaded attachment.

Total Mandatory Scored Requirements: 14

# Attachments to Upload

## Must Haves....

- Responses to **Mandatory Questions**
- **Cover letter (2 pg limit)**
- Completed **Exhibit A ED Mandatory Scored Worksheet**
  - Complete/Respond to ALL Questions
- Completed **Exhibit B Fee Proposal**
  
- **Certification Statement**
- **E-Verify and SAVE Affidavit**
- **Request for W9**

## Maybe/Optional...

- Redline of Contract/Contract template
- Diversity Business Certification (s)



# Cost Worksheet

## EXHIBIT B

Fees and Expenses for Economic Development Consulting Services

\*\* For evaluation purposes only, the Total Estimated Consulting Fees indicated below will be used in the calculation of fees for Economic Development Consulting Services

\*\* Please be advised that if awarded, the Proposed Fixed Fee (\$) and Hourly Rate (\$/hr) will be fixed throughout the term of the contract.

Instructions: Respondents are to complete all "Yellow/Note" colored cells. Incomplete or blank cells may result in disqualification from award.

\*\*All Respondents, at a minimum, MUST complete this tab. Respondents have the option of providing an alternative payment schedule on tab 3.

| Milestone/Outcome                                   | Description                                                                                                                                                                                                                                                                                                                                                                      | Proposed Fixed Fee (\$) |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| 1<br>Initial Assessments and Current State Analyses | This milestone has been achieved once all stakeholder interviews, surveying of public input, market research, current state assessments (i.e. SWOT analysis, Five Forces Analysis, Toolkit assessment(s), economy assessment(s) by industry, value capture analysis) have been completed and approved by Invest Atlanta                                                          |                         |
| 2<br>Strategy Recommendations Strategic Plans       | This milestone has been achieved once the Respondent has provided the requested strategy recommendations related to economic growth & mobility. Deliverables included within this milestone are, but not limited to, a strategic action plan, recommendations on transformative program models, identification of value proposition, value creation analysis and recommendations |                         |
| 3<br>Metrics-Driven Implementation Plan             | This milestone has been achieved once the Respondent has provided an approved metrics-driven implementation plan that includes key performance indicators (KPI's) and resource alignment.                                                                                                                                                                                        |                         |
| <b>Total Estimated Consulting Fee</b>               |                                                                                                                                                                                                                                                                                                                                                                                  | <b>\$0.00</b>           |

| Additional Services | Service Description | Proposal                                                                 |
|---------------------|---------------------|--------------------------------------------------------------------------|
| 1<br>2              | Progress Check ups  | Number of included progress checks after deliverables have been provided |

1. Must complete "ALL" tabs to be considered responsive.

Complete all "Yellow/Note" colored cells.

2. Consultant Fixed Fee Tab
3. Hourly Rates
4. Alt. Payment Schedule

Hourly Rates: These hourly rates will be used to calculate the costs of any additional work provided outside of, but related, to the scope of work described in the RFP.

\*\* For evaluation purposes only, the Estimated Monthly Hours and the Proposed Hourly Rate will be used as the basis for calculation of the Projected Monthly Cost and Estimated Additional Labor Costs.

\*\* Please be advised that if awarded, the proposed Hourly Rate per Role will be fixed throughout the term of the contract.

Instructions: Respondents are to complete all "Yellow/Note" colored cells. Incomplete or blank cells may result in disqualification from award.

1. Propose an hourly rate for each role on the proposed team/individuals completing the Scope of Work described in Section III of the RFP.

| Title/Role                    | Role Description                                                         | Estimated Monthly Hours | Proposed Hourly Rate | Projected Monthly Cost |
|-------------------------------|--------------------------------------------------------------------------|-------------------------|----------------------|------------------------|
| <Senior Consultant/Team Lead> | <Provide a description of this team member's or role's responsibilities> |                         |                      | \$0.00                 |
| <Junior Consultant>           | <Provide a description of this team member's or role's responsibilities> |                         |                      | \$0.00                 |
| <Policy Analyst>              | <Provide a description of this team member's or role's responsibilities> |                         |                      | \$0.00                 |
| <Data Analyst>                | <Provide a description of this team member's or role's responsibilities> |                         |                      | \$0.00                 |

