EV2228 Economic Development Incentives Analysis

Kasey Krueger

05/26/2016

Contents

1. Instructions and Conditions

1. PURPOSE

Conduct a comprehensive analysis of the City of Kansas City's historic use of economic development incentives and the resulting impacts.

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2. DUE DATE FOR PROPOSALS

Proposers shall submit Proposals to the City Contact Person listed in Section 3 by 11:00 p.m. (CT) on 06/12/2016, (June 12, 2016).

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3. CITY CONTACT PERSONS

(a) General, Technical and Proposal Submission Questions
Proposers shall submit their Proposal and any general questions or issues about any aspect of this RFP to the following City Contact person:

Kerrie Tyndall
City Manager's Office
City Hall, 29th Floor
414 E. 12 th Street
Kansas City, Missouri 64106
Office: (816) 513-6539
E-mail: kerrie.tyndall@kcmo.org

Questions may also be submitted through the RFP365 online tool.

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4. DEFINITIONS

- This Request for Proposals ("RFP" or "solicitation") is an invitation by the City for Proposers to submit an offer, which may be subject to subsequent discussions and negotiations by the City and the Proposer. It is not a request for a competitive bid.
- "Proposal" means any document, submittal, interview, presentation, discussion, negotiation, and everything and anything provided in response to this RFP regardless whether the submission is an oral or written submission.
- By submitting a proposal to the City, Proposer agrees that the Proposer does not obtain any right in or expectation to a contract with the City or a vested interest or a property right in a

contract with the City regardless of the amount of time, effort and expense expended by Proposer in attempting to obtain a written executed contract with the City that complies with Section 432.070, RSMo, the City Charter and City ordinances.

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5. ESTIMATED SCHEDULE

This process will include two primary phases - the Qualifications Phase, during which firms will be evaluated, based on expertise and approach, and a preferred firm will be selected to proceed to the second phase - the Scope Development/Price Negotiation Phase. The schedule below provides estimated time frames for the major components of these two phases

These are estimated dates subject to modification by the City. Respondents will be notified of any changes to this schedule.

1. Issue RFQ/P
2. Due Date for Responses - 6/12/16
3. Pre-Submittal Teleconference - to answer questions and provide clarification on qualification requirements one (1) week prior to the close date for the RFQ/P.
4. Question Period - 2 weeks after Close.
5. Short-listed Firm Interviews Complete - Mid June 2016
6. Preferred Firm Selected - Jun 2016

Upon selection of the preferred firm, the City will issue an offer letter and schedule a kick off meeting to begin negotiation of the final scope of services and pricing with the selected firm.

1. Finalize the Scope of Services and Pricing - Early Summer 2016.
2. Project Commencement - Summer 2016
3. Required Project Completion Date - Fall 2016

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6. RFQ/P DOCUMENTS

This RFQ/P consists of the following sections:

- This RFQ/P

- Scope of Services
- Standard City Contract
- HRD Documents

7.EXAMINATION OF ALL RFQ/P DOCUMENTS AND REQUIREMENTS

- Each Proposer shall carefully examine all RFQ/P documents and thoroughly familiarize themselves with all RFQ/P requirements prior to submitting a proposal to ensure that Proposer's Proposal meets the intent of this RFQ/P.
- Before submitting a Proposal to the City, each Proposer shall be responsible for making all investigations and examinations that are necessary to ascertain any and all conditions and requirements that affect the requirements of this RFQ/P. Failure to make such investigations and examinations shall not relieve the Proposer from Proposer's obligation to comply, in every detail, with all provisions and requirements of the RFQ/P.
- By submitting a Proposal to the City, Proposer certifies that Proposer has provided the City with written notice of all ambiguities, conflicts, mistakes, errors or discrepancies that Proposer has discovered in the RFQ/P, the Proposed Contract, Scope of Services and any other document. By executing a Contract with the City, Proposer certifies that Proposer communicated to City all ambiguities, conflicts, errors or discrepancies that it has discovered in the RFQ/P, the Proposed Contract, Scope of Services and any other document and that written resolution thereof by the City as embodied in the final Contract is acceptable to Proposer.

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8. QUESTIONS AND CLARIFICATIONS ABOUT THIS RFQ/P

- Question Deadline
  - Proposers may submit written questions, request clarifications or provide notice to the appropriate City Contact person listed in Section 3 of any ambiguities, conflicts, mistakes, errors or discrepancies that Proposer has discovered in the RFQ/P, the Proposed Contract, Scope of Services and any other solicitation document at any time until one (1) week prior to the due date for proposals.
  - The City will answer all inquiries by any Proposer in writing. If any inquiry results in a change in the RFQ/P, the City will issue an Addendum and the Addendum will be on

the City's website. It is the responsibility of Proposers to check and City's website for addenda. http://www.kcmo.gov

- Questions - Post Deadline
    - If a Proposer discovers any ambiguities, conflicts, mistakes, errors or discrepancies **after the deadline for questions and clarifications or after the proposal due date**, Proposer shall immediately submit the ambiguity, conflict, mistake, error or discrepancy to the appropriate City Contact person listed in Section 3. The City, in its sole discretion, shall determine the appropriate response to any issue raised by any Proposer.

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9. SUBMISSION OF PROPOSALS
All proposal documents must be submitted in the exact order as listed in the City RFQ/P.

- The City uses RFP365 for the electronic distribution and submission of this RFQ/P's responses.
- Respondents will prepare their answers and upload completed forms in this electronic platform. Respondents can prepare responses to RFQ/P questions that include:
    - Formatted text, using the formatting options in the text editor
    - Uploaded files, including completed forms and supporting documentation. Use the *paperclip* icon in the text editor to upload a file.
    - Embedded images. Thumbnails of images can be uploaded into the text, resized, and placed using the controls through *picture frame* icon in the text editor.
    - Links to external website which are publicly available.
- Respondents using the RFP365 platform can add internal team members to help in the preparation of their responses. By clicking on the Users page through the drop-down under your name in the upper right-hand corner, you can invite team members to collaborate on responses.
- Users of this platform must have an internet connection and can user browsers including: Google Chrome, Mozilla Firefox, Apple Safari, and Microsoft Internet Explorer 9 or newer. Users on old versions of browsers which are not supported by this application will be warned at the login screen that they are using an unsupported browser. Google Chrome and Mozilla Firefox are free browsers and can be installed on the uses computer at no charge.
- Users of RFP365 can send and receive messages to the RFQ/P owner by using the messaging feature in the top-right corner of this RFQ/P screen. Messages will be responded to accordingly and an email of any message will be copied to the respondent point of contact.
- Each response can be assigned to users of the respondent's team. They can set internal due dates and manage the progress inside of the RFP365 platform.
- Only complete and approved responses can be submitted.
- Submission after the due date at midnight (Central time) is not allowed.
- Technical support for this application is available at support@rfp365.com.

10.CONTENT OF PROPOSAL

In the subsequent sections of this proposal, respondents will be required to prepare answers to various questions. These sections include:

- Business/Firm Profile and Legal Structure
- Experience
- Personnel
- Project Approach
- Sustainability
- Cost Proposal
- References
- Other Required Documents

11. EVALUATION CRITERIA

Any evaluation criteria or weighting of criteria is used by the City only as a tool to assist the City in selecting the best proposal for the City. Evaluation scores or ranks do not create any right in or expectation to a contract with the City regardless of any score or ranking given to any Proposer by the City. In other words, even if the City gives a Proposer the highest rank and highest score, the Proposer still has no expectation of a contract with the City and the City may choose to contract with any other Proposer regardless of the score or rank of the other Proposer.

Our evaluation criteria will include the following:

<u>Minimum Eligibility Criteria</u>

- Schedule. The selected firm will be required to complete this analysis by Fall 2016, and will be required to demonstrate capacity to meet required deadlines, subject to final negotiated project schedule.
- Minority Participation. Selected firms will be required to comply with City MBE/WBE policies and utilized locally certified subcontractors in fulfillment of these requirements.
- Qualifications. Teams will be evaluated on the basis of experience in performing similar projects. References will be used to assist in this evaluation.

- Understanding of project. Teams will be evaluated on the basis of how well they communicate an understanding of the research project outlined in this RFQ/P.
- Approach to project. Proposals will be evaluated on how the proposed project meets the objectives of the City and its partners and the proposer's understanding of available data and their approach for gathering the data. This includes the strength of the applicant's approach to analyzing or modeling the impact of economic development incentives.
- Quality of work. Proposals will be judged on the apparent quality of the work performed in similar situations. References will be used to determine the research team's ability to deliver the results expected.
- Personnel. Proposals will be evaluated on the personnel assigned to the project. Specific attention will be placed on personnel who have similar project experience and qualifications to perform the tasks outlined in the RFQ/P. This includes the demonstrated ability of the contractor to conduct the project within the given timeframe, based on staffing. At least one team member of any responding firm should have a minimum of 10 years individual professional experience in a leadership capacity in an economic development, public sector finance, tax accounting, economics, either economic analysis, tax analysis, real estate analysis, public policy analysis, or related field.
- Value. Proposals will be evaluated on the basis of the approach that will position the City of Kansas City to obtain results and achieve the most success within the framework identified in the proposal - ultimately providing Kansas City with a significant economic development planning tool and analysis.
- Cost. Proposals will be evaluated on the cost estimate provided in relation to the expertise and approach outlined.
- Past Experience. Proposals will be evaluated on the number of years of relevant experience, with preference towards firms having experience working with local governments, analyzing economic incentives and/or tax policy, conducting economic research, and/or analyzing real estate values. The selected firm must have past experience completing complex analysis for federal, state, or local governments, or economic development organizations serving populations of at least 100,000 residents.

Evaluation of responses to this RFQ/P and final selection of a preferred consulting team will be conducted by a Project Selection Committee comprised of representatives from various City departments and community partners engaged in daily economic development activities on behalf of the City including - City Finance, City Planning, the Office of Economic Development (a division of the City Manager's Office), the Mayor's Office, the Economic Development Corporation of Kansas City, Missouri, and staff of the Tax Increment Financing Commission and the Planned Industrial Expansion Authority, which are economic development statutory agencies of the City.

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12. INTERVIEWS

The City, in its sole discretion, may interview none, one, some or all of the Proposers who submit proposals.

13. DISCUSSIONS AND NEGOTIATIONS

The City, in its sole discretion, may do any or all of the following:

- evaluate Proposals and award a contract with or without discussions or negotiations with any or all of the Proposers;
- discuss and negotiate anything and everything with any Proposer or Proposers at any time;
- request additional information from any or all Proposers;
- request a Proposer or Proposers to submit a new Proposal;
- request one or more best and final offers from any or all Proposers;
- accept any Proposal in whole or in part;
- require a Proposer to make modifications to their initial Proposals;
- make a partial award to any or all Proposers;
- make a multiple award to any or all of Proposers;
- terminate this RFQ/P, and reissue an amended RFQ/P.

14. PROPOSAL MUST REMAIN FIRM IRREVOCABLE OFFER TO CITY FOR 6 MONTHS

- By submitting a proposal to the City, Proposer agrees that Proposer's Proposal shall constitute a firm irrevocable offer to the City that Proposer shall not withdraw or modify without the City's approval for six (6) months after the proposal due date. Proposer agrees that even if the City negotiates or makes a counter offer to Proposer on Proposer's original Proposal or any subsequent Proposal submitted by Proposer to the City, Proposer hereby grants to the City, in the City's sole discretion, the unconditional right for the City to accept Proposer's original Proposal and the City's negotiation or counter offer shall not be deemed to be a counter offer.
- After six (6) months, the City can accept any proposal or subsequent proposals from any Proposer with the consent of the Proposer at any time and regardless of the length of time that has passed from the proposal due date.

15. SELECTION

The City will select the proposal that in the City's sole judgment the City determines to be the best Proposal. Section 432.070, RSMo requires the City to have a written executed contract signed by both parties prior to anyone performing services or providing any goods, supplies, materials or equipment to the City.

The written executed contract must also comply with the City Charter and City Ordinances. This means that a proposer does not have a contract with the City until a written contract is *executed.* A contract is *executed* when all of the following have occurred: (1) the City Council authorizes the execution of a contract with the Proposer (if City Council approval is requested by City staff or is required by City Ordinance); (2) persons with actual authority to bind both the City and the Proposer execute the contract; (3) the contract is approved by the Law Department; (4) the City issues a purchase order to the Contractor with the Director of Finance's certification of availability of funds for the contract; and (5) any other required step.

A Proposer does not have a contract with the City until all the steps are completed.
If the City does not complete all required steps, there is no contract between the City and the Proposer and the City has absolutely no contractual or financial obligation to any Proposer regardless of the amount of time, effort and money spent by the Proposer responding to the RFQ/P and attempting to negotiate and obtain a contract with the City.

