

**REQUEST FOR PROPOSALS**

**FOR**

**Economic Development Consulting  
Services**

**August 22<sup>nd</sup>, 2024**

**RESPONSES DUE: September 19<sup>th</sup>, 2024**



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Atlanta, GA 30303

## SECTION I INTRODUCTION

Invest Atlanta (“IA”) is soliciting competitive, sealed responses (“Responses”) from interested and qualified firms to provide strategic planning services for Atlanta’s Economic Development 4-year strategy and implementation plan. The intent and purpose of the RFP is to identify a single firm to provide strategic planning services for Atlanta’s Economic Development 4-year strategy and implementation plan. Please be advised, Respondents are encouraged to draw upon the experience of local and national experts to expand their knowledge and skills. Invest Atlanta welcomes collaborative or partnering proposals in response to this RFP.

Respondents shall be selected and determined through IA’s review of each response, considering the factors identified in this Request for Proposals (“RFP”) and any other factors that it considers relevant to serving the best interest of Invest Atlanta and its mission. Nothing in this RFP shall be construed to create any legal obligation on the part of Invest Atlanta or any respondents. Invest Atlanta reserves the right, in its sole discretion, to amend, suspend, terminate, or reissue this RFP in whole or in part, at any stage. In no event shall Invest Atlanta be liable to respondents for any cost or damages incurred in connection with the RFP process, including but not limited to, any and all costs of preparing a response to this RFP or any other costs incurred in reliance on this RFP. The respondent shall be entitled to repayment from Invest Atlanta for any costs, expenses or fees related to this RFP. All supporting documentation submitted in response to this RFP will become the property of Invest Atlanta. Respondents may also withdraw their interest in the RFP, in writing, at any point in time as more information becomes known.

### BACKGROUND & MAIN OBJECTIVES

Atlanta was founded in 1837 as the end of the Western & Atlantic railroad line (it was first named Marthasville in honor of the then-governor’s daughter, nicknamed Terminus for its rail location, and then changed soon after to Atlanta, the feminine of Atlantic -- as in the railroad). Today, the fast-growing city remains a transportation hub, not just for the country but also for the world: Hartsfield-Jackson Atlanta International Airport is the world’s busiest in daily passenger flights. Direct flights to Europe, South America, and Asia have made metro Atlanta easily accessible to the more than 1,000 international businesses that operate here and the more than 50 countries that have representation in the city through consulates, trade offices, and chambers of commerce. The city is the world headquarters for many Fortune 500 companies.

Atlanta is the capital of the southeast, a city of the future with strong ties to its past. The old in new Atlanta is the soul of the city, the heritage that enhances the quality of life in a contemporary city. In the turbulent 60’s, Atlanta was “the city too busy to hate.” And today, in the 21st Century, Atlanta is the “Hotlanta, The Hollywood of the South and the City in a Forest.”

Atlanta has experienced unprecedented growth – the official city population has almost reached 500,00 with the metro population is expected to grow to 7.9M by 2050.

Though we have a thriving, diverse business climate, the city also faces the twin challenges of income inequality and lack of housing affordability. We believe that sustainable communities grow when a region can find that positive intersection between economic and social demands supporting an economic growth strategy centered on balanced and broad economic growth and in fact, this path can be the source of a region’s continual economic vitality. Hence, we need a new Economic Development 4 Year Strategy and Implementation Plan that has an emphasis on economic mobility and empowerment to ensure the city’s economic competitiveness in the 21st century Global economy.

*“To make substantial progress in increasing economic mobility, cities, need to address the problems exhibited by existing service-delivery systems.... Cities need to move from a focus on providing services to focus on investing in systems that help people overcome challenges that keep them from realizing their economic potential.”* (Bowdler, Cisneros, Lubell 7).

The Project involves several different challenges for Respondents to overcome to ensure the successful execution of all aspects of the scope of work described below. Some of the major challenges that exist are related, but not

limited to, alignment with multiple stakeholders, coordination across multiple strategies, measuring and demonstrating impact of recommended strategic plans. Ultimately, the successful Respondent will possess a combination of project management, strategic planning, economic policy development and technological knowledge and skills necessary to navigate these challenges and achieve the main objectives described below.

**Main Objectives:**

- ✚ Create an economic development strategy (centered on economic mobility as place-based and people-based strategies) and implementation plan that will allow the city to continue to compete today and, in the future, while ensuring it is a place where all Atlantans can reach their full potential.
- ✚ Consider recommendations that include short- and long-term goals with innovative key performance metrics for the City of Atlanta to track success in implementing and collaborating with others within the next 4 years.
- ✚ Advance Atlanta's global competitiveness by growing a strong economy, building vibrant communities, and increasing economic prosperity for all Atlantans.