| Milestone                                     | Milestone/Outcome           | Description                                                                                                                      | Proposed Fixed Fee (\$) |
|-----------------------------------------------|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| 1                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 2                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 3                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 4                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 5                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 6                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 7                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 8                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 9                                             | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 10                                            | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 11                                            | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| 12                                            | <Provide Name of Milestone> | <Provide a description of what activities will be performed and what deliverables provided and approved for this milestone to be |                         |
| <b>Total Estimated Consulting Fees (Alt.)</b> |                             |                                                                                                                                  | <b>\$0.00</b>           |

| Additional Services/Costs | Service Description | Proposal                                                                 |
|---------------------------|---------------------|--------------------------------------------------------------------------|
| 1                         | Progress Check ups  | Number of included progress checks after deliverables have been provided |
| 2                         |                     |                                                                          |
| 3                         |                     |                                                                          |
| 4                         |                     |                                                                          |
| 5                         |                     |                                                                          |
| 6                         |                     |                                                                          |
| 7                         |                     |                                                                          |

# Final Reminder

**Please DO NOT WAIT**

Until the Last Hour to Begin  
Document Submit Proposal

# Schedule of Events-The Road Ahead



Release of RFP: 8/22/2024



Site Tour & Informational Session 8/29/2024 11:00 a.m. ET

Deadline for written questions: 9/03/2024 5:00 p.m. ET

Responses to Written Questions: 9/10/2024

Responses Due/Close Date/Time: 9/23/2024 5:00 p.m. ET

Invest Atlanta Website

<https://www.investatlanta.com/about-us/invest-atlanta-rfps>

# Informational Session Attendance Sheet

| No. | Participant Name  | Title/Role                                | Company                               |
|-----|-------------------|-------------------------------------------|---------------------------------------|
| 1   | Janki Vashi       | Management Consulting Sr. Manager         | Accenture                             |
| 2   | Lakeisha Sesay    |                                           | Accenture                             |
| 3   | Sarah Richards    | Sr. Associate Economics                   | AECOM                                 |
| 4   | Eliana Pereyara   | Chief of Staff                            | Alma Advisory Group                   |
| 5   | Kevin Sanders     | Risk and Contract Director, Public Sector | Boston Consulting Group               |
| 6   | Haley Miller      |                                           | Boston Consulting Group               |
| 7   | Tony DeLisi       | ED Advisory Svcs Managing Director        | Ernst & Young LLP                     |
| 8   | Sally Wallace     |                                           | Ernst & Young LLP                     |
| 9   | Mike Daly         | Business Development Manager              | ESI econsult solutions inc.           |
| 10  | Grace Hanoian     |                                           | ESI econsult solutions inc.           |
| 11  | Mary Wong         | Founder/Principal Consultant              | EvaluCraft Global LLC                 |
| 12  | Eve Critton       | Sr. Consultant                            | Fourth Economy                        |
| 13  | Brittany Pruitt   |                                           | Guidehouse                            |
| 14  | Mia White         |                                           | Guidehouse                            |
| 15  | Bethany Miller    | Sr. ED Consultant                         | Hickey Global                         |
| 16  | Marilyn Davis     | Senior Advisor                            | HR&A Advisors, Inc.                   |
| 17  | Alex Stokes       | Principal                                 | HR&A Advisors, Inc.                   |
| 18  | Stan Wall         | Owner                                     | HR&A Advisors, Inc.                   |
| 19  | Thomas Goff       | Sr. Associate/Partner                     | Mass Economics                        |
| 20  | Tiffany Major     |                                           | Project 43 Consulting                 |
| 21  | Alfonso Syquia    | Marketing Coordinator                     | SB Friedman Development Advisors, LLC |
| 22  | Sterling Johnson  |                                           | SB Friedman Development Advisors, LLC |
| 23  | Catherine         |                                           | SB Friedman Development Advisors, LLC |
| 24  | Grace Kim         | nm.,hjk\                                  | SB Friedman Development Advisors, LLC |
| 25  | Fran Lefor Rood   |                                           | SB Friedman Development Advisors, LLC |
| 26  | Rebecca Deranian  | Proposal Writer                           | TIP Strategies                        |
| 27  | Rachel Wise       |                                           | TIP Strategies                        |
| 28  | Wendy Brewer      | Proposal Strategy Director                | TPMA Inc.                             |
| 29  | Stephanie Flatten |                                           | TPMA Inc.                             |
| 30  | Niklas Tessman    |                                           | TPMA Inc.                             |
| 31  | Anthony Kitchens  |                                           | Unknown                               |
| 32  | Teresa Munoz      | CSR                                       | Unknown                               |
| 33  | Annie Yang        |                                           | Unknown                               |
| 34  | Tiffany Major     |                                           | Unknown                               |