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16. REJECTION OF PROPOSALS

The City reserves the unconditional right to reject any or all proposals received in response to this RFQ/P at any time prior to the City executing a contract that meets the requirements of Section 432.070, RSMo, the City Charter and all applicable City Ordinances.

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17. WAIVER OF ORDINANCES, REGULATIONS AND RFQ/P REQUIREMENTS

- The City, at any time, may waive any requirements imposed in this RFQ/P or by any City regulation.
- The City may waive any requirement imposed by the City's Code of Ordinances when failure to grant the waiver will result in an increased cost to the City and the requirement waived would be waived for all Proposers for this RFQ/P and it is in the best interest of the City to grant the waiver.

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18. LATE PROPOSALS

The City, in its sole discretion, may consider proposals received by the City after the proposal due date.

19. CHANGES IN THE RFQ/P

- After this RFQ/P is issued, the City, in its sole discretion, may change everything or anything contained in this RFQ/P at any time including after the Proposal due date. If the change is prior to the proposal due date, the City reserves the right, when considered necessary or appropriate, to modify this RFQ/P.
- If the City shall amend the RFQ/P after the proposal due date, the City may, in its sole discretion, solicit new proposals in an amended RFQ/P from anyone or everyone regardless whether a person submitted a proposal in response to the original RFQ/P.

20. CHANGES IN EXECUTED CONTRACT AND ADDITIONAL WORK

- After the City executes a contract in accordance with the requirements of Section 432.070, RSMo, the City Charter and City Ordinances, the City may, in its sole discretion, amend the contract to change anything or everything associated with the contract as long as such change is in the interest of the City and as long as the Contractor agrees to the change.
- The City, in its sole discretion, may award additional contracts for related work or subsequent Project phases to the selected Contractor.
- The City, in its sole discretion, may extend the term of the contract with the selected Contractor notwithstanding the expiration of the initial term or any subsequent term or all options to renew, until the City has a new contract in place with either Proposer or another provider or until the City terminates the Contract.

21. PROPOSER SOLELY RESPONSIBLE FOR ALL COSTS

Regardless of the amount of time, effort, cost and expense incurred by a Proposer in Proposer's attempt to win this City contract, Proposer agrees that Proposer shall be solely responsible and liable for any and all costs incurred by Proposer.

The City shall have no liability or responsibility for any of Proposer's costs or expenses.

22. OWNERSHIP OF PROPOSALS

By submitting its Proposal, Proposer hereby agrees that Proposer's Proposal and any supplementary material submitted by the Proposer shall become property of the City.

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23. DISCLOSURE OF PROPRIETARY INFORMATION

- A Proposer may attempt to restrict the disclosure of scientific and technological innovations in which the Proposer has a proprietary interest, or other information that is protected from public disclosure by law, which is contained in the Proposal by marking each response of each such document prominently with the words "Proprietary Information";
- After either a contract is executed pursuant to the RFQ/P, or all submittals are rejected, if access to documents marked "Proprietary Information", as provided above, is requested under the Missouri Sunshine Law, the City will notify the Proposer of the request, and it shall be the burden of the Proposer to establish that such documents are exempt from disclosure under the law.
- If the Proposer elects to challenge a formal request for such information made to the City and if the Proposer is unsuccessful in keeping such information closed, the Proposer shall pay for any and all costs, attorney fees and fines that are a result of Proposer's attempt to keep the information closed.
- Notwithstanding the foregoing, in response to a formal request for information, the City reserves the right to release any documents if the City determines that such information is a public record pursuant to the Missouri Sunshine Law. The City shall have no liability to any Proposer or anyone else for releasing any Proprietary Information of a Proposer even if the City is negligent in releasing or disclosing any Proprietary Information of any Proposer.

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24. CLOSED RECORDS

All Proposals including interviews, presentations and documents, and meetings relating thereto may remain closed records or meetings under the Missouri Sunshine Law until a contract is executed or until all Proposals are rejected by the City. If the City amends this RFQ/P, Proposals submitted in response to the original RFQ/P may remain closed records until a contract is executed or all proposals submitted in response to the amended RFQ/P are rejected.

Proposals shall remain closed records even if the City mistakenly informs all Proposers that it is rejecting any and all Proposals prior to amending the RFQ/P as long as the City intends to amend the RFQ/P and resolicit Proposals.

25. AFFIRMATIVE ACTION

It is the policy of the City that any person or entity entering into a contract with the City, will employ applicants and treat employees equally without regard to their race, color, sex, religion, national origin or ancestry, disability, sexual orientation, gender identity or age.

The City's Affirmative Action ordinance requires that any person or entity who employs fifty (50) or more persons and is awarded a contract from the City totaling more than $300,000.00 must:

- Execute and submit an affidavit, in a form prescribed by the City, warranting that the Contractor has an affirmative action program in place and will maintain the affirmative action program in place for the duration of the contract.
- Submit, in print or electronic format, a copy of the Contractor's current certificate of compliance to the City's Human Relations Department (HRD) prior to receiving the first payment under the contract, unless a copy has already been submitted to HRD at any point within the previous two (2) calendar years. If, and only if, Contractor does not possess a current certification of compliance, Contractor shall submit, in print or electronic format, a copy of its affirmative action program to HRD prior to receiving the first payment under the contract, unless a copy has already been submitted to HRD at any point within the previous two (2) calendar years.
- Require any Subcontractor awarded a subcontract exceeding $300,000.00 to affirm that Subcontractor has an affirmative action program in place and will maintain the affirmative action program in place for the duration of the subcontract.
- Obtain from any Subcontractor awarded a subcontract exceeding $300,000.00 a copy of the Subcontractor's current certificate of compliance and tender a copy of the same, in print or electronic format, to HRD within thirty (30) days from the date the subcontract is executed. If, and only if, Subcontractor does not possess a current certificate of compliance, Contractor shall obtain a copy of the Subcontractor's affirmative action program and tender a copy of the same, in print or electronic format, to HRD within thirty (30) days from the date the subcontract is executed

If you have any questions regarding the City's Affirmative Action requirements, please contact HRD at (816) 513-1836 or visit the City's website: www.kcmo.gov

26. TAX CLEARANCE FOR CITY

Prior to the City making the first payment under any contract or contract renewal term, Contractor must provide a tax clearance letter from the City's Commissioner of Revenue dated not more than ninety (90) days from the date of submission.

Proposers may obtain this tax clearance letter from the City's Revenue Division at (816) 513-1135 or (816) 513-1089.

http://www.kcmo.gov

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27. INDEMNIFICATION

The City's standard contract requires that the Contractor shall indemnify, defend and hold harmless the City and any of its agencies, officials, officers, or employees from and against all claims, damages, liability, losses, costs, and expenses, including reasonable attorneys' fees, arising out of or resulting from any acts or omissions in connection with the contract, caused in whole or in part by Contractor, its employees, agents, or Subcontractors, or caused by others for whom Contractor is liable, including negligent acts or omissions of the City, its agencies, officials, officers, or employees. The contract requires Contractor to obtain specified limits of insurance to insure the indemnity obligation. **Contractor has the opportunity to recover the cost of the required insurance in the Contract Price by including the cost of that insurance in the Proposal.**

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28. BUY AMERICAN AND MISSOURI PREFERENCE POLICIES

- Buy American Preference. It is the policy of the City that any manufactured goods or commodities used or supplied in the performance of any City contract or any subcontract thereto shall be manufactured or produced in the United States whenever possible. When proposals offer quality, price, conformity with specifications, term of delivery and other conditions imposed in the specifications that are equal, the City shall select the proposal that uses manufactured goods or commodities that are manufactured or produced in the United States.
- Buy Missouri Preference. It is the policy of the City to give preference to all commodities manufactured, produced, or grown within the State of Missouri and to all firms, corporations, or individuals doing business as Missouri firms, corporations, or individuals, when the quality is equal or better and delivered price is the same or less. It is the Proposer's responsibility to claim these preferences.

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29. MISSOURI SECRETARY OF STATE BUSINESS ENTITY REGISTRATION

Prior to execution of a contract with the City, the apparent successful Proposer must submit a current copy of Proposer's Certificate of Good Standing from the Missouri Secretary of State's website.
http://www.sos.mo.gov

30. CITY OF KANSAS CITY MISSOURI BUSINESS LICENSE

Prior to execution of a contract with the City, the apparent successful Proposer must submit a current copy of Proposer's valid business license.

Proposers may obtain this business license from the City's Revenue Division/Business License section at (816) 513-1135 or visit the City's website. http://www.kcmo.gov

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31. PROHIBITED ACTIVITIES BY FORMER CITY EMPLOYEES AND OFFICIALS

Section 2-1018 of the City's Code prohibits former elected City officials and former executive or administrative employees of the City from trying to influence a decision of the City on behalf of an employer or client for one (1) year after that former employee or official leaves the City's employ. By submitting a Proposal, Proposer affirms that Proposer and its team members and employees are in compliance with the requirements of Section 2-1018. Failure to comply with the requirements of Section 2-1018 may cause the Proposal to be rejected.

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32. EMPLOYEE ELIGIBILITY VERIFICATION

If this contract exceeds five thousand dollars ($5,000.00), Supplier shall execute and submit an affidavit, in a form prescribed by the CITY, affirming that Supplier does not knowingly employ any person in connection with the contracted services who does not have the legal right or authorization under federal law to work in the United States as defined in 8 U.S.C. §1324a(h)(3). Supplier shall attach to the affidavit documentation sufficient to establish Supplier's enrollment and participation in an electronic verification of work program operated by the United States Department of Homeland Security to verify information of newly hired employees, under the Immigration and Reform and Control Act of 1986. Supplier may obtain additional information about E-Verify and enroll at https://e-verify.uscis.gov/enroll/StartPage.aspx?JS=YES.

For those Suppliers enrolled in E-Verify, the first and last pages of the E-Verify Memorandum of Understanding that Supplier will obtain upon successfully enrolling in the program shall constitute sufficient documentation for purposes of complying with this section. Supplier shall submit the affidavit and attachments to the CITY prior to execution of the contract, or at any point during the term of the contract if requested by the CITY.

The affidavit is found under Section IV - Attachments and Exhibits.

33. COOPERATIVE PROCUREMENT WITH OTHER JURISDICTIONS

Proposer must acknowledge acceptance or decline by returning the form found under Section III - Special Instructions and Conditions.

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34. MBE/WBE GOALS

- The City desires that City certified Minority Business Enterprises (MBEs) and City certified Women Business Enterprises (WBEs) have a maximum opportunity to participate in the performance of City contracts. The MBE/WBE participation goals for this Project are split. This RFQ/P requires 10% DBE/MBE participation and 5% WBE participation.
- The City's HRD Forms and Instructions are incorporated into this Request for Proposals and the Contract Documents.
- Please complete HRD Form 13 - Affidavit of Intended Utilization and attach it to this RFP response where indicated. The City of Kansas City, Missouri has a list of City Certified MBEs/WBEs at

https://kcmohrd.mwdbe.com/FrontEnd/VendorSearchPub...

35. WAIVER OF MBE/WBE REQUIREMENTS

The City Council, in its sole discretion, may waive any and all MBE/WBE requirements imposed by this solicitation and any Proposal Documents or the MBE/WBE Ordinance, and award the contract to the best Proposer if the City Council determines a waiver is in the best interests of the City.

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1. Have you read the above Instructions and Conditions?

True

2. Scope of Services

About the Requestor

Kansas City, Missouri (the "City) lies on the western edge of Missouri. Among the 100 largest cities in the United States, it is the most centrally located in the lower 48 states. This central location makes it very competitive for employment involving transportation, communication and distribution.

The City covers 319 square miles and is home to approximately 470,000 residents, making it the largest city in Missouri, both in area and in population. Its area is the 11th largest among United States cities that are not consolidated with counties. Its population is the 37th largest in the United States. The City lies within parts of four counties; Cass, Clay, Jackson, Platte and 15 public school districts. It is at the center of a 14-county metropolitan area with approximately 2,085,000 residents.

In 2012, the City Council adopted the AdvanceKC strategy , a comprehensive economic development strategy, aimed at improving the City's economic competitiveness nationally and globally. AdvanceKC further recommends that the City's policies include an ongoing data-supported analysis of the impact of awarded incentives based on the City Council's economic development strategic priorities.

About the Project

By resolution, the City Council has directed the City Manager to develop a plan for the purposes of engaging a consultant to conduct a comprehensive study of economic development incentives. The study shall take into consideration the City's economic development objectives as established by AdvanceKC.

