EV2228 Economic Development Incentives Analysis

Christopher Steele

06/02/2016

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.

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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.

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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.

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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.

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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

We have read and understand the above instructions and conditions

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.

<u>Task 2 - Complete a Historical Analysis of Key Performance Indicators</u>

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

We agree with the scope of services. Our approach, experience, and tools are contained elsewhere in this submission.

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

False

We have no concerns of issues with the requested scope

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

Christopher Steele, COO, Investment Consulting Associates NA, LLC

3. Authorized Representative phone number and email address

617.314.6527 chris@ic-associates.com

4. Firm's name and physical address

Investment Consulting Associates NA, LLC
2345 Washington St, #201
Newton, MA 02462

5. Email address for Purchase Order

chris@ic-associates.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

Yes we will

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

The only question we have regards the performance bond. While we are familiar with the tool, we are not familiar with it being applied to professional services contracts. We do not see any particular difficulty, but would want to explore the purpose for the bond.

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.

Investment Consulting Associates NA, LLC
2345 Washington St, #201
Newton Lower Falls, MA 02462
Phone: 617.314.6527
Fax: 617.507.8560
Email: chris@ic-associates
Federal ID#: 26-4390465
Website: www.ic-associates.com

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

We at Investment Consulting Associates have assembled a uniquely qualified team to address the Kansas City's incentive evaluation needs.The team includes experts on location strategy, incentive policy design, stakeholder engagement, project management, and economic analysis.The assembled team also provides the benefit of global expertise and local Kansas City presence and knowledge.

Description of Investment Consulting Associates (ICA)

Investment Consulting Associates (ICA) North America began business as CWS Consulting Group, LLC, which was founded in Massachusetts in March of 2009.As of January 2013, CWS Consulting Group merged into Investment Consulting Associates, BV, and became the North American operation for ICA. While this Trans-Atlantic setting provides the extended team with direct knowledge of global changes in location strategy, we marry this with extensive experience immediately relevant to the opportunities and environment in which the State of Maine competes.Further, our national and international experience provides insight into future opportunities and strategies which the State may wish to adopt.

ICA is an independent supplier of location advisory services including corporate site selection and supply chain optimization as well as incentives advisory, free zone development, economic development strategy, and FDI advisory for local, regional, and national governmental agencies. Our two flagship software products ICAincentives.com and LocationSelector.com provide ICA with a competitive edge over our competitors.

Through a combination of consulting and smart software tools and distinctive and committed service delivery, we differentiate our service with the following factors:

- ICA characterizes itself through a blend and competitive mix of practitioners' academic and policy experience in location selection, competitive analysis, research, and foreign direct investment (FDI) advisory and software development.This combination makes our business proposition unique.
- The team of Sr. Associates of ICA has over 65 years of combined experience in advising multinational corporations and small- and medium-sized enterprises in their international

investment, strategic location decisions, incentive maximization, as well as supply chain optimization strategies.
- On average, our staff has at least two decades of experience in the field bringing in a high level of service delivery and quality standards combined with an independent view.
- ICA has a physical office presence in Boston, New York, Amsterdam, Brazil, and India providing local knowledge, expertise, research assistance and on-the-ground support in implementation phases as well as excellent insight into developing trends that can impact our clients.
- We are an independent provider of consulting and training services to corporate and government decision makers, supported by ICA proprietary software solutions.
- We fully understand the relationship between corporate strategy, supply chain management, role of incentives and international investment.The benefits of our advice include considerable cost savings, while maintaining or increasing customer service levels.
- ICA is part of the Consultative Advisory Group of the World Association of Investment Promotion Agencies (WAIPA).
- ICA is part of the committee on Policy Framework for Investment (PFI) at the OECD.
- ICA is advisor to the annual World Investment Report of UNCTAD.
- ICA has alliances with Harvard Business School and the John F. Kennedy School of Government, Columbia University, St. Gallen MBA University, Texas A&M University, Rotterdam School of Management (RSM), Nyenrode Business School (*Nyenrode Centre for Competitiveness* - *NIC*) and the Maastricht School of Management (MSM).
- ICA has developed IncentivesMonitor.com, which is the first global incentive deal database that tracks information on all major financial subsidies and incentives.The database currently includes 15,000+ site selection and investment projects with full disclosure of the incentive details (i.e. amount, type, program, and project details).
- As a result of its location strategy and incentives review research, ICA has increasingly been working with public sector clients to help them design more effective, responsible, transparent, and accountable incentive programs. Such programs both meet specific business and economic development needs and show a true, measurable return on investment for the public sector.

Description of Global Prairie

Launched in 2008, Global Prairie is a full-service marketing firm dedicated to cultivating a healthier world. We develop impactful marketing solutions through the strategic integration of compelling content and communications channels exclusively for clients whose businesses improve the health of people, animals, the environment and our community. But what really excites - and unites - us is our desire to give back. To this end, Global Prairie is proud to donate 10% of our profits annually to organizations making a positive impact in the world. Since our founding, we have donated more than $5 million in money and volunteer time to the causes that our people and our clients are passionate about.

Global Prairie has attracted a world-class team, who in turn, has attracted many of the world's most enduring and lasting brands to our portfolio. Our team is a diverse mix of creative individuals from the worlds of advertising, technology, design and marketing. We plan, develop and execute integrated, creative strategies across all media. Our work is largely focused on quality of life sectors (human health, animal health, plant sciences, CPG/food, energy, sustainability and philanthropy) with the goal of not only ensuring our clients' bottom-line success, but also making an impact on quality of life in our communities.

Global Prairie's specialized services include:

- Advertising
- Branding
- Design
- Digital Strategy and Development
- Medical / Scientific Communications
- Meetings and Events Management
- Grassroots, Guerilla and Experiential Marketing
- Market Research: Quantitative and Qualitative
- Public Affairs
- SEO / SEM
- Social Media / Social Business
- Measurement and Analytics

Description of Shockey Consulting Services, LLC

Shockey Consulting Services, LLC, provides award-winning management, planning and public participation consulting services to federal, regional, state, and local governments and other public agencies. The firm was founded in 1998 and is headquartered in Lenexa, Kansas with an office in the St. Louis, Missouri region. A group of dedicated and talented professionals with diverse backgrounds make up the Shockey team.We have former government managers, strategic planners, environmental scientists, urban planners and communications specialists. We enjoy working with people dedicated to making their communities a better place. We specialize in facilitating difficult conversations involving diverse stakeholder perspectives.

Shockey's core competencies include:

- Planning quality places and communities;
- Setting budget, capital, organizational, and community priorities;
- Developing new programs;
- Improving existing programs;
- Securing new sources of revenue;
- Complying with regulations;
- Measuring program performance; and
- Educating and involving the public.

Shockey Consulting Services, LLC, was named a Top 25 Under 25 small business by Thinking Bigger Business Media Inc. in 2015. Shockey is a certified small business, disadvantaged business, and women-owned business.

Description of Bellewether, Ltd.

Founded in 1994, Bellewether is an organization consultancy providing supportive services including process structures, analysis and training to align client goals to measurable outcomes. Often, our work includes closing process gaps to increase efficiencies that create smoother hand offs and better communication. Bellewether, Ltd. advisors strengthen the practice structure of customer organizations or projects through gap analysis, best practice alignment and the development of policies, processes and standard operating procedures that enhance productivity. This work increases organizational performance and bottom line profit.

Bellwether's core competencies include:

- Business Operations and Strategic Program Management
- Project Management
- Gap Analysis, Research and Evaluation of Critical Data Points
- Process Design and Organizational Structures
- Human Performance and Group Dynamics
- Curriculum design, Development and Delivery
- Multicultural Training Development and Delivery

Our client initiatives have supported commercial and public sector organizations, including many state and federal agencies. Bellewether has a core team of 7 and has developed a network for additional expertise as needed.

Our clients come from a broad range of business sectors that include: public, private and non-profit entities across the United States. Our experience includes projects in over 20 industries that include utilities, aerospace, financial, healthcare, education and construction industries, municipalities, state and federal government.

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

ICA is an independent supplier of location advisory solutions for corporate and governmental clients on the local, regional, and national level. Our services include:

- Corporate site selection
- Supply chain optimization
- Incentives advisory
- Economic development strategy
- Free zone development

- FDI advisory

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

ICA

- 5 full time staff
  - 2 staff in Newton, MA
  - 3 staff in Amsterdam, NL
- 15 senior associates worldwide

Bellewether

- 7 staff
- All in Kansas City, MO Area

Shockey

- 14 staff
- 13 in Kansas City, MO Area

Global Prairie

- 100 staff
- 40 in Kansas City, MO Area

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

Investment Consulting Associates NA, LLC is a Massachusetts Limited Liability Corporation.

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

ICA has fully completed the agreed scope of services in each and every case for which we have been issued a contract.

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?

There are no civil or criminal actions pending against ICA, nor have there ever been in the past.

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.

We have not been a party to any litigation, arbitration, and/or mediation cases.

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

ICA has never been disqualified from working for the City of Kansas City nor with any other public entity.

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

ICA Financial Performance 2013-2015.pdf Investment Consulting Associates is a robust and stable business concern. We have attached the P&L statements from 2013 (when we first began operations as part of the global ICA firm) through 2015.

As a small firm, we do not keep audited statements, and were advised on the Q&A call on June 7 that if audited statements were not available we should provide out P&L statements as available. Our D&B (DUNS) number is 01 318 1117

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

Maine Department of Economic and Community Development (DECD)

1. Assigned Personnel:

- Dr. Douglas van den Berghe, CEO of ICA
- Mr. Christopher Steele, President North America at ICA
- Mr. Laurens van der Schoor, Incentives and Free Zones Advisor at ICA

2. Scope of Services:

1. Task 1 - Comprehensive Evaluation of State Investments in Research and Development
2. Task 2 - Comprehensive Evaluation of State Investments in Economic Development
3. Task 3 - Overall Evaluation Report
4. Task 4 - Implementation: Work Plan
5. Task 5 - Economic Impact within the State of Maine

3. Contract Amount: $1,025,000

4. **Summary of Services:** ICA worked with the Department of Economic and Community Development

to create a comprehensive R&D Biennial Progress Report, as well as an Evaluation of Investments in Economic Development.Deliverables included biannual reports, one due in February and an overall evaluation report due in May.ICA conducted close to 60 interviews, ran several cost models, a reverse site selection model, several benchmarking studies, and more.The project also includes ongoing testimony in front of various State Legislature groups. It should be noted that the DECD is a state government department, so the project evaluated all statewide incentive (58 in total).