**DEFINITIONS**

**SECTION II  
TIMELINE OF EVENTS AND SUBMISSION INSTRUCTIONS**

**INQUIRIES AND PROCESS TIMELINE**

Only inquiries received electronically will receive a response. Do not contact any Invest Atlanta staff with any questions or comments pertaining to this RFP. All such inquiries must be delivered by 5:00 p.m., September 3<sup>rd</sup>, 2024, to the issuing officer at [EconomicMobilityRFP@investatlanta.com](mailto:EconomicMobilityRFP@investatlanta.com). Inquiries received after such a date and time will not receive a response. Invest Atlanta will publish all timely written inquiries and Invest Atlanta's responses to those inquiries as an Addendum to this RFP on Invest Atlanta's website ([www.investatlanta.com](http://www.investatlanta.com)) on or before the close of business on September 6<sup>th</sup>, 2024.

Due Date	Action Required
<b>August 22<sup>nd</sup>, 2024</b>	Release of RFP
<b>August 29<sup>th</sup>, 2024 @ 11:00am-1:00pm EST</b>	Informational Session
<b>September 3<sup>rd</sup>, 2024</b>	Written questions due to Invest Atlanta
<b>September 6<sup>th</sup>, 2024</b>	Responses to written questions posted
<b>September 19<sup>th</sup>, 2024</b>	Responses due to Invest Atlanta
<b>Week of October 7<sup>th</sup>, 2024</b>	Potential Interviews/Presentations/ Demonstrations
<b>Week of November 11<sup>th</sup>, 2024</b>	Anticipated Selection/Award

**SUBMISSION INSTRUCTIONS**

A. Responses to this Request for Quotes must be submitted in electronically no later than 5:00 p.m., September 19<sup>th</sup>, 2024, to the issuing officer at [EconomicMobilityRFP@investatlanta.com](mailto:EconomicMobilityRFP@investatlanta.com). Proposals should include all identified components (Responses to Mandatory Requirements, Mandatory Scored Requirements, Exhibit A Fee Proposal and all other requested documentation). Proposals received after the deadline time and date will not be considered.

By submitting a response to the RFP, the Respondent is acknowledging that the Respondent:

- (1) Has read the information and instructions,
- (2) Agrees to comply with the information and instructions contained herein.

From the time of release of this RFP through the conclusion of the selection process, there shall be no communication between any Respondents and/or their lobbyist or authorized/unauthorized agent(s) with any staff of the City, Invest Atlanta or the Atlanta Development Authority ("ADA"), any elected or appointed official of the City,

IA, ADA and/or their staff or financial advisor, except as provided for in the RFP, unless such communication is initiated by Invest Atlanta and is unrelated to this RFP process. Any violation of this provision by any Respondent and/or its lobbyist or authorized/unauthorized agent(s) shall be immediate grounds for disqualification for award of a contract in connection with this RFP.

The laws of the State of Georgia, including the Georgia Open Records Act, as provided in O.C.G.A §50- 18-70, et seq., require certain public records be made available for public inspection. Even though information (financial or other information) submitted by a Respondent may be marked as “confidential”, “proprietary”, etc., Invest Atlanta will make its own determination regarding what information may or may not be withheld from disclosure.

### **SECTION III SCOPE OF SERVICES**

As Atlanta continues to move forward, it is imperative that the City show how promoting economic development, economic empowerment, people based strategies, economic mobility and other components of the equity agenda can support the City’s equitable growth. Invest Atlanta is seeking to achieve the below desired outcomes.

#### **Enhance Economic Competitiveness and Growth:**

Develop innovative and competitive strategies to propel Atlanta's continued growth in jobs, investment, and international competitiveness. This includes identifying technologies like AI that can disrupt markets and recommending transformative program models to align skill sets with industry needs.

#### **Advance Economic Mobility and Inclusivity:**

Create strategies that promote economic mobility for all residents, focusing on both place-based and people-based approaches. This includes assessing the current economy by cluster, industry segmentation, and skill levels to ensure that all residents can reach their full potential, aligning with the Mayor’s agenda of creating a City of Opportunity for All.

#### **Coordinate and Integrate Strategic Initiatives:**

Ensure alignment and coordination with existing city strategies, such as the Moving ATL Forward: Economic Mobility Plan and Housing Strategy, while obtaining public input and engaging key stakeholders. This will help create a cohesive and integrated approach to economic development that supports the Mayor’s vision for a City Built for the Future and Effective and Ethical Government.

Specifically, the successful Respondent shall aim to accomplish each objective below and, at a minimum, perform the following services:

#### **OBJECTIVE 1: STRENGTHEN ECONOMIC RESILIENCE AND GROWTH**

Develop a **strategic action plan** that positions Atlanta to thrive in the face of economic shifts, natural disasters, climate change, and emerging technologies. This includes performing a **comprehensive Five Force Analysis, identifying strategic opportunities** within the new industrial economy, **and recommending innovative and competitive strategies** that propel job growth, investment, and international competitiveness.