Being able to evaluate the overall use of incentives is an important part of understanding the City's overall financial outlook and will inform future economic development policy direction. It will also increase transparency and accountability by establishing a process and system to capture, maintain, and report historic and future economic development project data which is readily accessible to policy makers and the public. As early investments in revitalization mature, many of the City's projects will fully return to the tax rolls, providing additional resources to its taxing jurisdictions. Much of our City's historic use of incentives has been tied to the revitalization of downtown, which began in earnest in the mid to late 1990s. As such, those investments would be anticipated to mature in the next three to eight years making this an ideal time to evaluate the use of incentive tools.

In order to evaluate the impacts of incentive use, and determine outcomes, we need to understand when, where and how the City and other taxing jurisdictions will see, and have seen, the benefits of those early investments. A comprehensive evaluation of the City's historic use of incentives to-date is needed to provide a qualitative and quantitative assessment of the tools and inform future economic development incentive policy.

The City of Kansas City receives its statutory authority to convey economic incentives pursuant to multiple state statutes. These same statutes include authorization to establish multiple statutory agencies whose authority may be direct or advisory to the City Council. These "Economic Development Agencies" responsibilities include oversight and administration of various economic development incentive programs for the purpose of conveying the benefits of certain tax exemptions, tax abatements, tax redirections, and/or direct financial support from the City for the purpose of economic development. These benefits are conveyed through a variety of different mechanisms including issuance of bonds, conveyance of title, direct contractual agreement or other approaches specific to the powers of each agency and the needs of individual projects.

The City's Economic Development Agencies for the purpose of this study include - the Land Clearance for Redevelopment Authority (LCRA), the Tax Increment Financing Commission (TIF Commission), the Downtown Economic Stimulus Authority (DESA), the Enhanced Enterprise Zone Boards (EEZ), the Planned Industrial Expansion Authority (PIEA) and the Kansas City Chapter 353 Advisory Board (353 Board) which administer programs for their respective programs. Additionally, the City directly and via the Economic Development Corporation of Kansas City, the umbrella economic development agency for the City, and the Port Authority have additional authority to convey certain economic incentive benefits authorized pursuant to other Missouri State Statutes including Chapter 100 and Chapter 353. Major statutory authorizations are provided for reference below:

Chapter 67: http://www.moga.mo.gov/mostatutes/ChaptersIndex/ch...
Chapter 99: http://www.moga.mo.gov/mostatutes/chapters/chapTex...
Chapter 100: http://www.moga.mo.gov/mostatutes/chapters/chapTex...
Chapter 135: http://www.moga.mo.gov/mostatutes/ChaptersIndex/ch...
Chapter 353: http://www.moga.mo.gov/mostatutes/chapters/chapTex...

Project Tasks

This analysis seeks to complete three major tasks, which may be proposed in a phased approach as deemed appropriate by the responder, but shall include at a minimum the following:

Task 1 - Identify Key Performance Indicators for all Incentives Programs

Task 2 - Complete a Historical Analysis of Key Performance Indicators

Task 3 - Assist the City in Developing On-going Monitoring and Reporting Systems

And assist the City in answering questions such as:

1. How much and what type of constructed and/or improved public infrastructure has resulted from the City's economic development efforts? What percentage of the City's overall infrastructure investment does this represent?
2. What has been the impact on assessed values and tax revenues?
3. How much new private investment has been leveraged through public incentives?
4. What has been the relative distribution of tax revenues committed to incentives projects across all taxing jurisdictions?
5. What has been the actual vs. projected performance for projects plans, and programs?
6. Has the City's use of incentives had a direct impact on real estate market values and/or business/job growth rates within incentivized areas, and if so, what, if any, are the multiplier effects on surrounding neighborhoods/census tracts?
7. What are the best metrics for evaluating the City's historic and future use of incentives?
8. How can we further align economic development incentives efforts with the AdvanceKC Strategic Plan and Council's ED Policies?
9. How can we better inform the public about the City's use of incentives?
10. What are some of the best practices for monitoring and reporting?

Task 1 - Identify Key Performance Indicators for all Incentives Programs

Although the public purposes for most economic development programs are similar and aimed at one of two primary objectives - elimination of blight and retention or creation of jobs, the mechanism for getting to these objectives varies from program to program.

These objectives are traditionally accomplished through facilitation of one of the following types of investment -

- improvements to real property including new construction and/or redevelopment of existing property,
- improvements to public infrastructure in the form of new construction and/or rehabilitation of existing infrastructure, and
- business retention and expansion in the form of new equipment purchases, and expansion of operations.

Metrics needed to evaluate the long-term outcomes of these historic investments may vary from program to program depending on statutory requirements, project characteristics, and local economic development policy objectives.

In conjunction with this project the City seeks assistance from the selected consulting firm/team to identify the essential key performance indicators, appropriate statistical analysis techniques, relevant analytical data, and other information needed to evaluate the long-term outcomes of these historic economic development efforts and the ability to measure outcomes for future investments. Identification of key performance indicators will also ensure that the City's efforts to compile and centralize project, plan and program data are completed quickly and efficiently and focused on gathering only the most important pieces of data.

The City has identified additional temporary staffing resources that will be available to support the data collection needs of the project. Coordination and supervision of temporary project staff will be handled through the City's Office of Economic Development in consultation with the selected consulting firm/team. The consultant's role will be to assist the City in identifying essential data points and working to collaboratively develop a scope of services for the analysis to be completed as part of Task 2.

Task 2 - Complete a Historical Analysis of Key Performance Indicators

The City anticipates that this analysis would quantify and evaluate the City's aggregated project level, plan level and program level economic incentives data inclusive of all statutory agencies conveying tax abatements or exemptions, or redirecting tax revenues, and/or all contracts entered into directly with developers, businesses, and/or property owners for the purpose of furthering historic economic development projects.

This analysis should quantify and analyze the City's historic use of incentives for a minimum of 25 years commencing in 1990 (subject to availability of suitable source data to be provided by the City), and present such data in a manner that it can be used to evaluate the results of all economic development programs, plans, and projects for the specified timeframe. Subject to consultation with the selected consulting firm/team and development of a final scope of services in collaboration with the City, this analysis should seek to aggregate and evaluate key performance indicators identified in Task 1 according to the following tentative categorizations including but not limited to:

- Incentive Type (Redirection, Abatement, Contractual Funding, etc.)
- Incentive Program (TIF, LCRA, PIEA, 353, etc.)
- Program Modifications (Payments in Lieu of Taxes, Economic Activity Taxes)
- Property Use (including Residential, Commercial, Industrial, Retail, Hotel) each of which may be further sub-categorized
- Time of Implementation
- Geography
- Economic Development Objective (Blight, Conservation, Job Creation, Public Infrastructure, etc.)
- Project Funding (Pay-as-you-go, Bonded)
- Measurements for Impacts of Multiple Layered Incentives
- Other project categorizations as determined appropriate in collaboration with the consulting team to achieve the City's project objectives

<u>Task 3 - Best Practices - Implementation Policies, Monitoring and Reporting</u>

A key objective of this project will be to identify local government best practices in administering economic incentives programs. Additionally the City is seeking to develop ongoing reporting and monitoring practices reflecting national best practices to ensure that the data collected and analyzed is maintained and easily accessible to the public and policy decision-makers. Strategies to enhance communication and improve transparency in the deployment of economic development incentives are also needed to ensure that the public clearly understands the positive benefits of these efforts.

This analysis should identify local government best practices for data collection, monitoring, and reporting of economic incentives as well as economic development policy administration. Specifically, the selected firm should review and compare against best practices at a minimum the following:

- Economic Incentives Program Administration - This analysis should review existing policies and procedures for prioritizing, processing and vetting incentives requests, and evaluate their operational efficiency and alignment with stated policy objectives as identified in the City's AdvanceKC strategic plan and policy { copies attached to this RFQ}
- Monitoring - This analysis should evaluate and rank the capacity and effectiveness of existing legacy software systems and platforms to meet the City's current and future needs for capturing, analyzing and reporting economic incentives data at the program, plan and project levels. This analysis should identify best practices in local government economic incentives data collection systems and compare these benchmarks against existing systems.Existing software platforms that may be evaluated include Salesforce, PeopleSoft, EnerGov, MySidewalk, SalesForce, and CoStar, subject to negotiation as part of the final scope of services. This analysis should also evaluate current contract monitoring practices and identify monitoring duplications and/or gaps and develop a plan for improvement.

- Reporting - This analysis should review all existing economic incentives reporting across agencies including the City, the Economic Development Corporation and its associated statutory agencies (PIEA and Port Authority) and identify reporting gaps, duplications, and/or practices which should be replicated. It should also be evaluated for effectiveness at communicating key performance indicators and clearly communicating the outcomes at the program, plan and project level, and compared against other local government best practices (including examples of reporting types). Recommendations should include suggestions for improved practices including report types, audiences, and mechanisms of conveyance.

1. Have you read and do you agree to the Scope of Services? If you have any narrative, please place it in the comments box for this question.
True

2. If there are any concerns/issues with this section, please place a detail of those items in the comments box for this question.
True

3. Authorized Representative Form

By submission of the RFQ/P response, the Proposer certifies that:

1 It has not paid or agreed to pay any fee or commission, or any other thing of value contingent upon the award of this contract, to any City of Kansas City, Missouri employee or official or to any current consultant to the City of Kansas City, Missouri;
2 It has not paid or agreed to pay any fee or commission or any other thing of value contingent upon the award of this contract, to any broker or agent or any other person;
3 The prices contained in this Proposal have been arrived at independently and without collusion, consultation, communication or agreement intended to restrict competition;
4 It has the full authority of the Offeror to execute the Proposal and to execute any resulting contract awarded as the result of, or on the basis of, the Proposal;
5 Proposer will not withdraw the Proposal for six months.

1. I hereby certify that I have both the legal authority from my business/firm and the right to enter into this contractual agreement with the City of Kansas City, Missouri, and have read, understood, and hereby fully accept all the terms, conditions, specifications, and pricing information contained within this document as well as any and all subsequent pages, addenda, and notices.
True

2. Authorized Representative name and title
Dean Uminski, Partner

3. Authorized Representative phone number and email address

(312) 966-3010
dean.uminski@crowehorwath.com

4. Firm's name and physical address

Crowe Horwath LLP
225 West Wacker, Suite 2600
Chicago, IL 60606

5. Email address for Purchase Order

dean.uminski@crowehorwath.com

4. Cooperative Procurement with other Jurisdiction form

The Proposer agrees to provide products and/or services to any municipality, county, state, governmental, public utility, non-profit hospital, educational institute, special governmental agency, and non-profit corporation performing governmental functions that participates in or is represented by the Mid-America Council of Public Purchasing (MACPP) in the greater Kansas City Metropolitan Trade Area and any member of the Mid-America Regional Council (MARC).

1. Do you agree to the statement above?

True

5. Standard City Contract

Please review the attached Standard City Contract.

1. Will you be able to comply with the Standard City Contract?

True
The sections that we would like to make changes to if Crowe is selected as the firm to perform the project are as follows: Sec. 19. General Indemnification Sec. 20.Indemnification for Professional Negligence Sec. 21 Insurance Sec. 22.Interpretation of the Contract Sec. 31.Annual Appropriation of Funds Sec. 32.No Punitive or Consequential Damages Sec. 33.Third Party Claims Sec. 34.Time Limit Sec. 35.Response to Process Sec. 36 Arbitration Please see the attachment in the message we sent in response to providing further details on this question. There were not enough characters available in this comment section to re-submit our entire response.

2. Please state any questions or concerns you have regarding the Standard City Contract.

In principle, we will be able to comply with the majority of the contract as written. However, as typical with other large contracts Crowe has specific provisions that we would like to be considered should we be selected to do this work.

6. Business/Firm Profile and Legal Structure

Please prepare responses for each of the following in the space provided:

1. Legal Name, address, phone, fax, e-mail, Federal ID#, and website address.

Legal Name: Crowe Horwath LLP
Headquarters Address: 225 West Wacker Drive, Suite 2600, Chicago, IL 60606-1224

Headquarters Phone Number: 312-899-7000
Headquarters Fax Number: 312-899-5300
Email: dean.uminski@crowehorwath.com
FEIN: 35-0921680
Website Address: www.crowehorwath.com

2. Brief history of business/firm including date the business/firm was established under the current name.

Crowe Horwath LLP is one of the largest public accounting, consulting, and technology firms in the United States. Connecting deep industry and specialized knowledge with innovative technology, our dedicated professionals create value for our clients with integrity and objectivity. We accomplish this by listening to our clients - about their business, trends in their industry, and the challenges they face. We forge each relationship with the intention of delivering exceptional client service while upholding our core values and our industry's strong professional standards. Crowe invests in tomorrow because we know smart decisions build lasting value for our clients, people, and profession.