5. Client Contact Information:
Mr. Brian Whitney, Director of Business Development & Innovation

Maine Department of Economic & Community Development (DECD)

(207) 624-9804

bwhitney@mainetechnology.org

2. Relevant contract description #2

Rebuilding Renewal: Analysis of State Investment in Gateway Cities

1. Assigned Personnel:

- Mr. Dan Hodge, Senior Associate at ICA

2. Scope of Services:

- Research State Investment in Gateway Cities
- Compare Real Estate Development trends with City of Boston
- Outline Suggestions for Development
- Case Study - Worcester's City Square
- Case Study - New York state's Upstate Revitalization Initiative
- Compile Final Report

3. Contract Amount: $10,000

4. Summary of Services: Working with MassINC's Gateway Cities Innovation Institute, Dan Hodge authored a research report analyzing the economically distressed small to medium-sized cities in Massachusetts known as Gateway Cities.In particular, he examined state investment in Gateway Cities, assessed real estate development trends compared to Boston (which showed Gateway Cities not participating in economic recovery), and outlined ideas to enhance transformative development.He authored case studies of Worcester's City Square and New York state's Upstate Revitalization Initiative to showcase examples of catalytic investment that are leading to significant private sector investment.The report found that while Massachusetts is investing disproportionately in Gateway Cities, these investments are: a) dominated by education spending; b) there are few examples of larger-scale investments that can logically be connected to generating transformative development; and c) the state does not (yet) track investment or evaluate impact. Despite an infusion of programs and focus on the state's small to medium sized cities, the real estate development trends point to a widening gap with Boston, with building permits and property values still below pre-recession levels.The report acknowledges and supports the fairly recent set of strategies for Gateway City renewal that has fused under the Transformative Development Initiative, and recommends a mix of higher state investment levels, stronger alignment of investment with targeted redevelopment strategies, and an increase in transparency and accountability.The report can be found at: http://massinc.org/research/rebuilding-renewal/

5. Client Contact Information:

MassINC, Gateway Cities Innovation Institute

Mr. Ben Forman, Research Director

(617) 224-1652 office

(617) 922-1621 cell

bforman@massinc.org

3. Relevant contract description #3

Renewing Energy

1. Assigned Personnel (Global Prairie):

- Ms. Julie Gibson, Account Director at Global Prairie
- Ms. Anne D. St. Peter, Founder of Global Prairie
- Ms. Lauren Johnson, Director of Research + Insight at Global Prairie
- Mr. Alex Wendel, Account Director at Global Prairie

2. Scope of Services:

- Strategic Counsel
- Marketing Communications
- Advertising
- Public Affairs

3. Contract Amount: N/A

4. Summary of Services: Since 2011, Global Prairie has worked closely with Google Fiber as they have built out their ultra-high-speed fiber network in Kansas City. Google initially engaged Global Prairie to help manage their initial Kansas City announcements. Since then, we've worked closely with the Google Fiber team and continue to provide support to all areas of the project, including overall positioning, product marketing, community relations, public affairs and media relations. We are also working closely with Google on how to address the digital divide in Kansas City, focusing on the power of community-based philanthropy through the launch of the Kansas City Digital Inclusion Fund. Today, Google Fiber is completely changing the way Kansas City accesses, shares and thinks about information online.

For almost 12 years, members of Global Prairie's team have provided communications counsel and marketing support to KCP&L, and as the company's needs have changed, so too has our role. What started as a traditional corporate communications and reputation management engagement has evolved into a full-fledged marketing partnership across a variety of advertising channels, including digital, print and broadcast. KCP&L and Global Prairie have launched a variety of marketing campaigns and initiatives intended to increase customer engagement and raise overall brand visibility, particularly for the company's sustainability efforts. Ranging from energy efficiency product offerings, to video contests to the launch of the KCP&L Facebook page, these have all proven extremely successful, further reinforcing KCP&L's position as one of Kansas City's most widely respected and highly regarded companies.

5. Client Contact Information:

Chuck Caisley

KCP&L

(816) 556-2320

Chuck.Caisley@kcpl.com

4. Relevant contract description #4

Moving Kansas City Forward

1. Assigned Personnel (Global Prairie):

- Ms. Julie Gibson, Account Director at Global Prairie
- Ms. Anne D. St. Peter, Founder of Global Prairie
- Ms. Lauren Johnson, Director of Research + Insight at Global Prairie
- Mr. Alex Wendel, Account Director at Global Prairie

2. Scope of Services:

- Strategic Communications
- Stakeholder & Community Outreach
- Earned Media
- Digital and Social Media

3. **Contract Amount:** $35,000 per Campaign

4. Summary of Services: Global Prairie has been part of the team responsible for advancing a number of ballot measures intended to move Kansas City forward. Working with Mayor Sly James' chief political consultant, Global Prairie has provided strategic communications counsel and public relations support to the following initiatives:

Summer 2012/Fall 2012 - Downtown Streetcar Transportation Development District (TDD): The voter-approved Downtown Kansas City Streetcar project consists of a two-mile starter line running on Main Street between River Market and Crown Center. Working with the campaign team, Global Prairie helped to develop messaging for the two elections, first to establish the TDD and then to approve the funding mechanism. Where previous light rail plans failed for being too expensive or too complicated, this plan was focused in an area where support for transit has been historically strong. In addition, the project was positioned as a starter line, designed to eventually increase in size and scope. Global Prairie served as the primary media point of contact for both elections, which passed with overwhelming support.

August 7, 2012 - Question 1 & 2 - Parks/Streets/Water: When Kansas City voters were asked to decide on Question 1 and 2, Global Prairie worked on overall campaign strategy and messaging, including material development, social media and media outreach. Question 1 discontinued a number of property taxes and fees and replaced them with a one-half cent sales tax to fund Kansas City parks as well as street maintenance. Question 2 asked for approval to issue $500 million in revenue bonds for the purpose of extending and improving the sanitary sewer system of the City, including compliance with the federally mandated Consent Decree for the Overflow Control Program. Both measures were approved by voters on August 7, 2012, and received strong support North of the River and in urban core neighborhoods, despite initial research indicating otherwise.

April 2, 2013 - Question 1 - Health Levy: On April 2, 2013, Kansas City voters approved Question 1, renewed the approximately one-third of Kansas City's Health Levy that was set to expire in 2014. The Health Levy is an important investment for the city because it helps offset the costs of uninsured and underinsured patients while keeping health care costs lower for the rest of us. Funds from the Health Levy are used to support Truman Medical Center, neighborhood safety net providers and ambulance service across the City.Global Prairie developed campaign messaging and materials and served as the campaign's media contact.

5. Client Contact Information:

Larry Jacob

CURRENT: Kauffman Foundation (FORMER: The Dover Group)

(816) 308-8703

larryjacobjr@gmail.com

5. Relevant contract description #5

City of Roanoke, VA

1. Assigned Personnel:

- Mr. Christopher Steele, President North America at ICA
- Mr. Laurens van der Schoor, Incentives and Free Zone Advisor at ICA

2. Scope of Services:

- Task 1 - Compile and Refine Current Plans
- Task 2 - Define Future Uses for Brownfields
- Task 3 - Plan for Reuse of Infrastructure
- Task 4 - Policy and Strategy for Reuse
- Task 5 - Implementation Steps and Resources
- Task 6 - Compile Area-Wide Plan

3. Contract Amount: $110,000

4. **Summary of Services:** CWS Consulting Group (now Investment Consulting Associates) led a team to construct a plan for rehabilitating and redeveloping the neighborhoods of Roanoke directly adjacent to the Norfolk Southern yards west of downtown.

The team implemented an approach that married "reverse site selection" knowledge of how end-users make location decisions with the environmental and financial knowledge of how to remediate brownfield properties. The CWS project manager was responsible for overall project delivery and for managing the five firms who made up the project team.

Our team played an essential role in identifying and reaching out to the affected neighborhood groups to ensure that their input was included and that they were owners of the eventual plan. As a result, the project not only examined public policy and business attraction issues, but will also directly included voices from the adjacent neighborhood groups and other interested parties. The resulting plan included components for industrial, commercial, community, residential, and other uses.

This project also included a heavy GIS component that required a large amount of information from many sources to be merged on the almost 1400 parcels within the rail corridor. An ArcGIS.com project website was utilized to share the GIS data progress with the client. Many graphics were also designed and generated through GIS including maps focusing on the entire rail corridor as well as maps focusing on each of the target areas evaluated during the project. The project deliverables included a final report, the GIS parcel shapefile, the GIS "Database," and the report CD.

5. **Client Contact Information:**

Mr. BT Fitzpatrick, Former Roanoke City Planner/GIS Technician at the County of Planning Offices

Currently: GIS Client Advocate at Anderson and Associates, Inc.

(540) 552-5592

fitzpatrick@andassoc.com

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

Please find attached a copy of the contract between our firm and Wayne County, NY. Investment Consulting 2015 (Final).pdf

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.

Public Contracts Fulfilled by ICA

Stamford Bus and Shuttle Survey (CT)

(Subcontracted under Fitzgerald & Halliday, Inc.)