- **Provide** an assessment of current economic strengths, weaknesses, opportunity and threats including of how the City of Atlanta fares with regards to economic resilience metrics (i.e., the ability to avoid, withstand, and recover from economic shifts, natural disasters, the impacts of climate change, etc.)
- **Identify and describe** the challenges/dysfunctions within the economic system.
- **Provide** strategies and recommendations to compete internationally.
- **Identify** technologies, including AI, that can disrupt the Atlanta market, clusters and businesses.
- **Provide** a strategic action plan that guides progress on how Atlanta is going to make progress on the Moving Atlanta Forward goals set out in the document.
- Within the new economic order, **identify** the City’s strategic opportunity within the new industrial economy and/or critical and emerging technologies (industrial, energy, climate, new technology hubs, trade).

- **Perform** a Five Force Analysis to better understand the organization and the city.

### **OBJECTIVE 2: ENHANCE ECONOMIC MOBILITY AND INCLUSIVITY**

**Design and implement transformative program models** that improve skill sets, match industry needs, and ensure that all residents benefit from economic growth. This goal includes **assessing the current economy** by industry cluster, **examining Invest Atlanta's tools and programs**, and **identifying best-in-class economic mobility strategies** that align with the Mayor's vision for a City of Opportunity for All.

- A focus on how this plan can **support** the Mayor's Moving Atlanta Forward Agenda which include: One Safe City, A City of Opportunity for All, A City Built for the Future, Effective and Ethical Government
- Based on the assessments, **recommend** transformative program models and strategy for implementation to match to improve skill sets to match needs.
- **Assess** our current economy by cluster and industry segmentation and needed skill-levels.
- **Identify** innovative, competitive strategies for economic growth and economic mobility.
- **Identify** best in class economic mobility strategies and determine their viability in Atlanta
- **Identify** how the Economic Development Department within Invest Atlanta specifically can impact economic mobility and the Mayor/City Council's goals using existing tools or identify new tools.

### **OBJECTIVE 3: OPTIMIZE STRATEGIC COLLABORATION AND STAKEHOLDER ENGAGEMENT**

**Organize a steering committee** to guide the strategic direction and deliverables of the engagement. **Facilitate collaboration with Invest Atlanta's local and regional partners, conduct stakeholder interviews, and ensure alignment with existing city strategies** like the Moving ATL Forward: Economic Mobility Plan. Public input and stakeholder engagement are key to this process.

- **Coordinate and consult** with other strategies (i.e., Moving ATL Forward: Economic Mobility Plan (2020-2025), Housing Strategy) and obtain public input.
- **Refer to other strategies** with key stakeholders and obtain public input.
- **Examine** the role of Invest Atlanta's local and regional partners and their strategies/work that impact economic mobility and how Invest Atlanta can better cooperate with these organizations.
- **Facilitate meetings** with focus groups and conduct stakeholder interviews.
- **Identify and organize a steering committee** to guide the strategic direction and interim deliverables of the year-long engagement

### **OBJECTIVE 4: EVALUATE AND IMPROVE ECONOMIC DEVELOPMENT TOOLS AND PRACTICES**

**Conduct a thorough assessment of Invest Atlanta's toolkit**, identifying gaps in services, and exploring opportunities for greater impact. This includes a **value capture and value creation analysis**, examining the role of local and regional partners, and **identifying evidence-based economic development practices** that can be adapted for Atlanta.

- **Toolkit Assessment** – Identify where there are opportunities for greater impact in community
- **Identify** opportunities to build on existing best-in-class economic development practices and illustrate pros and cons of each.
- **Identify** relevant evidence-based economic development practices/models in use nationally.
- **Identify gaps** in economic development services and related systems and recommend solutions.
- **Assess the Invest Atlanta toolkit** in terms of growth opportunities and/or a refocus on responsibilities potentially to other partners.
- **Examine** all the tools and programs at Invest Atlanta and determine whether they are reaching the full potential to support this economic mobility strategy.
- **Analysis of needs based on industry cluster targets** identified in the Economic Development Strategy and Annual Reports.

**OBJECTIVE 5: DEVELOP METRICS-DRIVEN IMPLEMENTATION PLAN**

Create a metrics-driven implementation strategy with 5-7 core principles to guide decision-making. This includes setting up KPIs to track progress, **providing customer service strategies**, and **ensuring that resources such as funding, structure, and culture are aligned to support the successful execution of the strategy**. The plan should also **focus on how to achieve the goals** outlined in the Mayor's Moving Atlanta Forward agenda, including making Atlanta a safe, opportunity-rich, future-ready, and ethically governed city.

- **Provide metrics** that can be used to track progress throughout the 4-year implementation strategy.
- **Provide** customer service strategies and KPIs
- Based on the recommendations, in so much as possible, **provide insight** into the resources, in terms of funding, structure, culture and people, needed for implementation.
- **Identify** the City of Atlanta's and the organization's value proposition including a value curve and a value capture and value creation analysis.