### Invest Atlanta Progress towards Goals (9/2024)

| #  | KPI                                                                                                | 4-YEAR TARGET   | 4 YEAR Actual   | Progress to Date (% Complete) |
|----|----------------------------------------------------------------------------------------------------|-----------------|-----------------|-------------------------------|
| 1* | \$ total capital Investment across all IA programs/initiatives (IA investment + leveraged capital) | \$4,105,497,034 | \$2,427,683,894 | 59.1%                         |
| 1a | \$ total capital Investment across all ED programs/initiatives(IA investment + leveraged capital)  | \$669,124,389   | \$906,613,487   | 135.5%                        |
| 1b | \$ total capital Investment across all CD programs/initiatives (IA investment + leveraged capital) | \$3,116,385,887 | \$1,487,790,048 | 47.7%                         |
| 1c | \$ total capital Investment via PACE program                                                       | \$312,100,000   | \$25,208,661    | 8.1%                          |
| 2  | Average net promoter score across programs (50 and higher is considered excellent)                 | 70              | 67.5            | 96.5%                         |
| 3  | Average customer satisfaction score across programs (0/5 scale)                                    | 4.3             | 4.2             | 98.3%                         |
| 5  | # people engaged via IA community outreach efforts                                                 | 43,409          | 41,038          | 94.5%                         |
| 6  | # business attracted, retained, or expanded through IA activities                                  | 125             | 112             | 89.6%                         |
| 7* | \$ invested in small businesses by IA via grants and loans                                         | \$27,132,641.58 | \$24,374,106.09 | 89.8%                         |
| 7a | \$ invested in small businesses by ED via grants and loans                                         | \$6,500,000     | \$13,218,028    | 203.4%                        |

|             |                                                                                                                                        |               |               |        |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------|--------|
| 7<br>b      | \$ invested in small businesses by CD via grants and loans                                                                             | \$10,000,000  | \$1,873,437   | 18.7%  |
| 8           | # total small businesses that received IA services, across all programs                                                                | 5,925         | 4,896         | 82.6%  |
| 9           | # hours of Formal Technical Assistance Provided to Small Businesses                                                                    | 8,008         | 8,721         | 108.9% |
| 1<br>0      | % of small businesses who receive support from IA, which are located in disinvested areas                                              | 45.1%         | 37.3%         | 82.7%  |
| 1<br>2      | # good jobs created via IA activities                                                                                                  | 7,797         | 5,623         | 72.1%  |
| 1<br>3      | # total jobs created or retained via IA activities                                                                                     | 30,978        | 18,680        | 60.3%  |
| 1<br>4      | # of low-income households supported through homeownership incentives (DPA, OOR, Anti-Displacement Tax Relief, First Mortgage Program) | 702           | 1,126         | 160.4% |
| 1<br>5      | # of affordable single-family and multifamily development housing units that receive financing from IA (both new + preserved units)    | 7,237         | 3,792         | 52.4%  |
| 1<br>6<br>* | % of capital (invested + leveraged) that goes to disinvested neighborhoods                                                             | 53.1%         | 43.8%         | 82.6%  |
| 1<br>7      | # residents served through social impact-oriented projects (AEMI)                                                                      | 10,875        | 29,134        | 267.9% |
| 1<br>8      | \$ private investment leveraged in TAD-funded projects                                                                                 | \$789,293,632 | \$319,933,436 | 40.5%  |