1. Contract Amount: $20,000

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Scope of Services: ICA was subcontracted under Fitzgerald & Halliday, Inc. to assist the Western Connecticut Council of Governments conduct a Bus and Shuttle Survey for the Stamford Transportation Center. After conducting intensive interviews with business employers and completing numerous case studies, ICA was able to demonstrate how private shuttle services impacted the labor shed of the community. Transportation was seen as a key barrier for finding and keeping a job, thus employers were willing to endure the cost of running the service as a means of labor attraction and retention.

4. Client Contact Information:

- Chris Henry
- Fitzgerald & Halliday, Inc.

- 917-933-7442
- chenry@fhiplan.com

Coryell County Economic Development and Marketing Plan (TX)

(Subcontracted under Yanofsky Associates)

1. Contract Amount: $14,070

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA was subcontracted under Yanofsky Associates to assist Coryell County conduct a comprehensive analysis of its competitive position and to strategize key industries to pursue, considering the county's labor force. ICA conducted analyses of Location Quotients, Shift Shares, Economic Development Incentives, and Reverse Site Selection, as well as contributing to a final Action Plan.

4. Client Contact Information:

- Susan Yanofsky
- Yanofsky Associates
- 214-489-7959
- susan@yanofsky-consulting.com

City of Ocala Feasibility of Inland Freight and Logistics Center Project (FL)

(Subcontracted under Parsons Brinckerhoff, Inc.)

1. Contract Amount: $24,900

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA subcontracted under Parsons Brinckerhoff, Inc. to assist the City of Ocala identify its logistical advantages and market context, demonstrate commodity flows and the City's market potential, and finally outline development requirements. This included identifying alternative sites and conducting an initial feasibility assessment before completing an in-depth site analysis for the City's preferred site. ICA conducted Ocala's competitive analysis specifically with regards to location screening, and also directed a series of interviews with businesses operating freight functions out of Ocala.

4. Client Contact Information:

- Michelle Kendall
- Parsons Brinckerhoff, Inc.
- Office: 407-587-7806
- Cell: 615-290-0091
- kendall@pbworld.com

Elkhart County Economic Development Study and Action Plan (IN)

1. Contract Amount: $35,000

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA was called in to identify the specific risks to the County's economic base and build a plan for the EDC to re-align its efforts to build economic resiliency and sustainability. We helped to identify real opportunities of economic opportunity that the County can attract and support based on its heritage and workforce, and worked with the EDC to make initial inroads to decision makers. Additionally, ICA preformed a website review and cited recommended changes on all major Economic Development websites within Elkhart County.

4. Client Contact Information:

- Denise Hoke
- Economic Development Corporation of Elkhard County
- Office: 574-293-5627
- Denise@elkhartcountybiz.com

Northampton County Department of Economic Development (VA)

1. Contract Amount: $6,500

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA was retained by the Northampton County Department of Economic Development to do a market and location review, followed by a competitive analysis of the area. The ICA team created a database of locationally relevant data (in matrix format) of Northampton County and its six top competitors. The accompanying report contained a SWOT Analysis, strategic measures for target industries, and an Action Plan for the County.

4. Client Contact Information:

- Charles McSwain
- Formerly at Northampton County Department of Economic Development
- Currently at Charles McSwain Consulting
- Office: 904-607-3231
- charlesmcswain@gmail.com

Town of Natick Targeted Economic Development Action Plan (MA)

(Ongoing)

1. Contract Amount: $38,440

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: The Town of Natick has retained ICA to produce a Targeted Economic Development Action Plan that will produce a baseline analysis of the Town's economic development position as well as offer tactical recommendations for how Natick can retain and enhance its existing economic development competitiveness. ICA will incorporate a multitude of methods, including Location Quotients, Shift Shares, Reverse Site Selection Models, and interviews.

4. Client Contact Information:

- James Errickson
- Town of Natick Community and Economic Development
- Office: 508-647-6450
- jerrickson@natickma.org

Columbus Region Logistics Council Strategic Plan (OH)

1. Contract Amount: $109,000

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA was retained by Columbus Region Logistics Council to update its

Strategic Plan, while also reviewing the Council itself to ensure it aligned with the updated Strategic Plan. ICA completed a 3-Phase project, achieving the following: Data and Freight Review, Business and Economic Development Review and Planning (including Reverse Site Selection Analysis), and finally the Economic Development Plan itself.

4. Client Contact Information:

- Jeff Zimmerman
- Columbus Region Logistics Council
- 614-225-6086
- jeffzimmerman@columbus.org

Wayne County Opportunity Analysis and Marketing Strategy (NY)

1. Contract Amount: $155,960

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: ICA partnered with Conway PR & Marketing to combine top-notch economic development analysis with coherent communication and marketing for Wayne County's Economic Development and Planning Department. Within the Strategic Analysis, ICA examined Location Quotients, Shift Shares, and Reverse Site Selection Models while detailing a SWOT Analysis and Action Plan comprehensible with the marketing strategy created by Conway.

4. Client Contact Information:

- Bob McNary
- Wayne County Economic Development and Planning Department
- 315-946-5919
- wedcny@co.wayne.ny.us

Edmonton International Airport Economic Development and Business Attraction (Alberta, Canada)

1. Contract Amount: $38,390

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: Edmonton International Airport (EIA) retained ICA in order to better understand the types of industries that would find its real estate desirable, and to develop a plan aimed at developing its real estate accordingly. After analyzing key economic indicators and using a location screening model, ICA was able to identify which industries would be best targeted by EIA and also outlined specific steps to be taken in order to achieve its goals.

4. Client Contact Information:

- Geoff Herdman
- Edmonton Regional Airports Authority
- Office: 780-890-2414
- gherdman@flyeia.com

Michigan Economic Development Corporation Logistics and Supply Chain Asset Study (MI)

(Subcontracted under Parsons Brinckerhoff, Inc.)

1. Contract Amount: $85,000

2. Contract Terms: Fixed Fee for Scope of Work

3. Summary of Services: Subcontracting under Parsons Brinckherhoff, Inc., ICA was responsible for the Development Opportunities and Economic Benefits portion of the Logistics and Supply Chain Asset Study done for the Michigan Economic Development Corporation. ICA conducted a business environment review, business and stakeholder interviews, and an opportunity match grid.

4. Client Contact Information:

- Joe Bryan
- Parsons Brinckerhoff, Inc.
- Office: 617-426-7330
- Mobile: 617-496-0127
- bryanjg@pbworld.com

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.

Between our staff and that of our partner firms, we have ample staff expertise and capacity to meet the project needs within the timeframe requested by the City of Kansas City.

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.]

Key employees by firm for this project are as follows:

Investment Consulting Associates

- Chris Steele
- Dan Hodge
- Collin Perciballi
- Douglas van den Berghe
- Laurens van der Schoor

Global Prairie

- Julie Gibson
- Ann St. Peter
- Lauren Johnson

Bellewether

- Kay Saunders
- Jami Henry
- Kerri VanMeveren

Shockey

- Sheila Shockey
- Erin Ollig
- Beth Quindry

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.

Investment Consulting Associates

Chris Steele

- Position: COO & North America
- Years with the Firm:7
- City and State of Residence:Newton, MA
- Time Commitment on Other Accounts:
- State of Maine - 5%
- Town of Natick - 15%

Academic Qualifications: BA in Psychology and Chemistry, Rutgers College; MRP in Land Use Planning and Real Estate Development, University of North Carolina at Chapel Hill

In his over 20 years of work in location advisory, Chris used his insights and experience to help communities the world over better understand how companies make location decisions.He has then used this insight to help communities build economic development and investment attraction policies that appropriately balance community goals, workforce development, value chain enhancement, and incentive & inducement policies to effectively build economic sustainability.

Clients have included the Province of British Columbia, the States of Delaware and Arkansas, and communities in the regions of Tampa, FL; West Palm Beach, FL; Pittsburgh, PA; Kansas City, MO/KS; Hartford, CT; New Orleans, LA; Gary, IN and elsewhere.

Professional Background

- Founded CWS Consulting Group in 2009, merged firm with ICA in 2013

Previous experience includes:

- TranSystems - Director of Real Estate Development (2007-2009)
- ADP Mintax - Director of Location Advisory Services (2006-2007)

- Ernst & Young - Location Advisory Services (New York and Boston 1994-2005)
- Over 25 years of experience in location and site selection consultancy and Foreign Direct Investment (FDI) advisory
- Global corporate real estate and economic development experience with specific concentrations throughout North America and Western Europe

Capabilities

- Over 20 years consulting, project managing, and directly advising clients on how location factors impact their business
- Helped to develop Ernst & Young's location screening model as well as all location modules of the firm's Integrated Corporate Real Estate Solutions (InCREAS) offering
- Visiting professor at UMass Dartmouth and Boston on Real Estate and Regional Economic Development
- Frequent author on location strategy, economic development, business attraction and real estate development issues, particularly for *Area Development*, *Site Selection*, *Corporate Real Estate Leader* and *Trade & Industry Development* magazines
- Frequent presenter on site selection, economic development and community development topics at CoreNet, SIDO, CSG, IEDC, and Transportation Research Board

Track Record and Samples of Advisory Experience

- Core location selection team member for the Boeing Company's corporate headquarters move from Seattle, WA, to Chicago, IL
- Acted as primary investigator for the Transportation Research Board's project to develop a guide for public officials to understand freight facility location decisions
- Previous corporate clients include Merrill Lynch, Intel, Club Med, ADP, Sanofi Aventis, Biogen IDEC, Boeing, Atlas Copco, Becton Dickinson, Cabot Corp, Times Mirror, Citigroup, Mohegan Sun, APL, NASDAQ, Olympus, Serologicals, Time Warner Cable, Freightcar America, Holtzbrinck Publishing, Husky Injection Moulding Systems, Cullen/Frost Bank, Destination Outdoors/Watermark, Fluor Signature Services, HCA The Healthcare Company, Colgate Palmolive, Thermo Electron, JP Morgan Chase, Lenovo, Lundbeck, Morgan Stanley, AIG, US Bancorp, Xerium
- Development and government clients include BC Hydro; Ashcroft Terminal (BC); Plaquemines Parish, LA; Western Mass EDC; Ellsworth, ME; Calais, ME; Elkhart County EDC, IN; the City of San Jose, CA; the state of Arkansas; Tampa Committee of 100; First Industrial Realty Trust; Palladium/The Related Companies; Allegheny River Towns Enterprise Zone (ARTEZ); City of West Palm Beach, FL; Gary Airport Authority; the Port Authority of Portland, OR; and The Port Authority of New York/New Jersey

Dr. Douglas van den Berghe

- Position: CEO & President EMEA
- Academic Qualifications: PhD degree in Business Administration, MA in Political Science, and BSc. in Economics, Erasmus University Rotterdam
- Years with the Firm: 8
- City and State of Residence:Amsterdam, the Netherlands
- Time Commitment on Other Accounts:
- Baku Airport Free Zone 15%
- AIM Dubai 15%
- Namibia SEZ Strategy 15%

As a management and strategy consultant, Douglas assisted many corporate clients in successfully implementing their global investment strategies, as well as optimizing their global supply chains.Some of his corporate clients include the following Global Fortune 500 accounts: Dover Corporation, Shell, Philips, Electrolux, HB Fuller, John Deere, Johnson Controls and ING.