**At a minimum, the Respondent must provide the following deliverables for the scope of work described:**

1. SWOT Analysis concerning Invest Atlanta and the City of Atlanta's economic resilience
2. 5 Forces Analysis
3. Assessment of Atlanta's current economy by industry cluster
4. Invest Atlanta's Toolkit Assessment
5. Strategic Action Plan containing recommendations that align and support the Mayor's Moving Atlanta Forward Agenda
6. Recommendation of transformative program models
7. Economic Growth & Mobility Strategy
8. Value Creation and Value Capture Analyses
9. Metrics-Driven Implementation Plan with 5-7 core principles to guide decision-making
10. Progress checks post strategy and implementation plan (as needed)

***Please be advised the above minimum deliverables shall be delivered within nine (9) to twelve (12) months of the commencement date.***

**The term of the contract shall be for two (2) years**, subject to a satisfactory annual performance review at the sole discretion of IA.

**GENERAL BUSINESS REQUIREMENTS**

- A. Provide a Certificate of Insurance proof of insurance meeting the requirements in Exhibit A Owners Representative Insurance Requirements.

**SECTION IV  
TECHNICAL REQUIREMENTS**

The technical requirements below provide a framework of the minimum standards that must be upheld for firms providing Economic Development Strategy. Firms are encouraged to carefully review all requirements and tailor their proposals accordingly while ensuring compliance with applicable laws and regulations.

**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?

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)**
8. Respondent must agree to protect the information from unauthorized use or disclosure for as long as it remains proprietary, and refrain from using the information for any purpose other than for which it was furnished to Invest Atlanta. Prior to beginning work, the Respondent and its personnel may be required to complete and abide by confidentiality and non-disclosure agreements related to the Project. **Does the Respondent agree to comply with this requirement?**
9. Respondent shall certify that there are no known conflicts of interest and agrees to disclose any circumstances or relationships that may give the appearance of a conflict of interest as soon as the Respondent is made aware of the circumstance or relationship. **Does the Respondent agree to comply with this requirement?**
10. Respondent shall provide details on all work performed in relation to this scope of work in order to receive payment. **Does the respondent agree to comply with this requirement?**

#### **MANDATORY SCORED REQUIREMENTS**

The Respondent's technical proposal shall be structured in alignment with the framework provided below. To be considered responsive, responsible, and eligible for an award or for selection as a qualified contractor, you must answer all questions in this section. Respondents must submit responses on **Attachment A ED Mandatory Scored Worksheet**. In order to be deemed responsive and responsible, Respondent's must complete form in its entirety.

##### **A. PROPOSAL OVERVIEW AND COVER LETTER**

1. Respondents shall provide a cover letter summarizing the key points of their response. The cover letter shall be executed by an officer or employee of the firm who is authorized to commit the Respondent's resources to IA's proposed transaction. Please limit your transmittal letter to two (2) pages and provide as a separate attachment.

##### **B. COMPANY AND TEAM QUALIFICATIONS (30 PTS)**

1. **Provide** a brief history of the Respondent's firm. Responses shall, at a minimum, include the year organized, ownership, affiliated companies, and relationships.
2. **Provide** the name, job title, address, office telephone number, fax number, and email address of a primary contact person who will be responsible for the day-today contact with Invest Atlanta and any backup personnel who would be accessible if the primary contact cannot be reached. The primary contact so

identified should be responsible for making the majority of the Respondent's oral presentations, if requested.

3. **Describe** all litigation pending or taken against the Respondent or member of the Respondent's firm related to providing Owner's representative services for a commercial real estate development.
4. **Provide** the name, title, office location, phone number, e-mail address, and brief resumes (including Invest Atlanta and other state and local housing finance agency experience, as applicable) for the principal team members who will be assigned to IA's account. Include their level of responsibility and availability.
5. **Describe** the professional background of these individuals, particularly their relevant project management and construction management experience. Please designate the percentage of work for which each team member will be responsible.
6. **Describe** any memberships or certifications that the firm holds with professional organizations in the field of economic development such as, but not limited to, Certified Economic Developer (CEcD), International Economic Development Council (IEDC), American Institute of Certified Planners (AICP) Certification, Certified Economic Development Finance Professional (CEDFP), National Association of Development Organizations (NADO), National Development Council (NDC), Urban Land Institute (ULI), International City/County Management Association (ICMA).