Deep Specialization

Our vision is built on deep specialization and a "One Crowe" approach - a focus on our clients, our people, and the hallmarks of our profession: integrity, objectivity, and independence. By aligning our specialists along industry lines, we bring deeper and broader knowledge to our services. This industry specialization gives us a better view to understand your business and the unique challenges you face. You can trust us to help you with your market and business challenges because of our proven reputation and track record for credibility among key industry players, including lenders and professional organizations.

Crowe was founded in South Bend, Indiana in 1942. In 2008, Crowe became Crowe Horwath LLP.

3. List all services provided by the business/firm.

Crowe is unique in that we have dedicated teams focused on key markets, including:

Banking; Construction; Financial Services; Food and Commodities; Government; Healthcare; Higher Education; Manufacturing and Distribution; Not-for-Profit; Private Equity Groups; and Retail Dealerships.

4. Number of total employees including number of total employees in Kansas City, Missouri and number of employees in Greater Kansas City Area.

Crowe has over 3,000 employees, including 26 from the St. Louis, Missouri office, across the United States.

Crowe has offices across the U.S. and has 26 professionals in our St. Louis, MO office. Although we do not have any employees in the Greater Kansas City Area, we have recently implemented a new firm wide "Mobility" policy. With this new policy we are able to staff assignments with professionals who are more qualified for specific assignments such as what Kansas City is looking for. We have also reached out to several MBE/WBE firms in the Kansas City area and would use them if we are awarded the contract.

5. Type of ownership, or legal structure of business/firm.

Limited Liability Partnership

6. Has the business/firm ever failed to complete work for which a contract was issued? If yes, explain the circumstances.

Like all large professional service firms, Crowe is, from time to time, subject to contract disputes or issues where contracts may be terminated for a variety of reasons, including without limitation lack of client funding, disputes over the scope of the work, or payment disputes. Through active management and communication with our clients, Crowe is usually successful in anticipating such areas and working with the client to mitigate these issues.

Crowe has had clients cancel contracts due to lack of funding or changes in the client goals, or requirements, or changes in elected officials.Crowe does not track these infrequent events over time.

7. Are there any civil or criminal actions pending against the business/firm or any key personnel related in any way to contracting? If yes, explain in detail. Are there any current unresolved disputes/allegations?

Like all large professional service firms, Crowe Horwath LLP is subject to claims from time to time for a variety of reasons, and we occasionally receive notice of claims. Crowe has pending litigation, but it is Crowe's policy not to discuss any specific matters. However, in the view of management there are no (a) current claims that will result in significant losses to Crowe or (b) pending or threatened litigation, administrative or regulatory proceedings or similar matters that could affect its ability to perform the required services. Crowe has not been the target of any criminal investigation, indictment, prosecution or other proceeding and there are no known felony convictions of any Owners, officers, or primary partners of Crowe.

Crowe has no criminal actions pending, nor do any key personnel of Crowe.Crowe has pending civil claims for professional negligence, but none related to these types of services or the personnel expected to assist with this engagement.

8. Provide a brief history of the business/firm's contractual litigation, arbitration, and mediation cases for the last five (5) years that are material and relevant to this contract.

Like all large professional service firms, Crowe Horwath LLP is subject to claims from time to time for a variety of reasons, and we occasionally receive notice of claims. Crowe has pending litigation, but it is Crowe's policy not to discuss any specific matters. However, in the view of management there are no (a) current claims that will result in significant losses to Crowe or (b) pending or threatened litigation, administrative or regulatory proceedings or similar matters that could affect its ability to perform the required services. Crowe has not been the target of any criminal investigation, indictment, prosecution or other proceeding and there are no known felony convictions of any Owners, officers, or primary partners of Crowe.

Crowe has one material lawsuit pending:the Colonial lawsuit, which relates to outsourced internal audit services.Crowe believes the claim is frivolous and is defending the lawsuit vigorously.There are no issues in the lawsuit that relate to the professional services anticipated under this procurement.

9. Has the business/firm ever been disqualified from working for the City or any other public entity? If yes, explain the circumstances.

Crowe has not been disqualified from working for the City or any other public entity.

10. Provide proof of financial capacity to perform this contract, such as Dun and Bradstreet or audited financial statements.

Founded in 1942, Crowe is celebrating more than 70 years of stability, growth, and innovation. We are committed to a national expansion program that aligns with serving the needs of our clients.

Crowe ranks as the eighth largest national firm based on U.S. net revenue.*

If needed, Crowe will make the balance sheet and income statement summary (financial statements) of Crowe Horwath LLP, which we assert are confidential, available to the City, for inspection and examination by the appropriate staff. We will be pleased to provide you any additional information you may need to determine our financial stability.

Please note, Crowe Horwath LLP is privately held and asserts that its financial statements are confidential trade secret information. The financial statements provided are not audited as we do not issue audited financial statements or annual reports. ** The 2015 Accounting Today Top 100 Firms*

D&B #: '061567608

7. Experience

For questions 1-5 below, describe the five (5) most relevant or comparable contracts completed by your business/firm during the past five (5) years.

For each listed contract, provide a narrative that includes:

1. the assigned project personnel
2. scope of services provided
3. dollar amount of the contract
4. the contracting entity's contact person, e-mail address, cell phone number, and telephone number
5. summary of how your business/firm delivered services

1. Relevant contract description #1

Department of Commerce and Economic Opportunity, Illinois

The Department of Commerce and Economic Opportunity engaged Crowe to provide a comparative analysis across multiple, surrounding states in order to improve and revitalize the Illinois Economic Development for a Growing Economy (EDGE) tax credit. Crowe was able to identify best practices to assist in making Illinois more competitive for business expansions, relocations, and job creation while ensuring transparency and fairness and providing recommendations for the improved EDGE program.

Assigned Project Personnel: Dean Uminski, Kevin Spiegel, Cary Black, Zach Robbins and Joe Salsbury.

2. Relevant contract description #2

California Milk Advisory Board

In 2014 Crowe was engaged by the California Milk Advisory Board to conduct a comparative analysis across multiple states that not only included industry factors such as regional plant financials, long-term milk supply prospects, and business climate, but also the effect California tax policy, economic incentive, labor factors, and environmental regulations had in comparison to other states. Crowe was then able to analyze the results and provide recommendations on strengths and weakness of the existing policy, helping the California Milk Advisory Board address detrimental policies and attract new dairy producers.

Assigned Project Personnel: Dean Uminski Joe Salsbury, Dean Lisowski, Scott Tarney, Ben Paczkowski.

3. Relevant contract description #3

City of South Bend, Indiana

The City of South Bend engaged Crowe to assist with the financing of a new parking garage, street extension, upgrade and replacement of water mains, sanitary and storm sewers and site preparation and the extension and upgrading of electrical, telephone and high speed internet services for the Eddy Street project. The Eddy Street project is a multi-use area that encompasses retail, office and residential living and was developed, in part, by TIF funds.

Assigned Project Personnel: Herschel Frierson and Andrew Perry.

4. Relevant contract description #4

Indiana Economic Development Corporation (IEDC)

Crowe partnered with the Indiana Economic Development Corporation (IEDC) to perform a number of strategic engagements critical to the IEDC realizing their vision of a holistic integrated set of solutions that will not only improve how their customers and partners do business with the IEDC, but also improve the IEDC's ability to access and mine real-time data, including:

Economic Development System/Portal

Crowe engaged with the State of Indiana's lead economic development agency, the Indiana Economic

Development Corporation (IEDC) to design, build and deploy a web-based information management system specific to the needs of development agencies. Specifically, the information management system provides the IEDC with complete end-to-end tracking of all companies, contacts, development projects, incentives and grants related to the attraction, management, oversight and compliance reporting in one comprehensive system. Crowe's solution integrated the disparate systems among its four internal departments, creating a centralized repository for information that can be accessed across the organization in real time. The solution captures key information such as:

- Companies, contacts and development projects,
- Stakeholder correspondence and activity history,
- Incentive applications and local municipality offers of support,
- Total and year-by-year analysis of key project metrics such as jobs, wage, capital investment, payroll and withholding data,
- Tax credit and grant incentive data including total award amount, total paid to date (grant) and total certified to date (tax credits),
- System calculated metrics such as jobs per payroll, incentives per jobs, incentives per capital investment,
- Annual project audit notes and key findings,
- Contractual non-compliance issues and work-out resolutions, and
- Statewide local and regional economic development partners.

As a result of these efforts, the IEDC has streamlined manual reporting, contact generation and contract management. The have implemented the processes and enabling technology platform to support greater collaboration, accountability, and transparency. Leadership has access to consistent and accurate information needed to support daily operations and strategic decisions. The system deployed by the IEDC supports approximately 75 users within the IEDC and approximately 200 local, regional and utility partners throughout the State. In addition, IEDC's current and prospective companies are able to use a web-based portal to submit requests, access and update their project-related data, and complete annual performance reporting. There are approximately 1,500 users across IEDC's prospective and active companies that use the IEDC's web-based system.

GIS System Selection

Crowe helped manage and oversee the system and vendor selection process for the implementation of a new GIS system and public facing website. Crowe created the evaluation criteria, clarified critical requirements, determined weightings and helped finalize the vendor selection process with IEDC selection team.

Project Lifecycle Tracking - Process/System Review

Crowe performed a complete review of existing processes and systems within the IEDC's project lifecycle tracking process, completed a gap analysis between current state and desired future state and prioritized all initiatives for implementation.

System Selection

Crowe developed the evaluation criteria and analysis of multiple Commercial Off-The-Shelf (COTS) systems for the IEDC to use in the selection of the operating platform. After system selection, Crowe managed the technical implementation and cutover from the IEDC's existing systems to their new consolidated customer, project and incentive tracking solution.

Assigned Project Personnel: Ashley Craig, Mindy Herman, Jeremy Cox and Ken Lu.

5. Relevant contract description #5

City of Lafayette, Indiana

Crowe worked with the City of Lafayette, to deploy Crowe Common Point 360 (CCP 360), a software-as-a-service solution for economic development and redevelopment entities. CCP 360 was deployed on the Microsoft Dynamics CRM online platform, and integrated with Microsoft SharePoint for document management. The system provides robust tracking and reporting capabilities for economic development, including tracking leads and opportunities, incentives, TIF districts, parcel information and financials. State required reporting is also provided out of the box to Indiana communities.

Assigned Project Personnel: Alicia Antonetti-Tricker and Ryan Dunn.

6. Provide a copy of your most recent relevant ongoing public contract.

City of Michigan City, Indiana - Economic Development Strategic Plan and Implementation

The Economic Development Corporation of Michigan City (EDCMC) Economic Development Strategic Plan was the result of a ten-month study and planning process, which included the active participation of city and regional stakeholders. Crowe worked with stakeholders and prepared key demographic trends and forecasts, social factors, economic factors and financial indicators that were included in our final Strategic Plan as a market segmentation of Michigan City's retail, commercial and industrial sectors. The Plan provided the EDCMC with the necessary framework to establish performance measurements and benchmarks to measure the City's progress throughout the Economic Development Strategic Planning process. The Plan identified key strategies for identifying and describing economic development potential and ways to grow and diversify the economy which included an emphasis on establishing planning parameters for setting a future growth policy for Michigan City's industry and workforce.

To achieve the above goal, the Plan identified ways to strategically position Michigan City to maximize its opportunities, including the setting of priorities that were identified in their SWOT Analysis. Another major factor was the development and initiation of a public involvement program that engaged the community throughout our ten-month study. We utilized electronic surveys, community open houses, social media campaigns, stakeholder meetings and other forms of community outreach, tailored specifically for the community.

The final report provided Michigan City with a blueprint to increase employment and educational opportunities, facilitate growth and expansion of their existing industries and businesses, improve the quality of life for all citizens, grow the tax base, further promote and develop the downtown and lakefront, and finally to position Michigan City as a great place to live, work, do business and accumulate the necessary wealth to ensure a long-term sustainability.

Assigned Project Personnel: Dean Uminski, Brian Smith, Joe Salsbury, and Yuliana Rivera.

7. Provide a list of all public contracts entered into for the last three (3) years. Include the dollar amounts, summary of scope of services, contract terms, Public Owner's contact person, e-mail address, cell phone number and telephone number.

It is against Crowe's policy to release client information without acknowledgement first. If the information is public then the City of Kansas City should be able to access the information.

8. Personnel

Please prepare responses for each of the following in the space provided.

Please make special note of staff capacity for meeting City's requirements, including capability to meet data requirements such as conducting high-level regression analysis or other statistical methods to evaluate economic and fiscal impacts.

1. Please provide your staff capacity for meeting the City's requirements.

Crowe possesses a wealth of experience in various economic development services across the country. We have carefully constructed a team of specialists with multidisciplinary experience in economic development - from strategic planning to public policy to incentive negotiation to tax restructuring to zoning redesign, and more.