Professional Background

- Douglas is founding partner of Investment Consulting Associates (ICA), LocationSelector.com and ICAincentives.com
- 15 years of experience in location selection, location optimization and Foreign Direct Investment (FDI) advisory and strategy consulting
- Previous experience includes Director of Ernst & Young - International Location Advisory Services (Europe), United Nations and KPMG
- Douglas is a visiting professor at the Erasmus University Rotterdam - Rotterdam School of Management (RSM)

Capabilities

- Assisted in setting up new manufacturing facilities in Eastern Europe, United States and Asia
- Advised in establishing a centralized finance organization in Eastern Europe. Reduced costs of finance processes by more than 25% improved quality of financial information and maintained at least previous process performance levels
- FDI policy reviews and Investor Guides for a number of countries in Africa and Eastern Europe. The reports highlighted the potential to attract new investors and retain existing investors

Track Record and Samples of Advisory Experience

- Developed locationselector.com a location benchmarking tool for ICA's corporate and governmental clients
- Developed ICAincentives.com, a global database with actual incentive deals
- Involved in numerous global relocation and location optimization restructuring projects for multinational corporations
- Extensive knowledge of location selection strategies, and supply chain optimization strategies in business restructuring
- Global knowledge of investment promotion strategy building
- Providing hands on advice and support in stakeholder management and implementation of projects in different business environments
- Industry expertise: automotive, chemical, oil & gas, financial services and IT
- Countries of work experience: Suriname, Cayman Island, St. Lucia, Trinidad & Tobago, Central America, EU-27, Vietnam, Philippines, China, Albania, Australia, Ghana, India, Iraq, Namibia, Mexico, Senegal, Tanzania, United Arab Emirates and United States

Laurens van der Schoor

- Position: Incentives & Free Zones Advisor
- Academic Qualifications: MSc. in Economic Geography and BSc. Human Geography & Planning, University of Utrecht; Minor, Economic Geography & Global Urbanism, Southampton University
- Years with the Firm: 3.5
- City and State of Residence:Utrecht, The Netherlands
- Time Commitment on Other Accounts:
- Baku Airport Free Zone 20%
- AIM Dubai 15%
- Namibia SEZ Strategy 5%

Professional Background

- Joined ICA as of February 2013 as Incentives Analyst and developed the incentives services line
- Multi-week outplacements across the US, including southern Michigan and northern Ohio, to contribute to a large corporate real estate project
- Wrote his Master Thesis on current incentive trends and practices across US states - utilized ICAincentives for this purpose

Capabilities

- Prepared, organized and coordinated site visits (Arizona, Kansas, Wisconsin, Illinois, Michigan and Ohio and in Eastern Europe: Croatia and Slovenia) and organized on-site meetings with local client representatives, real estate agents and architects
- Performed several in-depth analyses to benchmark and rank the competitiveness and incentive climate of countries and regions, including Namibia, Maine, Guatemala, Slovenia, Czech Republic, Poland, Germany, France, Croatia and Romania
- Thorough understanding of incentive practices, processes and trends in the US and Europe with a particular focus on the valid EU framework on state aid intensities
- Contributed to various publications, studies and white papers on incentives, including Columbia University's background paper on Investment Incentives and ICA's Incentives Transparency Index, which was presented at IEDC 2013 and compared with other research on the evaluation of incentives
- Contributed to the development of a 12-day training course for UN-Escap Investment Promotion Agencies (IPAs) across the Asia-Pacific on investment promotion and attraction and worked on a report on the design and implementation of Chile's IPA
- Performed a study on outward FDI as contribution to UNCTAD's annual World Investment Report
- Prepared various presentations on incentives and FDI, including Red Hot Locations (Vancouver, 2014) and IEDC (Philadelphia, 2013)

Proven Track Record

- Performed various corporate site selection projects for regional headquarters, shared service centers, data centers, production facilities and warehouse facilities across North America and Europe
- Recent corporate engagements include: Purac Corbion, Federal Mogul, Appvion, Pitney Bowes and multiple confidential corporate clients
- Advised a number of national, regional and multilateral governments and area developers in their FDI acquisition strategies including CEDA, CAIPA, COMCEC, DFID, NIC, Invest in Guatemala
- Work experience in: EU-15 and USA (including Arizona, northern Illinois, eastern Kansas, Massachusetts, southern Michigan, Ohio and Wisconsin)

Collin Perciballi

- Position: Economic Development Advisor

- Academic Qualifications: MBA, University of Bologna Business School; MA in Social Sciences specializing in the history and analysis of European territories, Erasmus Mundus TEMA Master Joint Degree Programme; BA in Political Science, Auburn University
- Years with the Firm:-
- City and State of Residence:Chelmsford, MA
- Time Commitment on Other Accounts:
- Town of Natick 15%
- State of Maine 5%

Professional Background

- Joined ICA in June 2016 as Economic Development Advisor
- International academic and work experience in the United States, Italy, and France, especially in the areas of business and economic development

Capabilities

- Acted as Office Manager for the Gulf Coast Center for Innovation and Entrepreneurship (CIE), a business incubator designed to help start-up companies survive critical stages of growth. While manager, he increased the CIE's occupancy from 78% to 86% and streamlined business operations by creating entry and exit protocols, applicant evaluation forms, and new fee structures.
- Drove lean inventory methods, such as implementing visual cues and standard notation while interning at Ceramiche De Simone. Also responsible for shop floor analysis, evaluating flow and space utilization of the factory, and implementing quality control logs in order to calculate waste
- While interning at the Greater Pensacola Chamber of Commerce as an Economic Development assistant, founded and managed Escarosa Business Continuity Initiative, a regional disaster preparedness group for the business sector. This required partnership-building with public and private entities, such as the Division of Emergency Management, Small Business Development Council, Workforce Escarosa, and multiple Chambers of Commerce. Four-Star Accreditation of the Greater Pensacola Chamber was also achieved with the US Chamber of Commerce under his direction.

Dan Hodge

- Position: Senior Associate

- Academic Qualifications: MA in Applied Economics and Master of Public Policy, University of Michigan; BA in Economics/Business, Lafayette College
- Years with the Firm:(Senior Associate - has been affiliated with ICA for 2 years)
- City and State of Residence: Northampton, MA
- Time Commitment on Other Accounts:Various economic impact analysis projects 15%

Professional Background

Dan Hodge has 20 years of experience in economic development analysis, benefit-cost analysis, and public finance.Previously, Mr. Hodge was Director of Economic and Public Policy Research at the UMass Donahue Institute, Senior/Principal Economist at HDR Decision Economics and Cambridge Systematics, and worked as an analyst at Regional Economic Models, Inc. (REMI) and KPMG.He has led numerous economic development, infrastructure benefit-cost (ROI), economic impact, and transit-oriented development (TOD) studies, and specializes in applying data to evaluate economic development impacts, policies, and opportunities for cities, regions and states.

Select Project Experience

Market Analysis for Kansas City Greater Downtown Area Plan. As part of a team led by BNIM to develop a comprehensive downtown area plan for Kansas City, MO, Mr. Hodge led the economic development and housing market analysis components.He analyzed local economic and real estate data, met with real estate development experts to gauge market trends and development opportunities, and developed strategies to enhance economic conditions and opportunities in downtown Kansas City.

Kansas City Streetcar TIGER Grant Economic Analysis. While at HDR, Mr. Hodge contributed to the real estate development and benefit-cost analysis components of the Kansas City Streetcar TIGER grant proposal to the U.S. DOT, and helped write and edit the grant application.

Rebuilding Renewal: Analysis of State Investment in Gateway Cities. With MassINC, Mr. Hodge authored a research report analyzing distressed Gateway Cities in Massachusetts. In particular, he examined state investment in Gateway Cities, assessed real estate development trends compared to Boston (which showed Gateway Cities not participating in economic recovery), and outlined ideas to enhance transformative development. He authored case studies of Worcester's CitySquare and New York state's Upstate Revitalization Initiative to showcase examples of catalytic investment that are leading to significant private sector investment.

Competitive Factors and Business Location Decisions in Massachusetts. Mr. Hodge was centrally involved in all aspects of an economic development research project for MassEcon to evaluate business expansion and location projects over the past 12 years. In particular, the study analyzed over 350 company-specific projects throughout the state, developed an in-depth business survey and interview process, reviewed incentive policies, and compared economic development projects to target industry initiatives (life sciences, IT, manufacturing, and clean energy).

Economic Development Assessment for Worcester Urban Revitalization Plan.Mr. Hodge led the economic development assessment for the Urban Revitalization Plan in downtown Worcester.He compiled economic, demographic and real estate market data for Worcester and interviewed numerous private and public sector development experts to assess the downtown area's challenges and opportunities, and developed a set of near-term and long-term economic strategies.