#### **C. DEMONSTRATED UNDERSTANDING OF PROJECT OBJECTIVES & COMMUNITY CONTEXT (15 PTS)**

1. **Describe** the Respondent's experience providing the services or engaging in activities as they relate to the Scope of Services described above. Describe the Respondent's expertise in providing economic development strategies to cities similar in size. Include two (2) specific examples of strategic plans that the Respondent has provided in the past.
2. **Provide** a list of state or local economic development authorities for which the Respondent has served or currently provides services like those described in *Section III Scope of Services* above. Responses shall indicate what the current relationship is to each economic development authority.
3. **Provide** a list of five references from where work of a similar size and scope has been completed within the last ten (10) years. Include a brief description of project, size of budget for project, targeted dates of completion or substantial completion if a current project, contact name, phone number, and e-mail address for each reference.

#### **D. PROPOSED APPROACH AND METHODOLOGY (25 PTS)**

1. **Explain** your approach to Project Management, particularly in managing budgets and schedules.
2. **Describe** the proposed approach to developing the economic development strategy, including how the firm will balance place-based and people-based strategies.
3. **Provide** examples of how you have facilitated effective stakeholder communication in past projects.
4. **Outline** the methodology for conducting economic analyses, stakeholder engagement, and strategy formulation.
5. **Detail** the resources and technological capabilities that will support efficient service delivery and proactive communication. Responses, at a minimum, shall include if the Respondent provides a platform that is independently accessible to Invest Atlanta staff for project updates and reporting activities.

### **ADDITIONAL REQUIREMENTS & FORMS**

#### **E. CERTIFICATION STATEMENT**

The following shall be repeated in the Respondent's Response and signed by an individual authorized to bind the Respondent. Failure to include and provide an original signature of the certification statement may result in rejection of Response.



"I agree to abide by the conditions of this RFP and certify that all the information provided in this Response is true and correct, that I am authorized to sign this Response for the Respondent, and that the Respondent is in compliance with all requirements of the RFP."

Authorized Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

#### **F. E-VERIFY AFFIDAVIT & SAVE AFFIDAVIT**

Provide notarized proof of compliance with Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. (Appendix A) E-Verify. Respondents must comply with the Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. All services physically performed within the State of Georgia must be accompanied by proof of your registration with the E-Verify Program, as well as verification of your continuing and future participation in the E-Verify program established by the United States Department of Homeland Security. A completed E-Verify Contractor Affidavit must be submitted to Invest Atlanta (Appendix A-1). To the extent there are subcontractors working on this contract, you are responsible for obtaining a fully signed and notarized subcontractor affidavit from those firms with whom you have entered into sub-contracts (Appendix A-2). In turn, should there be second-tier subcontractors on this project, you must require the subcontractors to obtain E-Verify Affidavits from those second-tier.

#### **G. DIVERSITY, EQUITY INCLUSION POLICY**

At Invest Atlanta, economic prosperity and competitiveness in Atlanta start with equity—equitable access to opportunity and pathways to wealth creation. It is more than a goal; it is a guiding principle that drives us. We advance our work through this lens to ensure that all Atlantans are positioned to benefit from economic investments in our city, regardless of their zip code.

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 subcontractors and/or suppliers.

However, nothing herein should indicate that an MBE, FBE, or SBE may not apply and be selected independently, as MBEs, FBEs, and SBEs that meet the qualifications of this ITB are encouraged to submit their qualifications for consideration. For an MBE, FBE, or SBE to participate on the contract, said MBE, FBE, or SBE must be certified as an MBE or FBE and be registered with the City's Office of Contract Compliance M/FBE Register. SBEs must be registered with the City and are defined as businesses not 2.5 million in gross sales during the recent calendar or fiscal year.

- **City of Atlanta – Office of Contract Compliance (MBE/FBE):**  
 Jason Ingram  
 68 Mitchell St. SW, Suite 5100, Atlanta, Georgia 30303  
 Tel: 404.330.6010  
 Fax: 404.658.7359  
 email: [jingram@AtlantaGa.Gov](mailto:jingram@AtlantaGa.Gov)
- **Small Disadvantaged Business (SDB)** certification by the U.S. Small Business Administration provided they reflect certification because of minority or women-owned status.

If joint responses are permitted within this RFP, a firm selected by the Respondent to jointly respond to this RFP can only satisfy one of three categories. The same firm may not, for example, be listed for participation as an MBE organization and a SBE organization even if the level of participation exceeds each category's goal. All firms must be registered or certified prior to the submittal of the Response. A Respondent is at risk in that there may be an issue of time to certify or register if it intends to use a firm that is not certified or registered at the time the Response is submitted. Invest Atlanta is an Equal-Opportunity Employer.