Crowe has been working with government organizations for over 40 years on a variety of consulting engagements, and works with over 400 government organizations today. We have a focused Public Sector Services practice that provides advisory, tax, financial, technology, and risk services to public sector organizations.

We have assembled a strong and diverse team to work with Kansas City, experienced in providing economic development services. Crowe is familiar with the demands of a project like Kansas City's Economic Development Incentives Analysis.

2. Identify the Key Employees who are likely to be assigned to this contract if your proposal is selected. [NOTE: Key Employee(s) must be committed to the contract duration, and may not be removed or substituted without the City's prior written consent.]

Name
Dean Uminski, CCIP, *CEcD*
Scott Tarney
Joe Salsbury, CPA
Katelyn Armitage
Kasey Krueger
Tanner Wall
Herschel Frierson
Mark Adam
Sarah McFetridge

3. For each of the Key Employee(s), provide a resume and/or summary with at least the following background information: a. Description of relevant experience. b. Years of employment with the business/firm. c. City and State of residence. d. State time commitment on other accounts. e. Applicable professional registrations, education, certifications, and credentials.

Dean J. Uminski
CCIP, CEcD – Principal

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Chicago, Illinois 60606-1228
Direct 312.966.3010
Fax 312.899.5300
dean.uminski@crowehorwath.com
www.crowehorwath.com

Profile

Mr. Uminski is a Principal at Crowe and is a Certified Economic Developer (CEcD), leading the Economic Development & Site Selection Practices. He has 36 years of tax consulting, planning, economic development, and restructuring experience. Mr. Uminski is responsible for all aspects of economic development planning for clients, and various local, regional, and state economic development agencies.

Professional and Industry Experience

Mr. Uminski has performed site selection and economic development consultation services on over $4.5 billion of capital investment for manufacturing, wholesale/distribution, call centers, retail, service, research and development, and corporate/regional home office related projects in forty two states and Canada. His work entails all aspects of economic development planning including; market analysis, marketing and branding planning, workforce development, strategic planning, capital improvement planning, site location assistance, financing, exit strategy planning, business attraction and expansion/ retention planning, tax abatements, statutory and non-statutory tax credits and negotiations with local, regional and state economic development officials.

Education & Certifications

- Bachelor of Science in Business, Accounting
  - Indiana University | Bloomington, Indiana
- Certified Economic Developer (CEcD)
- Certified Credits & Incentives Professional with IPT (CCIP)

Client Focus

Services:

- State and local tax services
- Tax consulting

Industries:

- Government

Publications and Speaking Engagements:

- Mr. Uminski has authored several site selection articles for the AICPA Tax Advisor, Area Development Magazine and Plants Sites & Parks on property tax and other tax incentives.
- He is a frequent speaker on incentives and strategic planning for tax professionals, as well as to local and state economic development officials.

Professional Affiliations:

- Area Development Magazine | Editorial Advisory Board
- Institute for Professionals in Taxation | CCIP Designation Committee
- International Economic Development Council | Member

Joseph M. Salsbury
CPA- Manager

330 East Jefferson Boulevard
South Bend, Indiana 46624-0007
Direct 574.235.6871
Fax 574.236.8692
Joe.Salsbury@Crowehorwath.com
www.crowehorwath.com

Profile

Mr. Salsbury has been with Crowe Horwath LLP since January 2013 with the State and Local Tax Services group. He provides services related to credit and incentive procurement and compliance, income tax consulting and compliance, and property tax compliance.

Professional and Industry Experience

Mr. Salsbury has been involved in numerous business expansion and relocation opportunities and has negotiated credit and incentive deals in over 15 states.

He has also assisted clients with multistate income tax compliance, restructuring projects, ASC 740 analyses, voluntary disclosures, and state income tax audit controversies.

Mr. Salsbury has also performed personal property tax compliance for a number of clients and has filed personal property tax returns in numerous states around the country.

Professional Affiliations

Member, American Institute of Certified Public Accountants (AICPA)
Member, Indiana CPA Society

Client Focus:

Services:

Credit and Incentive Procurement
Multistate Income Tax Compliance
State Income Tax Planning
Property Tax Compliance

Industries:

Manufacturing & Distribution
Automotive
Private Equity Group

Community Involvement:

United Way
Habitat For Humanity
Boys and Girls Club

Scott Tarney
Senior Manager

10 West Broad Street, Suite 1700
Columbus, Ohio 43215-3454
Direct 614.469.4001
Fax 614.365.2222
scott.tarney@crowehorwath.com
www.crowehorwath.com

Profile

Scott Tarney has been with Crowe Horwath LLP since March, 2007 as the National Credits and Incentives Leader for the State and Local Tax Practice. Scott has over 33 years of tax experience with industry tax departments and public accounting firms, and 14 years' experience in general corporate tax.

Prior to joining Crowe, Scott was employed by a Big Four firm where he was a Regional Leader for three years for Ohio, Indiana, Michigan, Kentucky, and Pennsylvania in their National Credits and Incentives practice.

Professional and Industry Experience

During his career, Scott has provided economic development services, including site selection, business retention and expansion, incentive negotiation, and workforce development.

Professional Affiliations

International Economic Development Council (IEDC)
Institute for Professionals in Taxation (IPT)
Unclaimed Property Holder Liaison Council (UPHLC)
Tax Executive Institute (TEI)
Committee on State Taxation (COST)

Education and Certifications

Bachelor of Science, Accounting
Ohio State University | Ohio

Client Focus:

Services:

Credits and Incentives

Industries:

Manufacturing
Distribution
Private Equity
Professional Services

Herschel Frierson
Senior Manager

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Indianapolis, Indiana 46204-2975
Direct 317.269.2377
Fax 317.635.6127
herschel.frierson@crowehorwath.com
www.crowehorwath.com

Profile

Since joining Crowe in 1996, Mr. Frierson has worked on many projects pertaining to financial advisory services, utility consulting and general consulting. His work includes analysis of cash flows for various governmental units in preparation for proposed financings; revenue and tax impact studies for municipal bond issues; and escrow verification reports.

Professional and Industry Experience

Mr. Frierson has also provided assistance in economic development activities including feasibility studies; financing activities for tax increment and other incentive programs and annexation analysis, including compiling and analyzing survey data of attendees to a major trade show; and leading a special project for an urban township government to perform core accounting functions. He also provides rate and cost of service analysis for utility related engagements.

Publications and Speaking Engagements

- Indiana Association of Cities and Towns
- Association of Indiana Counties
- Lorman Education Services

Professional Affiliations

- National Association of Black Accountants, Inc.

Education & Certifications

- Bachelor of Science, Accounting
  - Butler University | Indianapolis, Indiana

Client Focus

Services:

- Debt Issuance and Management
- Financial Management
- Budgeting and forecasting
- Revenue and Fee Analysis
- Economic Development
- Tax Increment Financing

Industries:

- Public Sector

Community Involvement:

- National Association of Black Accountants, Inc. | Central Region President
- National Association of Black Accountants, Inc. | National Board Member
- NFL Community Impact | 2012 Indianapolis Super Bowl Host Committee Member

Other Crowe Personnel: Crowe has national expertise in many other specialty areas that can be called upon to provide added value to this engagement, as needed.
We do have established relationships with many firms that provide specialty in areas such as

Design/Architecture, Urban Planning, and Engineering. Should it become clear that additional niche services are required, we would collaborate with the City on whether it is necessary to engage and of our partners.

4. Please comment on the ability of your business/firm to sustain the loss of Key Employee(s).

We would like to emphasize our commitment to maintaining professional staff continuity in servicing this engagement. Many of our clients rely on having the same resources available to them because it reflects a commitment to their organization and a deeper understanding of what their organization is trying to achieve. Our staff builds a relationship based upon integrity, trust, and mutual respect, which is a primary reason that we maintain long-term professional relationships.

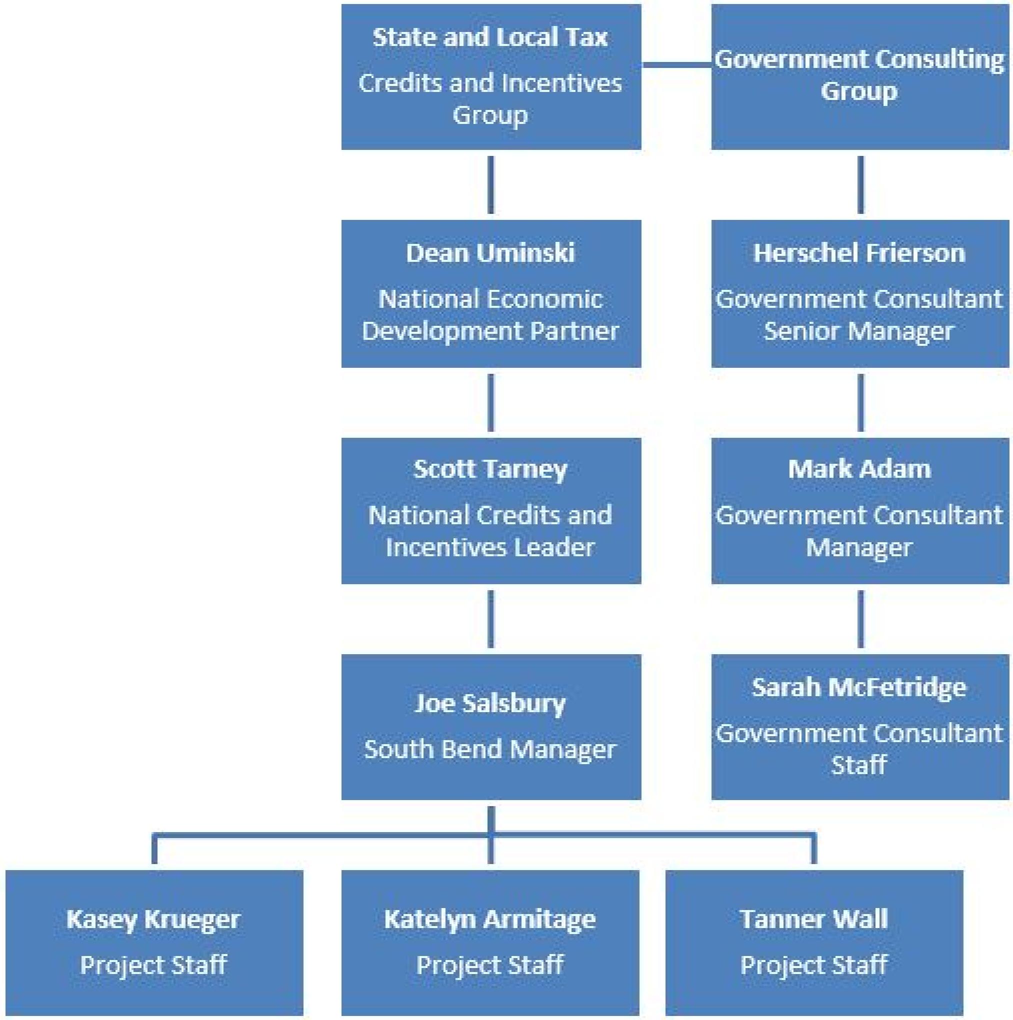
In assigning staff to engagements, we place high importance on maintaining continuity of staff from one year to the next. This is important from both a client service as well as an engagement efficiency perspective. As our staff gains familiarity with a client, they are able to complete the engagement more efficiently and are able to identify recommendations for improvement within our client's operations.

As with any accounting firm, it does at times become necessary to replace a member of the engagement team. When this occurs they are replaced with someone of comparable skills and experience. While we strive to maintain continuity, the turnover that is inherent in today's environment provides for staff rotation and the additional benefit of a fresh approach. We have been very successful over the years in appropriately staffing our jobs and this has resulted in high client retention rates and tremendous growth for the firm.

5. Provide a staffing plan for the contract including the locations of the positions.

Name	Firm	Location	Role
Dean Uminski, CCIP, CEcD	Crowe	Chicago	Engagement Partner
Scott Tarney	Crowe	Columbus	Project Manager
Joe Salsbury, CPA	Crowe	South Bend	Manager
Katelyn Armitage	Crowe	Columbus	Staff Consultant
Kasey Krueger	Crowe	Columbus	Staff Consultant
Tanner Wall	Crowe	Oak Brook	Staff Consultant
Herschel Frierson	Crowe	Indianapolis	Government Consultant Senior Manager
Mark Adam	Crowe	Indianapolis	Government Consultant Manager
Sarah McFetridge	Crowe	Indianapolis	Government Consultant Staff

6. Provide an organizational chart for the assigned staff.



7. Provide a plan to address vacations, sicknesses and absences.

Crowe is committed to completing projects on time. This is done through the development of a project timeline. This timeline takes into account the possibility of vacations and sick days of the personnel involved in the project. This will ensure that all tasks are competed on time.