Economic Impacts of Federal Sequestration Spending Cuts on Massachusetts. Mr. Hodge led a complex study of the economic impacts of reduced federal spending due to the sequestration budget cuts.He applied a comprehensive approach to measure all the ways that federal funding impacts Massachusetts agencies, local government, the defense sector, research organizations and the private sector.

Kansas Economic Development Strategic Plan. Led an appraisal of the competitiveness of the Kansas economy as part of a statewide economic strategic plan update. The project examined economic performance, labor force shortages, capital availability, and economic development organizations.

Cambridge (MA) Business Profile and Economic Development Assessment. Mr. Hodge guided a comprehensive, data-driven business and economic assessment of the city of Cambridge.The study evaluated the city's strengths and weaknesses in terms of:a) key industries, businesses, and employment; b) demographic and socioeconomic conditions of Cambridge residents; and c) real estate markets, and applied the Economic Development Self-Assessment Tool (EDSAT) to better understand assets and areas for improvement.

Economic and Transportation Drivers for Siting Freight Facilities.Working closely with Chris Steele, Mr. Hodge played a lead role on this national research project to understand the economic and transportation factors for siting the full-range of freight facilities.He led the development of seven case studies of different freight facilities (intermodal, bulk, distribution centers, etc.) in terms of site selection criteria, and the economic and transportation benefits and costs of each facility.

Mr. Hodge has also worked at applying triple bottom line return on investment (ROI) analysis for sustainability initiatives, including a project for the Boston Redevelopment Authority evaluating ARRA investments and a triple bottom line ROI model for the Urban Sustainability Directors Network (USDN). He is a long-serving member of the Transportation Research Board's Transportation and Economic Development Committee and author of numerous economics and transportation articles, papers, and reports.

Global Prairie

Julie Gibson

- Position: Account Director, Public Affairs, Client Contact

- Years with the Firm: 5
- City and State of Residence: Fairway, Kansas
- Time Commitment on Other Accounts: As client services consultants, we scale our team and work to deliver client objectives at agreed upon deadlines.

Julie is an experienced entrepreneur and marketing professional with a focus on advising clients in public affairs and corporate reputation. Prior to joining Global Prairie, Julie was the founder of Clear, a boutique public affairs firm that she started in Kansas City in 2006. Julie merged her company with Global Prairie in 2011.

At Global Prairie, Julie has led large-scale integrated marketing campaigns including KC2016 - Kansas City's effort to win the 2016 Republican National Convention, Missouri's 2014 Transportation Proposal - Amendment 7 and the 2012 Missouri Tobacco Tax effort. Through issues management, crisis communications, and community and media relations' counsel, she helps her clients achieve their business objectives and protect their reputations in challenging environments.

Her client partners are widely recognized leaders in a variety of industries including economic development, not-for-profit, real estate, and transportation; they benefit from her strong relationships with local media and elected officials.

Julie is a graduate of the University of Missouri. She's a graduate of Kansas City Tomorrow and Centurions and serves on the board of MO CASA and the Shawnee Mission School District Committee for Excellence. She is the proud mom to twins Gibson and Katharine.

Anne D. St. Peter

- Position: Founder
- Years with the Firm:
- City and State of Residence: Mission Hills, Kansas
- Time Commitment on Other Accounts: As client services consultants, we scale our team and work to deliver client objectives at agreed upon deadlines.

Anne St. Peter is the Founder of Global Prairie, a global marketing firm with offices in Illinois, Kansas, Missouri, Texas, Ohio, Washington, D.C., Colorado, and Germany. Global Prairie represents clients committed to creating a healthier world. Anne leads a team of marketing pros who work exclusively with clients whose intention is to make a positive impact on the world, including Google, Bayer, Novartis, The Ivy League, and The Kauffman Foundation.

Global Prairie is a certified benefit corporation (B Corp), joining the ranks of companies such as Patagonia, Warby Parker, Seventh Generation and Etsy. B Corps are certified to meet rigorous standards of social and environmental performance, accountability, and transparency. The B Corp certification is to

business what Fair Trade certification is to coffee or USDA Organic certification is to milk. Global Prairie is part of a growing community of more than 1,000 B Corps from 33 countries and over 60 industries working together toward one goal: to redefine success in business beyond profit.
Prior to founding Global Prairie in 2008, Anne was a senior partner at Fleishman-Hillard, where she was a member of the firm's global operating committee and chairman of the firm's global health practice.
Anne's community involvement includes serving as past-chair of the board of directors of the Greater Kansas City Community Foundation, a $2.3 billion foundation that ranks in the top 1% of community foundations in the country in terms of total assets, gifts and grants. Anne is an active member in the Midwest chapter of the Young Presidents Organization (YPO). In addition, Anne was only the third woman in 128 years to chair the board of directors of the Greater Kansas City Chamber of Commerce. Anne is a member of the board of directors of the Kansas City Area Life Sciences Institute and is a trustee at The Pembroke Hill School. Anne has been recognized as a "Woman Who Means Business" (Kansas City Business Journal), "40 Under 40" (Ingram's Business Magazine), Woman Mentor of the Year (The Central Exchange), and "Top 100 Marketers" (PR Week). She has served as a director on the holding company board of Blue Valley Ban Corp since 2007.
Anne is a graduate of Wellesley College. She is married to Robert F. St. Peter, M.D., president and CEO of the Kansas Health Institute. They are the proud and busy parents of two teenagers, Claire (15) and William (13).

Lauren Johnson

- Position: Strategist, Director of Research + Insight
- Years with the Firm: 2
- City and State of Residence: Denver, Colorado
- Time Commitment on Other Accounts: As client services consultants, we scale our team and work to deliver client objectives at agreed upon deadlines.

Lauren is, if anything, contagious. Her uncanny ability to connect with others is not limited to her work with peers and clients she's out there connecting with audiences every day. As Global Prairie's director of research and a strategist, Lauren seamlessly executes and blends quantitative and qualitative research with the precision of an economist and the humanity of a social scientist. Through the duality of art and science, Lauren inspires audience understanding and provides cultural context through storytelling and the art of simplifying all that is complex. Lauren consistently articulates poetic insights designed to create data-centric and business-changing ideas that build lasting relationships with consumers.

Her research and strategy clients have included NBA, WNBA, WBCA and Whole Foods Market. Prior to joining Global Prairie, Lauren was an account planning director for Cactus, Denver, and a strategist for the National Basketball Association. Previously, she worked in economics and shopper marketing and has degrees in economics and marketing, and an academic theme in gender, society and culture. Lauren serves on the board of directors for The Blue Bench.

Shockey

Sheila Shockey

- President and Founder
- Years with the Firm:18 years
- City and State of Residence: Lenexa, Kansas
- Time Commitment on Other Accounts: 75% - 25% available for this project

Sheila Shockey is the founder and president of Shockey Consulting Services, LLC.Sheila has worked in the Kansas City region as a staff member and a consultant for governments since 1989. She has specific experience in educating and involving the public. Sheila brings the perspective of having worked in a government agency, a deep understanding of the transportation issues and the ability to translate that information effectively to all stakeholders.She understands how to gain consensus and consent on transportation projects. She is the public involvement principal directing engagement and planning work on transportation projects including bi-state plans, regional studies and plans, statewide initiatives, local studies and plans, local design projects. She has experience working on roadway, bridge, multi-modal, transit, bike-pedestrian, traffic signal, and land acquisition issues.Sheila has successfully engaged groups typically under-represented and ensuring environmental justice in outreach efforts.She has over 20 years of experience working on multi-modal transportation projects and complex public policy issues.

EDUCATION

- Bachelor's in public administration, Washburn University
- Master's degree in public administration, University of Missouri - Kansas City.

Qualifications & affiliations

- International Association of City/County Management
- American Public Works Association
- American Society of Civil Engineers
- Society of American Military Engineers
- American Planning Association
- Water Environment Federation
- International Association of Public Participation
- Society for Marketing Professional Service

Erin Ollig, AICP, ENV SP

- Years with the Firm: 11 years
- City and State of Residence: Olathe, Kansas
- Time Commitment on Other Accounts: 70% - 30% available for this project

Erin Ollig, AICP, is an urban planner who is an experienced planning and stakeholder engagement project manager. She has managed several comprehensive and community plans resulting in more sustainable communities. She excels at creating dynamic, exciting planning processes that are highly interactive with large-scale participation. She is skilled at facilitating in-person planning workshops and virtual interaction events. She has used web-based technology to gather input from stakeholders and hold highly interactive conversations about important community issues. She has technical background in land use, environmental, transportation, parks, infrastructure and housing issues. She joined Shockey in 2005 after working for city and county government.

Education

- Master's in Urban Planning, University of Kansas
- Bachelor's in Sociology, St. Cloud State University

Qualifications & affiliations

- Treasurer of the American Planning Association- Kansas Chapter
- American Institute of Certified Planners
- ENV SP | Institute for Sustainable Infrastructure

Beth Quindry

- Years with the Firm: 10 Years
- City and State of Residence: Kirkwood, Missouri
- Time Commitment on Other Accounts: 50% - 50% available for this project

Beth Quindry has worked in Kansas City and St. Louis as a staff member and consultant to governments for the past fifteen years.In 2008, Beth established an office for Shockey in the St. Louis area (Kirkwood).Beth managed several broad-based community engagement projects in both Kansas City and St. Louis. Her experience includes strategic plan development, Council goal setting, budget prioritization and development of performance measures.

Prior to joining Shockey in 2005, Beth supported Kansas City, Missouri's economic development team, serving in positions including finance manager for the City's convention center and the city manager's liaison to the City Planning Department).Her experience also includes development and administration of surveys.