## SECTION V COST REQUIREMENTS

Invest Atlanta's intent is to structure the cost format to facilitate comparison among all suppliers and foster competition to obtain the best market pricing. Consequently, Invest Atlanta requires that each Respondent's cost be in the format outlined below and within ***Attachment B Fees Proposal***. Additional alternative cost structures will not be considered. **Each Respondent is cautioned that failure to comply with the instructions listed below, submission of an incomplete offer, or submission of an offer in a different format than the one requested may result in the rejection of the Respondent's proposal.**

By submitting a response, the Respondent agrees that it has read, understood, and will abide by the following instructions/rules:

- (1) Cost proposals should be inclusive of all costs associated with the scope of services defined;
- (2) Respondent shall complete the cost worksheet in its entirety and shall not leave out any information necessary to conduct the evaluation in its entirety.
- (3) In the event there is discrepancy between the Respondent's unit price and extended price, the unit price shall govern;
- (4) The fees quoted and listed in the cost proposal shall be firm throughout the term of the resulting contract, unless otherwise noted in the RFP or contract; and
- (5) Fees quoted and listed in the cost proposal shall be valid for a period of 120 days from submittal.

Enter all information directly into pricing worksheet attachment. Enter numbers on each cost sheet in "number" (two-place decimal), not "currency" or other format unless otherwise stated. That is, omit dollar signs, commas, and any other non-essential symbols. (e.g., \$7.90 should be entered as 7.90) Prices must be in US Dollars. Enter "n/a" to indicate not available or "0" if there is no charge. Cells left blank will be interpreted as "no offer".

## SECTION VI EVALUATION CRITERIA AND SELECTION PROCESS

### SELECTION CRITERIA

The Selection Committee comprised of Invest Atlanta staff will review qualifications in accordance with the evaluation criteria set forth herein and Invest Atlanta overall objectives and policies. Proposals that are submitted in a timely manner and comply with the mandatory requirements of the RFP will be evaluated in accordance with the terms of the RFP. Any contract/purchase order resulting from this RFP will not necessarily be awarded to the vendor with the lowest price. Instead, a contract/purchase order shall be awarded/issued to the vendor whose proposal best fits the needs and objectives of Invest Atlanta.

Evaluation Process	Weight of Eval. Process	Evaluation Criteria	Weights of Eval. Criteria
<b>Technical</b>	<b>70 pts</b>	<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
<b>Cost</b>	<b>30 pts</b>	<i>Fee proposal</i>	30 pts

When evaluating proposals, Invest Atlanta reserves the right to:

- (1) Waive technicalities or irregularities in Responses at its discretion.
- (2) Accept or reject any or all Responses received because of this RFP.
- (3) Obtain information concerning all Respondents from any source.
- (4) Schedule an oral interview before the Review Committee with any or all Respondents or Respondents identified within a Competitive Range.
- (5) Select for contract negotiation or award, a Response other than that with the highest score if, in the judgment of Invest Atlanta, it shall serve the public's best interests; and
- (6) Negotiate with the successful Respondent with respect to any additional terms and conditions of the contract

Invest Atlanta may rely on all representations therein for 120 days from the date established for receipt of proposals.

#### **TECHNICAL EVALUATION**

As specified with each requirement listed in Section 4: Technical Requirements- Mandatory Requirements, the Respondent 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. To be considered responsive and eligible for an award, all mandatory requirements identified must be met.

Additionally, all requirements described within Mandatory Scored Requirements must be met and completed. The responses to the Mandatory Scored Requirements require a narrative description to be completed. The responses will be evaluated by a team, designated by Invest Atlanta, in accordance with the scoring rubric above. Specifically, the responses provided to the Mandatory Scored Requirements serve as the basis for the technical evaluation and score.

#### **COST EVALUATION AND SCORE**

Each Respondent will be allocated points based on where their respective Total Estimated Fees lie within the pool of Respondents. Specifically, the Respondent providing the lowest cost or Total Estimated Fees will be allocated the most points within the pool or deemed the most responsive.

Additionally, Invest Atlanta strives to make an award to a cost-effective Respondent and maintains a total cost of ownership perspective when evaluating costs/pricing proposals. For clarity, Invest Atlanta will use the Total Estimated Consulting Fixed Fee from Tab 1, the Estimated Additional Labor Costs from Tab 2, as the basis for assigning points and overall score.

Invest Atlanta retains the right to perform a price reasonableness analysis or exercise to validate the legitimacy of each proposal. This may include, but is not limited to, requests for additional documentation on actual costs.

#### **OVERALL COMBINED SCORE**

The Respondent's Technical Score will be combined with their respective Cost score to determine the Overall Combined Score. Respondents will be ranked based on their Overall Combined Score. A Competitive Range may be determined by identifying any natural groupings or breaks within the pool of Respondents.

After evaluating all proposals in accordance with this section, Invest Atlanta may determine that the number of most highly rated proposals that might otherwise be included in the competitive range exceeds the number at which an efficient competition can be conducted. Therefore, Invest Atlanta may limit the number of proposals in the competitive range to the greatest number that will permit efficient competition among the most highly rated proposals.

## **INTERVIEWS/PRESENTATIONS/DEMONSTRATION PROCESS**

Invest Atlanta, at its sole discretion, may ask any Respondent to make an oral presentation and/or product/ service demonstration without charge to Invest Atlanta. Invest Atlanta reserves the right to require any Respondent to demonstrate to the satisfaction of Invest Atlanta that the Respondent has the managerial, fiscal and technical capabilities to furnish Owner's Representative/ Construction Project Management Services.