9. Project Approach

Please prepare responses for each of the following in the space provided, with specific attention to the following:

Question 1 - include in your response a description of any potential phasing for the project and general deliverables, including a representative timeline for completion of each phase and the total project.

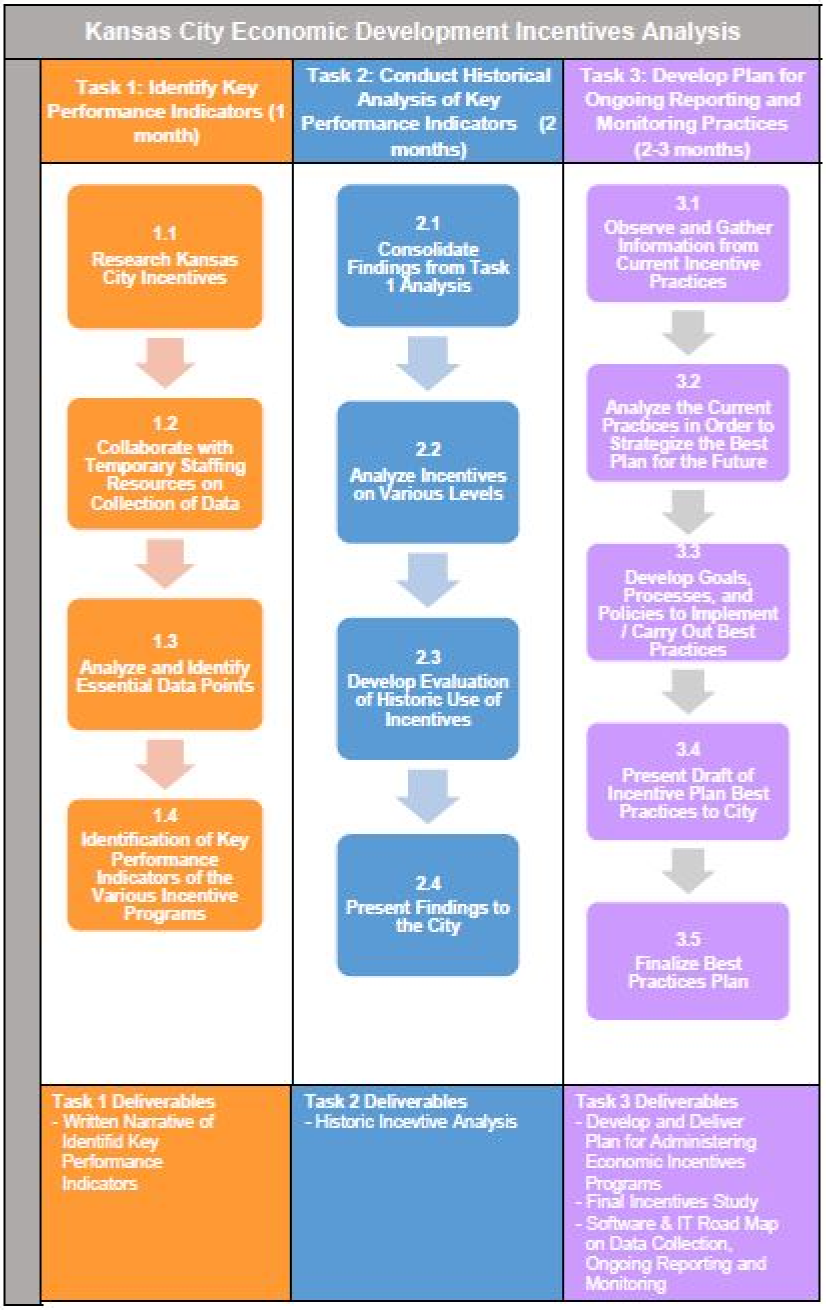
1. Discuss your approach to a project with specific references to the services requested in the RFP.

The Crowe Team has reviewed the RFP in detail and is experienced in each of the scope areas requested. We have studied the *"Project Tasks"*, detailed in the Scope of Services of the RFP, and have designed a project approach that we believe meets the needs. We have reviewed the relevant project materials, including existing planning efforts undertaken by Kansas City.

A summary of our Approach is included below, and detailed further in the Transition Plan section of our proposal.

Throughout our Approach, we will be focused on addressing the various issues that come out of the identification of key performance indicators, historical analysis of deemed key performance indicators, and the administration of the various economic incentives programs, with a special focus on what Kansas City has already identified as critically important:

- Quantifying the leverage public incentives have had on new private investment
- Comparison of historical and projected impact of the City's economic development efforts for project plans and programs, including the efforts on public infrastructure
- Relative distribution of tax revenues devoted to incentive projects
- Determining the multiplier effect on neighborhoods and consensus tracts that the City's utilization of incentives has had
- Best metrics for future valuation, monitoring and reporting of the City's use of economic development incentives.



2. Highlight unique services and management tools and indicate the benefits of them to the City. What makes your business/firm better than the competition?

Project Management Approach

We will provide ongoing and proactive project management across all phases, in all aspects of the project. This is key to project success. Crowe has extensive experience managing projects with a high level of information sharing in the public sector.

Crowe understands that participation from a number of entities and/or individuals is required for the

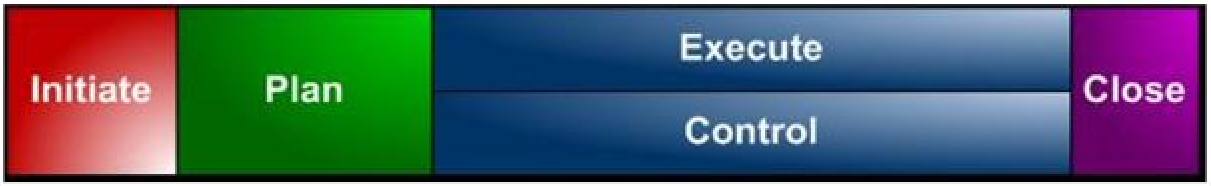
City to effectively fulfill the goals and objectives of this project. Keeping all parties aligned to deliver on a common goal is a significant challenge. In order to deliver as planned, the appropriate disciplines, structure, tools, and communication need to be in place to manage and align all work efforts. Crowe uses a standard methodology for project management, as outlined below. This methodology is aligned with the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK®).

Crowe has been performing Project and Program Management services within both the public sector and private sector for over forty years. Crowe works collaboratively with our clients to implement a project and program management approach that keeps all parties aligned and able to deliver as planned. As a part of this collaborative approach, we integrate client resources into the process and project structure. This allows us to leverage the unique expertise that exists within each organization, develop greater buy-in from client personnel and make it significantly easier to adopt and integrate the final solution into daily operations once the project is complete.

The following is a summary of Crowe's methodology for managing a project. Project management is a set of processes and standards used to manage work efforts with dependencies across groups, teams or activities, and keep all parties aligned to deliver on a common goal.

Throughout an initiative all parties must stay aligned on the purpose (what needs to be done), the organization (who is responsible for each activity), the methodology (how the work will be executed) and the timing (when the work will be done).

Crowe's project management methodology is broken down into five (5) stages:



Initiate - Defining the scope and the structure of the project
Plan - Establish tools, processes, standards and templates needed to support the project
Execute - Execute the project, and keep all activities within the project aligned
Control - Execute the necessary controls to enable the project is running effectively
Close - Wrap up all necessary details from the project.

Building upon the project management methodology, here are some examples of activities and tasks.

Phase and Objective	Activities and Tasks
Initiate Define and confirm the scope as well as the overall structure of the project, including roles, responsibilities and communication flow. Establish an initial high-level milestone plan.	■ Define the Project and Key Milestones ■ Define project scope ■ Define risks ■ Define major milestones and due dates ■ Define budget ■ Define the Project Structure ■ Review initial project charter ■ Develop project organizational chart ■ Review and Sign-off on the Acceptance of Deliverables
Plan Establish tools, processes, standards and templates needed to support managing the project. Develop a detailed project plan.	■ Establish Planning and Reporting Standards ■ Review project planning standards ■ Develop Detailed Project Plan ■ Review detailed project plan ■ Develop Processes for Execution and Control ■ Manage scope ■ Control quality and approve deliverables ■ Track budget to actual ■ Review and Sign-off on the Acceptance of Deliverables
Execute Execute the project and manage the activities, resources, issues, risks, quality, scope and budget. Communicate regularly to all necessary parties.	■ Monitor and Review Control Processes ■ Scope management ■ Budget management ■ Quality assurance ■ Review and Sign-off on the Acceptance of Deliverables
Control Execute the necessary controls to keep the project running effectively. These controls include monitoring and managing issues, risks, resources, quality, scope and budget.	■ Monitor and Review ■ Quality of deliverables ■ Scope changes ■ Budget ■ Execute the Approval Processes ■ Review scope changes (with possible budget changes) ■ Request Corrective Action Where Necessary ■ Quality or delivery issues ■ Scope issues ■ Budget issues ■ Review and Sign-off on the Acceptance of Deliverables
Close Wrap up all necessary details from the project. Document lessons learned in preparation for future projects.	■ Perform End of Project Quality Assurance Reviews ■ Deliverables ■ Budget ■ Perform Administrative and Contractual Closure ■ Project documentation and deliverables complete ■ Final budget ■ Vendor contracts

Crowe will work collaboratively with the City to manage this project. As part of this collaborative approach, we will work with the City to develop and coordinate all plans, activities, timelines, milestones and deliverables, as well as provide the necessary communication to all parties. This collaboration will allow us to leverage the unique expertise that exists within the City for developing comprehensive requirements for the case management solution. Crowe will work closely with your team to develop and finalize the scope, structure and staffing for the initiative. Together we will finalize a detailed plan with key project milestones, and will ensure all individuals participating in the initiative understand their responsibilities.

3. Describe your Quality Assurance Plan.

Crowe places strong emphasis on maintaining a high level of professional audit quality. To achieve this level of quality we have developed an internal quality control system led by our Assurance Professional Practice (APP) Group. We also undergo a triennial external peer review and as one of ten firms auditing more than 100 public companies, Crowe is subject the full, detailed annual inspection process of the Public Company Accounting Oversight Board (PCAOB). In addition, Crowe has a long-standing role of participation and leadership in national professional standards associations and regulatory organizations. Members of our firm serve on the Ethics Committees in their relevant states, the AICPA's national ethics committee.

Internal Quality Control Review

Crowe has a fully developed set of policy, procedure and review activities supporting our audit practice. Quality control for all assurance efforts is established by the national office of Assurance Professional Practice ("APP") and documented in our Quality Control Manual that includes the following six elements along with the related objectives:

- Leadership Responsibilities for Quality Within the Firm
- Relevant Ethical Requirements
- Acceptance and Continuation of Client Relationships and Specific Engagements
- Human Resources
- Engagement Performance
- Monitoring

APP is also responsible for managing and communicating independence and ethics directives of the Firm. All audit personnel are responsible for knowing and understanding important Firm protocol, including:

- Independence
- Integrity and Objectivity
- Technical and General Standards, including AICPA and accounting principles
- Information about our responsibilities to clients, including listings regarding commissions, confidential information and contingent fees
- Information about our other responsibilities and practices, including general information and listings related to commissions and discreditable acts

In addition, APP is responsible for handling inquiries from engagement teams on matters related to those policy areas.

APP also performs a function within our firm that we believe is unique among major firms. Most audit engagements, public or private, are subject to a pre-issuance review by APP. This includes a review of the financial statements and certain other deliverables and may include a review of the work papers supporting the judgments made on key accounting and auditing areas.

Another important quality control procedure is subjecting all public-company audit engagements to an engagement quality review by an individual other than the engagement authorized signer.

In addition to the PCAOB and peer review inspections, the firm also performs annual internal inspections of selected audit engagements. These inspections focus on adherence to professional standards and firm policies and procedures. This process is led by a member of APP.

4. State approximate date your business/firm is available to begin work on the Project.

The team Crowe has assembled for the project is available as soon as June 30, 2016 and will be available until the Required Project Completion Date of Fall 2016 as described in the Instructions and Conditions of the Proposal.

5. Discuss your transition plan to begin providing services.

Based on our proposed Project Approach described above in addition to the Scope of Services of the project, we have estimated a rough timeline for this project, below. It is possible that some of this work can take place in parallel. Some activities are ongoing as new information becomes available throughout the process. We have estimated roughly the 5-month project.

Please note that this is an estimated timeline based on comparable work for previous projects. We would work with Kansas City to come to a mutually beneficial timeline during the project planning phase of the project, and will work to prioritize areas you would like to focus on to ensure the timeline meets the needs of the City.