Education

- Bachelor's in Political Science, University of Missouri-Columbia
- Master's in Public Policy, University of Wisconsin-Madison

Qualifications & affiliations

- International Association of Public Participation (IAP2) trained facilitator

Bellewether

Kay Saunders

- Position: Founder/CEO & Managing Consultant
- Years at Firm: 1994 - Present
- City and State of Residence:Lee's Summit, MO
- Time Commitment on Other Accounts:85%

Kay Saunders is the Founder and CEO of Bellewether, Ltd., an organization consultancy, and its subsidiary, The Human Asset Imaging® Institute which is dedicated to the people side of productivity.Her professional career spans over 30 years in which she was employed with such stellar companies as IBM, Digital Equipment Corporation, AT&T and Jostens Learning.A champion of continuous improvement in human systems, Kay recently authored the book, *Interpersonal Secrets for Professional Success*.

Though her career began in the corporate world, Kay discovered a passion for entrepreneurship, launching Bellewether in 1994 and the Human Asset Imaging® Institute in 2009. She has dedicated her focus on business development practices, as well as the creation of tools, structures and curricula that build capacity and implement sustainable growth.
Kay's approach to individual and cross-functional team performance provides organizations with methods to leverage relationships that impact key business metrics across the enterprise.
Practice Areas

Private and Public Sector Business Strategies, Organizational Behavior, Human Performance, Organizational Structures, Interpersonal, Multicultural and Group Dynamics.

Education
2004 - Masters in Business Administration - Rockhurst University
1976 - Bachelor of Science, Education - Lincoln University
Affiliations

Current:

- Executive Committee-Secretary | Greater Kansas City Community Foundation
- Board Member | Greater Kansas City Community Foundation
- Member | National Association of Women Business Owners
- Member | Women Impacting Public Policy

Past:

- Chair | Eastland Community Foundation Board
- Regent Emeritus | Rockhurst University Board of Regents
- U.S. Delegate | Futurallia International Business Conference | 2011
- U.S. Delegate | Futurallia International Business Conference | 2010
- Past President of the Board | Seton Center and Seton Center School
- Past President of the Board | Kansas City Adult Basic Education Program
- Member | Ethics in Business Steering Committee | Lee's Summit, Missouri
- Mayor Appointee | Missouri Downtown Economic Stimulus Authority commission |
- Lee's Summit, Missouri
- Mayor Appointee | Land Clearance Redevelopment Authority | Lee's Summit, Missouri

Jami Henry

- Position: President/COO & Managing Consultant
- Years at Firm: 1995 - Present
- City and State of Residence:Lee's Summit, MO
- Time Commitment on Other Accounts: 30%

Jami's professional career spans over 20 years where she has successfully employed her knowledge and talent toward improving organizational efficiencies. She has worked in a series of client engagements offering expertise in optimizing organizational structure and foundations, business process design and documentation, gap analysis, document management, change management, leadership advancement, performance and project management, technical writing, software/system application documentation and instructional design strategies.

Utilizing LEAN process theories and a variety of relevant tools, Jami can quickly discern a business culture, understand the goals and assist teams. She can create relevant gap analysis, suggest tactical solutions and provide project management practices to implement the defined change or solution. Her distinct ability to incorporate self-directed accountability into a process and help teams embrace change, sets her apart.

Jami has completed 100+ organizational practice structure, process and change management projects in industries such as telecommunications, healthcare management, utilities, insurance management as well as various federal, state and municipal government agencies, each coming in on time and within budget.

Practice Areas

Private and Public Sector Business Strategies, Business Analysis, Operational Process & Efficiency Architecture, Document Development & Management, Communications and Organizational Behavior

Education

- 2004 - Masters in Business Administration, Rockhurst University
- 1986 - Master of Science, Industrial Technology, University Central Missouri
- 1982 - Bachelor of Arts, Mass Communications, Truman University

Affiliations

Current:

- Member | National Association of Women Business Owners | KC
- Member | Society of Professional Journalist | Sigma Delta Chi

Past:

- Immediate Past President | National Association of Women Business Owners | KC
- President| National Association of Women Business Owners | KC
- President Elect | National Association of Women Business Owners | KC
- U.S. Delegate | Futurallia International Business Conference | 2011
- Leadership Steering Committee | Futurallia KC 2011 - International Business Conference
- U.S. Delegate | Futurallia International Business Conference | 2010
- U.S. Delegate | Futurallia International Business Conference | 2008

Kerri VanMeveren

- Position: Consultant

- Years at Firm: 2014 - Present
- City and State of Residence: Cleveland, MO
- Time Commitment on Other Accounts:30%

Kerri is an accomplished and visionary leader with domestic and international experience in operations (India, Brazil, Israel and the UK).

Kerri has the ability to bring organizations together in alignment through identifying conflicting priorities to obtain a common vision for change, develop strategy for educating employees, implement programs to encourage individuals and groups to take ownership for their new roles and responsibilities and execute concrete plans for measuring progress.

Kerri provides expertise in developing and maintaining project management standards and templates.She facilitates tool selection to support enterprise reporting, metrics and analysis to enhance existing business operations to meet a set of evolving challenges, functions and services.

Practice Areas

Strategic to Tactical Planning, Lean Six Sigma, Program & Project Management, Gap Analysis, Process Reengineering, Change & Risk Management, Performance Metrics Definition, Balanced Scorecards, Business Case Development and Coaching & Mentoring

Education

- 2012 - Masters in Business Administration - Ottawa University
- 1997 - Bachelor of Science - Computer Information Science - DeVry University
- 2014 - PMP Certification
- 2008 - Six Sigma Greenbelt Certification

Affiliations

Current:

- Computer Science Advisory Board Member, Grantham University
- Director, University Outreach Program, Project Management Institute (PMI)
- Committee Chair, Nonprofit Economic Council (ACA)
- Member, Central Exchange
- Volunteer, Jackson County CASA (Court Appointed Special Advocate)

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

Each of the key positions in the team organization has a lieutenant who will be integrally involved in the respective tasks. While each individual and key employee brings a unique set of experiences and capabilities, these are overlapped within the team in such a manner that other team members will be able to step in to fill any loss.

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

Staffing Plan.pdf Please see our proposed staffing plan attached.

6. Provide an organizational chart for the assigned staff.

Project Team Organizational Chart.pdf The attached shows our proposed organizational structure for the project. We have considerable experience in managing projects of this scope and this accelerated timeframe. The staffing and organizational structure will enable parallel coordinated efforts, allowing the team to meet the City's desired timeframe.

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

Each of the key positions in the team organization has a lieutenant who will be integrally involved in the respective tasks. In the case of vacation or planned absence, key tasks and milestones will be planned out in advance to ensure no disruption of any kind. For unplanned absences, the lieutenant will be able to assume duties and any lost bandwidth will be replaced from other resources at our disposal.

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.

Investment Consulting Associates has assembled a team that augments its own well-established expertise in business location strategy, economic development, and incentives analysis with partners who excel in local insight into the Kansas City Market, economic analysis, and stakeholder input, together ensuring that each of the above questions may be asked and answered to the fullest.Our team provides the depth of experience and practical knowledge essential to equipping Kansas City with the measures and context needed to make public policy decisions that optimize incentives use for building a thriving and sustainable local economy.

Project Approach

Evaluating the overall use of incentives is an important part of understanding the City's long-range financial outlook and will inform the future direction of economic development policy. It will also increase transparency and accountability by establishing a process 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 the 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.

Investment Consulting Associates (ICA) has worked in communities, regions, and countries around the world to evaluate and/or develop customized economic development and investment promotion programs.We often help companies make location decisions and, consequently, know what causes a company or investor to choose one location or project over another.We will use this experience to develop measures for Kansas City's programs and also showcase examples of what works well in other jurisdictions, as well as lessons learned from regimes which have not.

We have slightly revised the suggested scope and to propose a five-task approach to the project:

- Task 0 - Project Launch and Team Coordination
- Task 1 - Identify Key Performance Indicators for all Incentives Programs (including stakeholder outreach)
- Task 2 - Complete a Historical Analysis of Key Performance Indicators
- Task 3 - Assist the City in Developing On-going Monitoring and Reporting Systems
- Task 4 - Ongoing Support

Task 0 - Project Launch and Team Coordination

The most successful projects begin with establishing a strong working relationship.The project depends on the ability to exchange data and ideas as a part of reaching successful conclusions and delivering a realistic, actionable plan.We will work directly with City staff to put this foundation in place. We will work directly with City staff to construct this critical foundation.

Steering Committee

In our experience, we find that projects of this nature have the best opportunity for success when guided by a small steering committee.If the steering committee has not yet been identified, we can help create one which would include key members from City government and staff.This - if desired - could be augmented by community leaders, other stakeholders, and members of the business community.Such a committee allows for diversified but manageable input throughout the project and builds early-stage buy-in on solutions.

It is important to note that this steering committee does not supplant the working relationship between the ICA Team and the City of Kansas City, but instead creates a working group that can help present insight and who will help ensure community buy-in and support for the eventual plan.

Project Kickoff Meeting

The project kickoff meeting will take place in person within two weeks of the project commencement date.Project goals will be discussed and confirmed, as well as dates chosen for regular update meetings.We will review the project schedule and confirm the scope of work.

In addition to the kickoff meeting with City of Kansas City staff, we suggest scheduling a meeting with the steering committee soon after the project start.The goal of this meeting is to get honest answers to questions while obtaining a good feel for the environment and political context.While already well acquainted with the City, we also request that a member of the City of Kansas City staff accompany us on a driving tour of the City of Kansas City to examine some of the key areas.

Regular Conference Calls

We propose holding regular update calls on a biweekly schedule at a pre-determined time and day of the week.Some of the calls will be conducted with voice only while others will feature interactive Go-To-Meeting sessions if specific materials need to be discussed.We recommend key City staff and the project manager be present on the call, as well as members of the Steering Committee noted above.

Task 1 - Identify Key Performance Indicators for all Incentives Programs

The need for economic development and real estate incentives is based in economic development or other public policy goals.The incentive tools are a pure expression of the City's direct involvement in generating economic investment and results.As described in the RFP, 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 formation, attraction, retention and expansion in the form of new equipment purchases, and expansion of operations.