The purpose of the interview/presentation/demonstration, if any, will be to meet and become familiar with the proposed project team and key personnel, understand the project approach and ability to meet the stated objectives for the project.

## **NEGOTIATIONS & BEST AND FINAL OFFERS**

Invest Atlanta may invite the top ranked Respondent(s) with a defined competitive range for negotiations. Invest Atlanta reserves the right to negotiate all elements, except legal requirements of any Respondent received.

Invest Atlanta anticipates negotiating, at a minimum, the following elements:

1. Price/Fees
2. Schedule
3. Work Plan
4. Resources

At any time prior to requesting best and final offers, Invest Atlanta may request additional information, samples, or other evidence of the Respondent's performance capabilities from any Respondent in the competitive range to better understand and evaluate the Respondent's offer. Furthermore, Invest Atlanta may request a written best and final offer from all Respondents that have a reasonable chance to be selected for award. The technical evaluation team will re-evaluate each best and final offer in accordance with the evaluation criteria defined above and may change the final technical evaluation score based upon the information submitted in the best and final offer.

## **SECTION VII GENERAL TERMS AND CONDITIONS**

All qualifications and supporting materials as well as correspondence relating to this RFP become property of Invest Atlanta when received. Any proprietary information contained in the Response should be so indicated. However, a general indication that the entire contents, or a major portion, of the proposal is proprietary will not be honored.

- A. All applicable State of Georgia and Federal laws, City and County ordinances, licenses and regulations of all agencies having jurisdiction shall apply to the Respondent(s) and the scope of services. The engagement letter with the Respondent(s), and all questions concerning the execution, validity or invalidity, capability of the parties, and the performance of the services, shall be interpreted in all respects in accordance with the laws of the State of Georgia.
- B. Professionals requiring special licenses must be licensed in the State of Georgia and shall be responsible for those portions of the work as may be required by law.
- C. No Response shall be accepted from, and no contract will be awarded to, any person, firm, or corporation that (i) is in arrears to Invest Atlanta or the City with respect to any debt, (ii) is in default with respect to any obligation to Invest Atlanta or the City, or (iii) is deemed irresponsible or unreliable by Invest Atlanta. If requested, the Respondent shall be required to submit satisfactory evidence that they have the necessary financial resources to provide the proposed services.
- D. From the date Invest Atlanta receives a Respondent's proposal through the date a contract is awarded to a Respondent, no Respondent may make substitutions, deletions, additions or other changes in the configuration of Respondent's proposal or members of Respondent's team.

**APPENDICES, ATTACHMENTS & EXHIBITS**

- Appendix A E-Verify Affidavit
- Attachment A Mandatory Scored Worksheet
- Attachment B Fees Proposal
- Exhibit A Insurance Requirements

## Appendix A

### CONTRACTOR AFFIDAVIT UNDER O.C.G.A §13-10-91(b)(1)

By executing this affidavit, the undersigned Contractor verifies its compliance with O.C.G.A. §13-10-91, et seq. (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services on behalf of Invest Atlanta: (1) has registered with; (2) is authorized to use; (3) is using; and (4) will continue to use throughout the contract period a federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicability provisions and deadlines established in the Act and the Rules.

The undersigned contractor further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to the contract with Invest Atlanta of which this affidavit is a part, the undersigned contractor will secure from such subcontractor(s) similar verification of compliance with the Act and the Rules through the subcontractor's execution of the subcontractor affidavit provided below.

The undersigned contractor further agrees to provide a copy of each such affidavit to Invest Atlanta at the time the subcontractor(s) is retained to perform such services and to maintain copies of all such affidavits for no less than five (5) years from the date provided to Invest Atlanta and otherwise maintain records of compliance with the Act and the Rules as required.

Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

\_\_\_\_\_  
Employment Eligibility Verification (E-Verify)  
User Identification Number

\_\_\_\_\_  
Date of Authorization

I hereby declare under penalty of perjury that the foregoing is true and correct.

\_\_\_\_\_  
BY: Authorized Officer or Agent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Subcontractor Name

\_\_\_\_\_  
Title of Authorized Officer or Agent of Subcontractor

\_\_\_\_\_  
Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me

This \_\_\_\_ day of \_\_\_\_\_, 201\_\_

\_\_\_\_\_  
Notary Public

My commission expires: \_\_\_\_\_

**SUBCONTRACTOR AFFIDAVIT UNDER O.C.G.A §13-10-91(b)(3)**

By executing this affidavit, the undersigned subcontractor verifies its compliance with O.C.G.A. § 13-10-91 (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services under a contract with \_\_\_\_\_ (name of contractor) on behalf of Invest Atlanta: (1) has registered with; (2) is authorized to use; (3) is using; and (4) will continue to use throughout the contract period a federal work authorization program known as E-Verify, or any subsequent replacement program, in accordance with the applicability provisions and deadlines established in the Act and the Rules.