Kansas City Economic Development Incentives Analysis: Project Timeline

Phase	Time Period (estimated)			
	June 30th - August 15th	August 15th - Sept 15th	Sept 15th –Oct 15th	Oct15th - Nov15th
Planning and Initiation				
Task 1: Identify Performance Indicators				
Task 2: Conduct Analysis				
Task 3: Develop Plan for Ongoing Reporting and Monitoring Practices				
Project Management				

6. Propose additional performance measures including why the performance measure is important and how the City will measure and verify performance.

Why Do Our Clients Choose Crowe?

Clients tell us when our technical expertise, industry knowledge, and applied technology come together, exceptional service and value result. At Crowe Horwath LLP, we take pride in our relationships with our clients. Our vision is that our people come to work every day motivated to provide our clients with an exceptional experience in every interaction and to help our professionals maintain objectivity in the delivery of our services.

How Do We Do This?

We have learned from our clients that there are certain attributes important to their overall experience, and each client perceives value differently. To help us meet our clients' expectations, we conduct an engagement survey that allows our clients to evaluate our performance. Proof of this can be found in what our clients say about us, in our client engagement survey results, and through recognition we've received from client experience organizations.

Client Engagement Survey Results

Our 2015 client engagement surveys show that Crowe has achieved a 90 percent client engagement index score. According to our survey administrator, PeopleMetrics, our score is 35 points higher than the industry average of 55 percent. An engaged client is one who agrees that it really likes working with us, is likely to continue to work with us, would go out of its way to keep working with us, and will recommend us to its colleagues.

7. Discuss your understanding of the project scope and objectives.

The Scope of Services included in the Economic Development Incentives Analysis proposes that Crowe would assist the City in a comprehensive study that is aligned with the objectives set forth by AdvanceKC.

Crowe would begin the engagement in early Summer 2016 and meet the Fall 2016 deadline set forth by the City. The project scope includes the following tasks that Crowe would complete:

- Analyze significant data points in order to identify lead performance indicators
- Perform a historical analysis of the identified performance indicators, including the quantification of the previous uses of incentives
- Provide a strategy to best carry out implemented policies, monitoring and reporting.

8. Based on your firm’s expertise, please include in your response any additional technical analysis and/services which your firm/team would recommend to ensure successful achievement of the City's project objectives, including why the proposed analysis and/or service is important. These should correspond directly to the Value Added Options described herein.

Crowe would recommend that the relationship between Crowe and the City continues further than the Fall 2016 deadline of the proposed project. In order to effectively monitor and evaluate that the suggested strategy is being properly implemented, Crowe would recommend that they follow up with Kansas City over the long term and assist in any future project needs.

10. Sustainability

The City has adopted an overall policy supporting a greater use of "green solutions" or enhanced sustainability measures that consider environmental quality, social equity and economic vitality. In order to minimize waste, enhance efficiencies, and achieve multiple benefits and project synergies, all City projects must identify opportunities for sustainability improvements and implement those improvements when financially reasonable and operationally practical.

Incorporate sustainability and efficiency into the planning, design, construction, operation and maintenance of the project. Highlight each component of the project that you feel deserves consideration in this context, and demonstrate how sustainability and efficiency are integrated into the project.

If it is not possible to comprehensively integrate significant sustainability measures, then highlight elements you feel deserve consideration in this context.

1. Include a concise summary of your company's policies, strategies, and actions that demonstrate your philosophy and commitment to sustainability.

Sustainability Commitment and Goals

Our Mission

To promote an environmentally conscientious workplace through education, awareness, and partnerships thereby creating eco-friendly practices in which all individuals are able to contribute in ways that make a difference at work, at home, and within the community.

Sustainability matters to us and to our people

We are able to leverage their passion for the environment to continually research ways to increase and promote our green efforts, which creates a culture of environmental stewardship in our local offices. Through this effort, each of our 30 locations is making substantial grassroots contributions towards environmental sustainability. We seek continual improvement and look for additional opportunities in every facet of our business.

Related To Our Core Business Operations

We carefully consider the environment as we manage our business operations and processes, our approach to meetings, and our use of office equipment and break-room supplies.

The manner in which we conduct business and meetings

Many components of our business are conducted in our office locations, reducing the need to travel to our client's location. This places less strain on our client resources, reducing the need to provide workspaces and associated requirements such as power, HVAC, lights, etc.

Many meetings can be conducted via video conference or teleconference. By utilizing these technologies, we are able to reduce travel and our carbon footprint. We also utilize content sharing tools and have invested in audio and video equipment to support virtual collaboration across the firm.

Flexible work arrangements allow some of our people to be productive from any off-site location. This decreases the impact on the environment by avoiding unnecessary commutes and reducing the number of workspaces needed.

Alternative Officing is a program that provides a productive work environment for our staff while reducing our real estate footprint and utility usage. Staff who frequent client locations are not assigned a permanent workspace in their home office. Instead, staff make a workspace reservation when planning to visit an office. Our comprehensive program creates a welcoming and pleasant experience for our people while effectively managing our carbon footprint.

Crowe offers rideshare opportunities through its Carpool database. If travel to another Crowe location is necessary, individuals can consult the Carpool database to identify potential rideshare opportunities to reduce the number of ground travel instances.

Virtual and e-learning training classes are another component of our business we utilize to reduce our environmental impact. By offering classes virtually, we eliminate the need for travel thereby reducing emissions associated with air and ground transportation.

The lifecycle of paper

We are focused on managing and reducing our paper consumption. For these reasons, we have implemented the following guidelines our offices:

Many of our people work with two or more monitors, promoting a paperless environment.

Our copy paper meets the guidelines for the Sustainable Forestry Initiative and our supplier participates in Project Up, a program that aims to reduce environmental impact.

Many of the firm's printing devices are defaulted to duplex printing.

Our national onsite shred vendor recycles all paper. The shredded materials are then processed at a paper mill for pulping. The resulting products are used for paper towels, napkins and tissues.

The use of other office and break-room products

We encourage our people to use reusable glassware, mugs, and silverware. When we do purchase break-room products, we work with suppliers to ensure that our purchasing habits match our environmental conscious commitment. Our suppliers have similar commitments to the environment.

We make a concerted effort to use only recyclable break-room supplies such as coffee cups, plastic-ware, etc.

We strive to purchase environmentally friendly cleaning supplies and to collaborate with our property management teams to use these products as well.

Printer/copier equipment

We have significantly reduced the amount of stand-alone printers that use toner cartridges. Our multifunction printers are on an energy saving setting during the workday and on stand-by after work hours. In addition to significantly reducing the number of printer devices, we recycle printer and toner cartridges.

2. Describe how your Proposal will address the established City policies referenced in this RFP specific to the project or service on which you are proposing.

Crowe's Proposal aligns Kansas City's sustainability efforts along with Crowe's own policies and procedures on sustainability. Crowe intends on executing their "green" efforts in regard to the project through the use of technology.

Technology usage will allow the team members to reduce the amount of travel, the overall carbon footprint, and the consumption of paper. Through the use of technology, meetings and other collaboration efforts between Kansas City, Crowe, and any other participating subcontractors will be able to take place remotely where deemed fit. The ability to work remotely using collaboration tools reduces the amount of time and energy used on traveling, and follows pursuit of "green" efforts. Crowe also intends on following "green" efforts in reducing the amount of total paper produced throughout the project by effectively using technology.

11. Pricing/Cost Proposal

The City recognizes this type of initiative is complex and that proposals may vary greatly in scope, approach, budget, and deliverables from one firm to another. The purpose of this RFQ/P will be to identify a preferred consultant firm/team based on the evaluation criteria contained herein, to work collaboratively with the City and jointly develop a scope of work which will best meet the project objectives outlined above.

Final pricing for this proposal will be negotiated, along with final scope and project phasing with the selected firm, based on their qualifications. However, since relative cost will be one of the evaluation criteria for responses, firms should provide the following information for general comparison purposes.

- Identify in pricing estimate, services or tasks which are necessary to meet the three identified objectives and any optional services or analysis, which are not required but could further enhance the findings of the study.
- Provide a total average hourly rate for your entire firm/team and an estimated minimum number of hours needed to complete each of the three tasks.
- Provide pricing for any additional "value added services" that your firm thinks would be relevant to this request on an a la carte pricing basis.

1. Attach your pricing proposal with the cost breakout as shown above.

See Attachment: KansasCityIncentiveAnalyisProposalBudget.xlsx

12. Employee Eligibility Verification Affidavit

Please download the attached Employee Eligibility Verification Affidavit. Please sign, notarize, and scan the final form below.

1. Please attach the signed and notarized Employee Eligibility Verification Affidavit here. Use the 'paperclip' icon to attach the scanned file.

Employee Eligibility Verification Affidavit.pdf

13. References

Proposers are required to provide three (3) client references, including contact information, for similar projects that the Proposer has completed within the past five (5) years.

It is preferred that at least one (1) client reference be a government sector client.

Instructions:

1. Download the attached References form
2. Distribute to designated references
3. Collect the responses
4. Attach the completed forms below

1. Attach the completed reference form here from Reference #1.

See Attachment: Reference_1.pdf

2. Attach the completed reference form here from Reference #2.

See Attachment: Reference_2.pdf

3. Attach the completed reference form here from Reference #3.

See Attachment: Reference_3.pdf

Please see the attached documents provided in the message portion of the portal due to the character limit in the comment box.

14. Tax Clearance for City and Local Governments

The local governments of City of Kansas City, Jackson County, Missouri; Johnson County, Kansas; and the Unified Government of Wyandotte County/Kansas City, Kansas (collectively the "Local Governments"), have agreed to help enforce each other's Tax Laws to insure that taxpayer funded contracts are performed by Contractors in compliance with the Tax Laws of the Local Governments. Contractor agrees that Contractor shall be in compliance with the Tax Laws of the Local Governments throughout the term of this contract and any contract renewals and that proof of Contractor's compliance with the Tax Laws of the Local Governments shall be a condition precedent to City making City's first payment under the contract or any contract renewal.

The selected Contractor may obtain the City tax clearance letter from the City's Commissioner of Revenue at (816) 513-1135or (816) 513-1089and authorize the City to obtain the Clearance letters from the Local Governments of City of Kansas City, Jackson County, Missouri; Johnson County, Kansas; and the Unified Government of Wyandotte County/Kansas City, Kansas (collectively the "Local Governments"), dated not more than ninety (90) days from the date of submission.

1. Do you acknowledge the requirement in this section?
True

15. Performance Bond

A Performance Bond is required in the amount of the final contract amount.

PERFORMANCE BOND

Project Number
Project Title

KNOW ALL MEN BY THESE PRESENTS: That ____, as PRINCIPAL (CONTRACTOR), and ____, (SURETY), licensed to do business as such in the State of Missouri, hereby bind themselves and their respective heirs, executors, administrators, successors, and assigns unto Kansas City, Missouri, a constitutionally chartered municipal corporation, (OWNER), as obligee, in the penal sum of ____ Dollars ($ __________________) for the payment whereof CONTRACTOR and SURETY bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS,

CONTRACTOR has entered into a Contract with OWNER for__________________________________ which Contract, including any present or future amendment thereto, is incorporated herein by reference and is hereinafter referred to as the Contract.

NOW, THEREFORE, THE CONDITION OF THIS OBLIGATION is such that, if CONTRACTOR shall promptly and faithfully perform said Contract including all duly authorized changes thereto, according to all the terms thereof, including those under which CONTRACTOR agrees to pay legally required wage rates including the prevailing hourly rate of wages in the locality, as determined by the Department of Labor and Industrial Relations or by final judicial determination, for each craft or type of workman required to execute the Contract and, further, shall defend, indemnify, and hold harmless OWNER from all damages, loss and expense occasioned by any failure whatsoever of said CONTRACTOR and SURETY to fully comply with and carry out each and every requirement of the Contract, then this obligation shall be void; otherwise, it shall remain in full force and effect.

WAIVER. That SURETY, for value received, hereby expressly agrees that no change, extension of time, alteration or addition to the terms of the Contract or to the Work to be performed thereunder, shall in any way affect the obligations of this Bond; and it does hereby waive notice of any such change, extension of time, or alteration or addition to the terms of the Contract or the Work to be performed thereunder.

IN WITNESS WHEREOF, the above parties have executed this instrument the ____ day of ____________________, ____.

CONTRACTOR
Name, address and facsimile number of Contractor

I hereby certify that I have authority to execute this document on behalf of Contractor.