Hence, the primary measures for any program will be to assess results in the context of stated program goals. 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. To measure the effectiveness of economic development incentives, we first need to identify an appropriate and comprehensive set of key performance indictors (KPIs) for each program. At the crux of this effort is gaining an understanding of what various incentives programs indented to accomplish.

We will begin with a thorough review of the enabling legislation for each of the programs. The kickoff meeting will set the tone for the entire process and, from a project management and communication point of view, be considered an important activity within the whole Project Work Plan. Prior to the kickoff meeting and considered the first action item under Task 1, all project team members will make themselves familiar with the project statutory references, as well as prior reports and important (benchmark) studies.The team will:

- Review and assess the Statutory References in enabling legislation (all references currently available and listed in the RFP for this project);
- Review relevant and listed reports by City of Kansas City and the State of Missouri;

- Collect and tabulate available incentive reporting data from the City of Kansas City;
- Review and evaluate existing Industry Sector Reports and Industry Intelligence in relation to regional investments; and
- Review Existing Location Value Proposition for city's investment targets.

We will also use our proprietary IncentivesMonitor.com database to review reported awards in the City and region to begin to assess some of the competitive projects in the region - both in Missouri and in neighboring Kansas to better understand the regional context.

As noted in the RFP, incentives that have been applied in Kansas City over the past 25 years cover a wide-range of city economic development goals from blight mitigation to increasing property values to business retention/expansion and job creation.To effectively structure the KPIs for this project, we propose using a systematic framework to help categorize and distinguish different incentive programs. To accomplish this, it is worth considering the different dimensions and characteristics of incentives and how their objectives interplay with physical redevelopment and business growth:

- **Different fundamental objectives -** incentives focused on land/building redevelopment, such as the tax increment financing (TIF) programs applied frequently in downtown Kansas City (e.g., Power & Light District), are inherently aimed at redeveloping areas of the city, helping to attract visitors, shopping, residents, etc.This kind of incentive (essentially a form of "gap financing") is very different from tax abatement incentives aimed at helping specific businesses locate or expand operations.
- **Varying and overlapping geographies -** economic development incentives intrinsically relate to physical locations - TIF districts, specific parcels and infrastructure, and tax abatements based on company location/expansion projects.So, different incentives will have different geographic impacts on Kansas City and in some cases, there will be overlapping geographies as more than one incentive is applied to areas.
- **Different timing expectations to realize positive impact -** incentives also vary in terms of how soon we would expect to see a substantive impact.For example, incentives focused on mitigating blight and redevelopment in long distressed areas (e.g., enterprise zone tax incentives) may require many years, and multiple phasing of incentives to realize the full impact.Conversely, tax abatements for company expansion or location projects often detail very near-term expectations in terms of capital investment and job creation or retention (e.g., immediate and within five years).
- **Different multiplier or spillover effects -** one goal of implementing economic development incentives is that they will lead to positive multiplier or spillover effects, but it's very likely that the geography and sectors impacted "indirectly" will vary by incentive.For example, an incentive to help a manufacturing company locate in Kansas City may have multiplier effects across a range of supplier industries within and beyond the city limits.On the other hand, urban redevelopment incentives are more place-based with the hope that positive economic and residential activity in one location can act as a catalyst for positive redevelopment in nearby urban areas. We will also use a "reverse site selection" model - an adaptation of our location strategy tools - to examine the competitive effects that may already be drawing or hampering

economic investment in the City.Such an analysis identifies the City's natural strengths for workforce, talent, infrastructure, cost base, utilities, and other business drivers.It also matches these to particular investor types and industries so that the City can ascertain whether a tool is effectively addressing a known shortcoming or augment a potential strength.

- **External factors that impact the effectiveness of incentives -** incentives are one factor for economic development decisions of developers and private business, but there are many other factors that impact investment decisions and thus, the real or perceived effectiveness of incentives.For example, the success of urban area TIF districts may also be dependent on other supporting policies and infrastructure.Very relevant to downtown Kansas City, the implementation of bus rapid transit (BRT) MAX service and the 2016 implementation of a streetcar are likely having development impacts on areas near each corridor.In this case, there could be positive synergy between these initiatives (TIF and transit) that may not exist in all areas of the city.

While recognizing that these different dimensions to incentives will help determine key performance indicators, it will be important to understand that each program contains overarching objectives that relate on a broader level to:1) elimination of blight; and 2) retention or creation of jobs.

To complete this task with the development of program KPIs, we will begin by documenting each individual incentive program used in Kansas City and working with the client team to ensure that we have both data examples of each incentive as well as clear understanding of how they are intended to work to create positive impact.Although a deeper dive into the database of Kansas City incentive projects may reveal some modifications, our initial thinking is that we will organize KPIs by:

- Incentives focused on <u>eliminating blight and spurring redevelopment</u> - with KPIs for both direct impacts on the parcels/districts, and indirect effects to the surrounding areas.
- Incentives focused on <u>job creation and retention</u> - these KPIs may be more company-specific but will also include direct effects on the businesses, as well as indirect effects.

Along those lines, and working closely with the City, we propose identifying a manageable set of KPIs that cover the most relevant impacts of each incentive.KPIs for place-based incentives focused on eliminating blight and spurring redevelopment will likely include:

- Private investment generated on site - commercial, industrial, residential
- Assessed property values and property tax revenue
- Square feet of development by use - retail, office, residential, industrial
- Occupancy / vacancy rates of available space
- Additional and/or supportive public infrastructure investment - water/sewer, roadway, etc.
- Jobs and wages
- Housing units (market rate and affordable)
- Indirect effects focused on changes in property values and new private investment in surrounding area (e.g., ¼ mile buffer)

For job creation/retention incentives, KPIs will include:

- Private investment in buildings, land and equipment
- Number of jobs created and retained (measured separately)
- Wages and/or average wages of jobs
- Additional and/or supportive public infrastructure investment - water/sewer, roadway, etc.
- Business formation data
- Indirect effects will likely focus on "multiplier effects" for Kansas City based on suppliers (indirect) and consumer spending from wages (induced)
    - Priority ranking of the effectiveness per program; and
    - Detailed cost-benefit assessment at the City level with aggregated result.

We understand that 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. We also understand that the City has already begun to develop a database of relevant data for several of the programs (a listing of data fields was circulated to interested parties as part of Addendum 4: Additional Information on Incentive Programs).

We also suggest that the following be incorporated in this Task of the project:

Examine Insight from Team's Past Experience

Through our work in evaluating other regions' incentive programs, we have gained valuable experience in how to match program data to stated community economic development and public policy goals.In practice, this often means examining the goals of more than one institution, department, or stakeholder group and how these do or do not support the more explicit goals of the program.We find this to be a critical exercise as such information often impacts how programs are actually implemented and managed, and therefore ultimately impacts the results.

Before moving forward, we would develop a grid of salient information gained from the review of current programs and conduct a working session with City staff to examine these overlaps and also discuss other insights gained from other past experience with a specific eye towards application to the current project and possible integration into future measures and tools.

Review Other Best Practices

We will call upon similar work we have performed in other jurisdictions to collect and summarize data on best practices other communities have developed to measure the direct and indirect impacts of incentive programs upon economic diversity, investment, and innovation in their communities.As one example, we will showcase many of the measures developed over the past four years in the State of Maine to measure and hone the programs that state has developed to improve its economic development and research & development environment.The mix of direct and indirect measures - as well as the decision making process - will provide many possible examples for adoption as well as an effective context to examine goals and desired outcomes.

Obtain Insight from Stakeholder Groups

Strong, collaborative relationships are a foundational element of this work and Global Prairie and Shockey Consulting have strong track records in this arena. A critical step in translating research into practice is through finding the trusted channel to act as validators and communicators. There is a science and an art to building relationships. We have the "science" down: conducting a comprehensive landscape audit to identify the trusted voices and the specific roles different partners could play in advancing the mission, as well as understanding which audiences impact and motivate those potential partners.

We want to understand what relationships already exist, and the feasibility of building new bridges through a tailored approach. Our team members have the diverse backgrounds and expertise to bring the "art" needed for this outreach to be successful - we have many existing relationships with thought leaders and have worked across a wide variety of Kansas City stakeholder audiences to develop relationships with community groups, taxing jurisdictions and the real estate community.

And, we will integrate this work with the research approach to draw out anecdotal and textured feedback from stakeholders. In addition to one-on-one meetings, we would host a facilitated public meeting where key audiences will engage in a thoughtful discussion about previous economic development efforts that includes opportunities to provide feedback. This will allow us to better understand the true community impact of the City's economic development efforts and determine if there are better metrics for evaluating the City's historic and future use of incentives.

Survey Tool

Based on our experience with similar projects we feel it may be worthwhile to implement a survey to ask "recipients" of incentives some questions about how the incentive helped them. This tool may be used for businesses receiving tax abatements (or similar) to locate/expand and grow jobs, and/or may be targeted to developers or property owners about the activity level on their sites (businesses, jobs, residents, etc.).

The main objective of the survey is to evaluate the performance of receiving entities in relation to business activity and investment.The following activities will be addressed:

- Best and worst practices of current programs;
- Collection of data on evaluation criteria and clear definitions;
- Questions on participants' understanding of the evaluation process and criteria;
- Prepare and finalize online survey;
- Finalize list with stakeholders based on input from City of Kansas City and own research; and
- Submit online survey to all stakeholders (i.e., companies and institutions).

ICA has access to a corporate license of the SurveyMonkey software application, allowing for the creation and distribution of professional online surveys.The online survey application allows the user to aggregate and export the survey results per question and to analyze the response on an individual basis.It is a secure and efficient way of reaching a selected target audience.While most interviews will be conducted through a carefully designed survey through SurveyMonkey, the team may choose to interview key participants in person or by telephone.