The undersigned subcontractor further agrees that it will contract for the physical performance of services in satisfaction of the Contract only with sub-subcontractors who present an E-Verify Affidavit to the undersigned subcontractor with the information required by the Act and the Rules. The undersigned subcontractor will forward notice of the receipt of an E-Verify Affidavit from a sub-subcontractor to the Contractor within five (5) business days of receipt. If the undersigned subcontractor receives notice that a sub-subcontractor has received an E-Verify Affidavit from any other contracted sub-subcontractor, the undersigned subcontractor must forward, within five (5) business days of receipt, a copy of the notice to the Contractor.

Subcontractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

\_\_\_\_\_  
Employment Eligibility Verification (E-Verify)  
User Identification Number

\_\_\_\_\_  
Date of Authorization

I hereby declare under penalty of perjury that the foregoing is true and correct.

\_\_\_\_\_  
BY: Authorized Officer or Agent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Subcontractor Name

\_\_\_\_\_  
Title of Authorized Officer or Agent of Subcontractor

\_\_\_\_\_  
Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me  
This \_\_\_\_ day of \_\_\_\_\_, 201\_\_

\_\_\_\_\_  
Notary Public

My commission expires: \_\_\_\_\_

## **Attachment A**

**Mandatory Scored Worksheet (Use word document)**



## **Attachment B**

**Fees Proposal (Use spreadsheet)**

## **Exhibit A**

### **Owner's Representative Insurance Requirements**

#### **General Liability:**

- Limits:
  - \$1M per occurrence
  - \$2M aggregate
- Including:
  - Insurance carrier must have a minimum A.M. Best's Rating of A- or better and an A.M. Best's Financial Size Category of VIII or better.
  - The policy shall include coverage for liabilities arising out of premises, operations, independent contractors, products, completed operations, personal & advertising injury, and liability assumed under an insured contract. This insurance shall apply separately to each insured against whom a claim is made or suit is brought subject to the respective limit of liability.
  - No exclusion for abuse and molestation
  - No exclusion for Assault and Battery
  - The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured regarding ongoing and completed operations
  - Primary and Noncontributory language in favor The Atlanta Development Authority, ISAOA/ATIMA
  - Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
  - Notice of cancellation (30 days, except 10 days for nonpayment) The Atlanta Development Authority

#### **Automobile Liability:**

- Limits:
  - \$1M combined single limit regarding any auto (or hired and non-owned auto liability if the contractor does not own any autos)
- Including:
  - Insurance carrier must have a minimum A.M. Best's Rating of A- or better and an A.M. Best's Financial Size Category of VIII or better.
  - The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured
  - Primary and Noncontributory language in favor The Atlanta Development Authority, ISAOA/ATIMA
  - Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
  - Notice of cancellation (30 days, except 10 days for nonpayment) to The Atlanta Development Authority

#### **Workers Compensation and Employers Liability:**

- Limits:
  - Workers Compensation: Statutory
  - Employers Liability: \$1M/\$1M/\$1M
- Including:
  - Insurance carrier must have a minimum A.M. Best's Rating of A- or better and an A.M. Best's Financial Size Category of VIII or better.

- The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured
- Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
- Notice of cancellation (30 days, except 10 days for nonpayment) to The Atlanta Development Authority

**Umbrella / Excess Liability:**

- Limit: \$5M
- Including:
  - Insurance carrier must have a minimum A.M. Best's Rating of A- or better and an A.M. Best's Financial Size Category of VIII or better.
  - General Liability, Auto Liability and Employers Liability on the schedule of underlying coverages
  - The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured regarding ongoing and completed operations
  - Primary and Noncontributory language in favor The Atlanta Development Authority, ISAOA/ATIMA
  - Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
  - Notice of cancellation (30 days, except 10 days for nonpayment) to The Atlanta Development Authority

**Professional Liability:**

- Limits: \$1M per occurrence
- \$2M aggregate
- Including:
  - Coverage for claims brought by third parties or losses due to any breach of duty; neglect; error; misstatement; misleading statement; omission; or other acts relating to services performed.
  - The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured
  - Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
  - Notice of cancellation (30 days, except 10 days for nonpayment) to The Atlanta Development Authority

**Cyber Liability:**

- Limits: \$1M per occurrence
- \$2M aggregate
- Including:
  - The Atlanta Development Authority, ISAOA/ATIMA named as Additional Insured
  - Primary and Noncontributory language in favor The Atlanta Development Authority, ISAOA/ATIMA
  - Waiver of Subrogation in favor of The Atlanta Development Authority, ISAOA/ATIMA
  - Notice of cancellation (30 days, except 10 days for nonpayment) to The Atlanta Development Authority