By:

Title:

(Attach corporate seal if applicable)

SURETY
Name, address and facsimile number of Surety:

I hereby certify that (1) I have authority to execute this document on behalf of Surety; (2) Surety has an A.M. Best rating of B+, V, or better; (3) Surety is named in the current list of Companies Holding Certificates of Authority as Acceptable Reinsuring Companies: as published in Circular 570 (most current revision) by the Financial Management Service, Surety Bond Branch, U.S. Department of the Treasury; and (4) Surety is duly licensed to issue bonds in the State of Missouri and in the jurisdiction in which the Project is located.

By:

Title:

Date:

(Attach seal and Power of Attorney)

1. Do you acknowledge the performance bond requirement?

True

16. Value Added Options- Cooperative Agreement Submittals

Additional project objectives or deliverables which respondents feel would further enhance the City's utilization of the collected data (historic or future) are encouraged and will also be considered. Additional objectives should be provided in the proposer's response with a description of the associated scope and its benefit and cost.

17. MBE/WBE Goals

Please contact the City's Human Relations Department at 816-513-1836 for assistance on any aspect of the MBE/WBE program.

Program forms are linked below for reference. Click on the form name to download it.

For RFQP submittal, only Form 08 and Form 13 are required. Complete and upload these two forms in the appropriate question below.

If you are short-listed or selected for award, you will be notified of additional documents needed for submission.

- HRD 06 : RFQ/P Instructions
- HRD 07: Instruction for Non-Construction Bids
- HRD 08: Contractor Utilization Plan and Request for Waiver (00450)
- HRD 10: Timetable for Utilization (00460 HRD 10)
- HRD 11: Request for Modification or Substitution (00470)
- HRD 13: Affidavit of Intended Utilization
- 004501.01: Letter of Intent to Subcontract
- 01290.14: Contractor Affidavit for Final Payment
- 01290.15: Subcontractor Affidavit for Final Payment

1. Submit HRD Form 08.

See Attachment: Contractor Utilization Plan Request For Waiver.pdf

2. Submit HRD Form 13.

See Attachment: Affidavit of Intended Utilization.pdf

3. Do you accept this requirement?

True

We have contacted the specific subcontractors listed in the Affidavit of the Indented Utilization. We have received positive correspondence from the respective firms. We are currently in the evaluation process of the selected firms. When we are informed that we have been awarded the contract we will proceed with negotiations and the development of the specific contract terms with the MBE/WBE subcontractors.

18. Addendum 1: Preliminary Questions

Question	Response
What is the budget range for this project?	The City is committed to spending the dollars necessary to deliver a comprehensive analysis. In speaking with the City's procurement staff and other economic development resources, we think that there may be a range of scopes and costs. We have not set a maximum on the budget for this project because we are committed to ensuring we secure a the most effective technical team. We have dealt with the potential for different price points within the responses by requesting responders to provide an average hourly rate and number of hours anticipated to complete the required tasks. That factor would be evaluated against the overall approach and expertise of the responding firm, in recognition that higher expertise may come with a corresponding increase in cost. We encourage any and all firms who think they are qualified to consider a response to our project.
Does Kansas City have an existing relationship with an economic development consulting firm?	The City does not. Our main economic development partner, the Economic Development Corporation of Kansas City, uses SB Friedman and Springsted Incorporated to conduct financial analyses of pending real estate redevelopment projects.
Are you open to hiring a non-local company?	The City is seeking firms with experience conducting similar types of analysis. Whether the selected firm is local or non-local, we require that it comply with the MBE/WBE goals as stated in the RFQ.
What will be the audience for this report?	The audience for this report includes City staff, Mayor & City Council, the Economic Development Corporation of Kansas City and the redevelopment agencies it houses, local neighborhood groups, the development community, and the broader public. The expectation is that this report will be made public.
What "temporary staffing resources" will be available, as listed in the description?	The City will have summer interns entering the data and information from the statutory incentive agencies into a database. The goal is to limit the amount of data compilation that the selected firm would need to do, so that firm can focus predominantly on data analysis. However, once a firm is selected, the City will work with that firm to compile the data necessary for the firm to complete the agreed upon scope of work.
Which incentive programs are included in the scope?	The City's Economic Development Agencies for the purpose of this study include - the Land Clearance for Redevelopment Authority (LCRA), the Tax Increment Financing Commission (TIF Commission), the Downtown Economic Stimulus Authority (DESA), the Enhanced Enterprise Zone Boards (EEZ), the Planned Industrial Expansion Authority (PIEA) and the Kansas City Chapter 353 Advisory

	Board (353 Board) which administer programs for their respective programs. Additionally, the City directly and via the Economic Development Corporation of Kansas City, the umbrella economic development agency for the City, and the Port Authority have additional authority to convey certain economic incentive benefits authorized pursuant to other Missouri State Statutes including Chapter 100 and Chapter 353.
Is the listed MBE/WBE percentage required or a soft goal?	The percentages are based on the scope of work. The City desires that City certified Minority Business Enterprises (MBEs) and City certified Women Business Enterprises (WBEs) have a maximum opportunity to participate in the performance of City contracts. This RFQ/P requires 10% DBE/MBE participation and 5% WBE participation. MBE/WBE firms can be found at https://kcmohrd.mwdbe.com/FrontEnd/VendorSearchPublic.asp?TN=kcmohrd&XID=186.
Does Kansas City recognize MBE/WBE certification in other cities?	The City of Kansas City, MO only recognizes MBE/WBE certification from Kansas City. For a list of certified firms, please search https://kcmohrd.mwdbe.com/FrontEnd/VendorSearchPublic.asp?TN=kcmohrd&XID=186.
Does the scope include recommendations to improve the performance?	The scope does not include policy recommendations. Given that many other cities are grappling with similar questions and conducting similar analyses, our scope does seek input as to best practices for administration, monitoring, and reporting of incentives.
When is the pre-submittal teleconference?	The pre-submittal teleconference is Tuesday, June 7th at 10am (CT). Instructions on how to call in and participate will be sent out to interested firms at a later date.

1. Do you acknowledge this addendum?

True

19. Addendum 2: Pre-Submittal Teleconference Instructions

The City will conduct a pre-submittal teleconference at 10am CT on Tuesday, June 7th to go through the RFQ/P and answer any questions from potential respondents. Access to the meeting will be two-pronged: to view the slide deck, you will need to join the Skype meeting via the invite below. In order to ask questions and participate on the call, please use the dial in number.

Contact Aaron Shroyer (aaron.shroyer@kcmo.org; 816-513-6537) if you have any questions.

Join Skype Meeting

For dialing-in:

1.Dial one of the numbers listed below
2. When prompted, enter the Meeting Access Code: 9689153#
* Caller-Paid number: 213-787-0529
* Toll-Free Number (in USA): 888-808-6929.
* Blackberry (Caller-Paid): 2137870529x9689153#
* iPhone (Caller-Paid): 2137870529,,9689153#

1. Do you acknowledge this addendum?

Yes

20. Addendum 3: Post-Teleconference Questions and Responses

Questions	Responses
Are you looking for submissions from all of the team member firms on a proposal or only from the lead firm?	If several suppliers are creating a joint proposal, only the lead proposer would submit in RFP365. However, please provide information on all proposers in Section 1.
Does the reference to Dun & Bradstreet in this section and item refer to a D&B number or a D&B credit report?	Yes, firms can supply their D&B number, and the City can run the report.
Which e-Verify form should be submitted?	It is fine to submit the e-Verify form that is attached in RFP365.
Where can I	Please find that list at

find the list of certified MBE/WBE?	https://kcmohrd.mwdbe.com/FrontEnd/VendorSearchPublic.asp?TN=kcmohrd&XID=186.
Why does the City ask for a performance bond?	We are asking for a performance bond to secure the performance of the selected firm's services through the entirety of the project. It will be released at the end (acceptance) of the project. We ask for this on all of our large services projects to guarantee the services.
Would there be any exceptions for submitting the completed reference forms past the due date of June 12th?	References are a requirement and all suppliers should make every effort to meet all requirements of the RFP.

1. Do you acknowledge this addendum?

Yes

2. Do you acknowledge this addendum?

21. Addendum 4: Additional Information on Incentive Programs

Data Fields TIF Generational Chart Chapter 100 - Super TIF Projects Incentive Areas.pdfIncentive Areas.xlsx Zone 1 Map.PDFZone 2 Map.PDF Zone 3 Map.PDF

Attached to this Addenda are the following:

- DataFields: shows the types of data that will be captured in our database. Note: Data is currently being entered and not all incentive projects will have data in every one of the listed fields.
- TIF Generational Chart: Breakdown of generations of TIF, as noted by Kerrie Tyndall during Tuesday's phone call.
- Chapter 100- Super TIF Projects: List of all Chapter 100 & Super TIF Projects.
- Incentive Areas: Map and list of all incentive areas.
- Zones 1-3: Map of Enhanced Enterprise Zones in Kansas City, Missouri

1. Do you acknowledge this Addendum?

Yes

22. Addendum 5: Urgent Notice to Respondents

URGENT NOTICE TO RESPONDENTS

The deadline for responses has been extended to 5pm CT on Thursday, June 16th.

As a result, the schedule for selection will be altered as follows:
Question Period: Two weeks after close (SAME)
Short-listed Firm Interviews: Late June/Early July 2016
Preferred Firm Selected: July 2016
Finalize the Scope & Pricing: July 2016
Project Commencement: Late July 2016
Project Completion Date: Fall 2016

Can the City provide an overview of the economic incentive programs?	See attached Word document entitled Quick Reference Guide.
In regard to the Standard City Contract, is there any flexiblity with regard to contract negotiation? How	Question 2 in Section 5 is provided to allow for any comments, concerns, or questions regarding the Standard City Contract. Some things may be negotiable and others may not. If you have exceptions to any specific sections, please explicitly state those in your response.

would you advise that firms answer the questions with our proposed changes?	
Would it be acceptable to add additional scope to the proposal as a "value-added task" that would count towards MBE/WBE goals?	Per Section 3-431 (City Code 130041) the Bidder/Proposer can include additional scopes for participation and count that participation towards the project's MBE/WBE goal. This is acceptable because a contract that cannot achieve participation as it written can be structured to CREATE potential opportunities for qualified MBEs and WBEs to participate as subcontractors, service providers and/or suppliers, Section 3-431(b)(3) of our policy allows that as an acceptable option. If the Bidder/Proposer is unable to meet the target goals, they must submit documentation of their Good Faith Efforts in accord with Section 3-441. The Standards to determine good faith are attached for your convenience.
Is the deadline to complete the project firm?	The City is seeking to complete this analysis by the Fall of 2016. However, if the responder feels that this timeline is insufficient to meet the intention of the outlined scope of services, they should indicate what portion of the scope could be completed by this fall and include an alternative schedule for completion of the project including any related phasing. The City's emphasis is on receiving a high-quality product as soon as possible.
Are respondents required to rely upon data fields provided to complete the analysis?	No, Task 1 of the scope is intended to allow for proposals to identify their data requirements and scope and use that to negotiate a plan to compile that data. The data that firms can use is not limited to the data that is currently collected. The City welcomes inputs from the selected firm as to what data can be included. The City will work with partners to collect that data, with the caveat being that some historical data might not be available.

Quick Reference Guide.doc
130041 MWBE GFE Standards.pdf

1. Do you acknowledge this Addendum?

Yes

Kansas City Proposal Costs	Uminski Hours	Tarney Hours	Salsbury Hours	Armitage Hours	Krueger Hours	Wall Hours	Frierson Hours	Adam Hours	McFetridge Hours	Total Crowe Hours	Subcontractor Budget	Budgeted
1. Planning and Initiation	10	10	5	5	5	5	5	5	5	**55**		**$ 16,700.00**
2. Research and Data Collection			5	45	45	45			40	**180**		**$ 21,625.00**
3. Analyze/Identify Essential Data Points and then Determine Key Performance Indicators	10	5	5	30	30	30	10	12	20	**152**		**$ 27,395.00**
4. Analyze Multiple Tiers of Incentives and Develop Evaluation of Historic Use	5	5	15	20	20	20		23	20	**128**		**$ 21,605.00**
5. Observe/Collect Data from Current Incentive Practices	5		10	25	25	25	5	10	20	**125**		**$ 18,975.00**
6. Analyze Current Incentive Practices		10	15	10	10	10	5	10	10	**80**		**$ 15,725.00**
7. Develop Action Plans for Implementation	5	10	10	15	15	15	5	5	5	**85**		**$ 17,950.00**
8. Finalize Best Practices Initiative	5	10	10	15	15	15		10	15	**95**		**$ 18,775.00**
9. Monitor and Evaluate	5	5	10	10	10	10				**50**		**$ 10,425.00**
Total Subcontractor Budget											**$ 20,000.00**	**$ 20,000.00**
Total Hours/Budget	**45**	**55**	**85**	**175**	**175**	**175**	**30**	**75**	**135**	**950**	**$ 20,000.00**	**$ 189,175.00**