Task 2 - Complete a Historical Analysis of Key Performance Indicators

As described above in Task 1 and the RFP, estimating the impacts over time of incentives will require a thoughtful, systematic organization of incentive types and programs, property uses, implementation timing, geography, economic development objectives, funding mechanisms, etc.To accomplish this analysis, we propose a few overarching areas of work in this task.

First, and at the very outset of the project, we propose to do a deep-dive analysis of the information and data that Kansas City has been able to compile and obtain related to incentives over the last 25 years.This sub-task will help to identify and confirm:1) the completeness of data and how it relates to our initial thinking on KPIs; 2) any "data cleaning" to correct obvious errors or missing components; 3) the ability to apply various statistical methods (e.g., forms of regression analysis or before/after analysis) with the data; and 4) additional data collection needs to best complete this project.

Second, working closely with the City, we'll identify additional data collection needs to support the project.This could include information that likely exists but has not yet been compiled (e.g., historical assessed value data by parcel), data not yet obtained (e.g., job levels at companies receiving incentives), or data that needs to be re-configured (e.g., geographic matching of incentives, or related public infrastructure investments).

Based on our work on other incentive evaluation projects, we are prepared to quickly implement a survey to help obtain critical information needed to do this work.For example, in our economic development incentive evaluation for the state of Maine, we distributed a series of surveys to businesses gathering critical information on jobs, wages, sales volumes and private investment.We can adapt these survey instruments for Kansas City, potentially creating a new survey focused on developers to gather information on private investment, occupancy rates, etc. where it may be missing.

Third, another early stage activity that we propose as part of this analysis is to conduct a series of interviews in Kansas City to get first-hand perspectives on the impact and influence of incentives that have been implemented to date.We propose structuring the interviews around both:a) coverage of different incentive programs/types; and b) different types of stakeholders and experts (development experts, specific companies receiving incentives, non-profit civic organizations, etc.).One of the main purposes of the interviews is to generate information and context for the role that incentives played in generating impact.As mentioned above, evaluating incentives can be highly complex based on different factors that influence effectiveness.Interviews should help us disentangle (conceptually) the role of incentives compared to other factors and investments, as well as how overlapping (multi-layered) incentives combine to achieve impact.Results from the interviews (up to 25) will provide critical context to this work and directly guide the analytical direction of our estimation methods and assumptions.Leveraging our Kansas City-based teaming partners, we will develop interview protocols to ask a consistent set of questions to garner the most relevant information.

Fourth, based on the initial analytical tasks and data gathering sub-tasks described above, we'll focus on analyzing "direct" key performance indicators of all incentive programs.Direct impacts refer to impacts and effects directly experienced by areas, parcels, and companies receiving incentives.This statistical analysis will begin with fairly basic descriptive analysis of trends over time for each incentive project, and (where possible) before/after analysis so that we can understand the core attributes of "what happened" once incentives were implemented.Based on this, we'll work closely with the City to recommend and select a set of analytical techniques that:a) are able to capture actual/expected impacts measured by changes in KPIs over time; b) are practical and feasible within the timeframe of this project; and c) are supported by available data.For example, a fairly standard statistical method is to compare impacts in areas (or for companies) that received an incentive with other areas that did not.For a geographic area or parcels, this could mean identifying "control" areas within the City that are otherwise similar but did not receive incentives.For company-specific tax abatements, this could mean comparing growth rates to broader regional or US industry employment growth trends.

The preferred set of analytical techniques will be determined during the project and is likely to include a mix of methods to help solidify and clarify findings (e.g., percentage changes over time, comparisons to city and metro area data, difference in differences statistical techniques, etc.).To the extent possible, and informed by the interviews, we'll attempt to control for corresponding factors that may also have influence on the effectiveness and impacts of incentives (e.g., how critical were multiple incentives to a single project or district, or how important were other public investments such as transit, to achieving impacts over time).

Fifth, again using the data on direct impacts and incentive projects, we'll develop methods and data to analyze spillover and multiplier effects of more place-based incentives as well as more company-specific incentive projects.For place-based incentives focused on eliminating blight and spurring redevelopment, we aim to measure effects on the surrounding property values and real estate market.This analysis would require the determination of a geographic area of influence (e.g., ¼ mile buffer), historical data on property values, real estate market data (lease rates, occupancy levels for different uses, number of housing units, etc.), and agreed upon comparison areas to gauge trends over time.For company-specific incentives to boost job creation or retention, we propose using direct effects on jobs and wages, and applying an input-output model to estimate multiplier effects for Kansas City.Team member Dan Hodge has two decades of experience applying I-O models such as IMPLAN and REMI (used by the Mid-America Regional Council) to estimate broader economic effects.This method is both efficient and consistent with industry standards.

We also have considerable experience in developing direct and indirect ROI cost-benefit models for programs of a similar nature.Despite the challenges in obtaining all the required data, our analysts have considerable experience in building customized cost-benefit models for evaluating economic development instruments, such as incentive schemes.Below is a further summary of sub-tasks:

- Prepare the cost-benefit model in Excel;
- List the assumptions;
- Validate and cross check data;
- Run the model; and
- Draft conclusions.

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

While a one-time assessment provides useful information on reviewing and modifying programs, the best approaches to incentive management and integration with other tools requires robust monitoring and reporting.We understand that the City recognizes this as well and 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.

It is also our experience that cultural and organizational factors are as much at play in monitoring and management as are systems and software.As such, our team will provide lessons learned and best practices on how to enhance communication and improve transparency in the deployment of economic development incentives.In addition to the positive impacts this has on the management of programs, such enhancements also improve transparency by helping ensure that the public clearly understands the positive benefits of these efforts.

We will review Kansas City's current efforts and compare against best practices for the following (Please note that this is only a starting list and may be altered based upon the findings of earlier tasks):

Economic Incentives Program Administration - We will 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.

Organizational and Reporting Review - We will examine the internal processes for collecting information and disseminating it within and among the various departments, organizations, and institutions with responsibility for economic development, taxation, workforce, education, infrastructure, and other factors that are either manipulated or measured by local incentive programs.In particular, we will examine and provide best practice feedback on the ability to share data in a meaningful way for the purpose of evaluating and decision making on the City's programs.

As part of this, we will review all existing economic incentives reporting across agencies including the City, the Economic Development Corporation and its associated statutory agencies (PIEA and Port Authority). We will then identify reporting gaps, duplications, and/or practices which should be replicated. The Team will evaluate for effectiveness at communicating key performance indicators and clearly communicating the outcomes at the program, plan and project level. We will then compare these against other local government best practices (including examples of reporting types). Recommendations will include suggestions for improved practices including report types, audiences, and mechanisms of conveyance.

Communications - In order to develop solid strategic recommendations to improve communications and improve transparency in the deployment of economic development incentives, we will gather information in order to analyze the impact and effectiveness of its past communications efforts.

Specific to incentivized economic development projects, Global Prairie will conduct a thorough communications audit to research City and EDC-led communications efforts to convey the infrastructure and community benefits of these projects.

We believe in leveraging all the work that has been done to date. We will begin with a full review of existing primary and secondary data. Particular attention will be focused on recent communications efforts undertaken by both the EDC and the City in order to better understand the message, the messenger, channel delivery and the effectiveness of previous efforts.

This analysis will deliver a foundation of understanding, and will allow us to deliver actionable insights, industry best practices and solid strategic guidance for future efforts.

- Understand - We believe outreach is most successful when we start with a strong understanding of our target audiences, what they find motivating and learn how to best gain their attention, their hearts and their support.
- Internal Audit - On site meetings with communications staff to review existing material, assets, and marketing/communications channels in order to conduct a thorough audit of ongoing activities and opportunities. 30-minute interviews (8-10) with internal stakeholders (current and former elected officials, EDC board members, communications staff) with a focus on understanding effectiveness of previous communications efforts (IF NEEDED)
- External Audit - Online and offline research for press releases, earned media coverage, project announcements and other relevant communications related to economic development projects. 30 minute interviews (8-10) with external stakeholders (taxing jurisdictions, community groups, residents) with a focus on understanding perceptions around previous economic development efforts. Conduct municipal/economic development industry research across agreed upon peers/competitor cities to capture communications best practices and marketing communications activities

Analysis and Message Articulation (Phase Two) - Global Prairie will analyze findings and develop insights and recommendations to move forward and inform the development of strategic communications activities for future economic development efforts. This process will result in a key insights report that will share key learnings and recommendations for moving forward.

Monitoring - We will also evaluate and rank the capacity, effectiveness, and ease of use of existing legacy software systems and platforms.In particular, we will examine the platforms' ability 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 incentive data collection systems and compare these benchmarks against existing systems.

Existing software platforms that may be evaluated include Salesforce, PeopleSoft, EnerGov, MySidewalk, and CoStar and other platforms. We will also evaluate current contract monitoring practices to identify monitoring duplications and/or gaps and develop a plan for improvement.

Task 4 - Ongoing Support

We will remain in contact even after project completion for appropriate follow-on care.We feel our job is not over until the client has implemented the plan.The City of Kansas City will learn from its efforts as it executes the plan, and we will be honored to help guide future actions as needed.

An illustrative timeline is attached below:

[Gantt KC.pdf]

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?

The ICA/Global Prairie/Shockey/Bellewether Team brings a series of tools, talents, and insights that make for a uniquely qualified team to assist Kansas City meet its needs.

- ICA experience working with incentives from both public and private sector perspectives, and extensive project with Maine, with many lessons learned and methods that can be applied here.This experience has been gained and applied across the globe, ensuring that it has been adapted to and learned lessons from working to solve a wide variety of problems.
- ICA characterizes itself through a blend and competitive mix of practitioners' academic and policy experience in location selection, competitive analysis, research, and foreign direct investment (FDI) advisory and software development. This combination makes our business proposition unique.
- We have the research and analytical methods expertise but are also ultimately focused on achieving practical, credible results in a condensed project schedule.This includes the decision making tools that companies use to choose where and when to locate and invest.It also includes the ROI and cost benefit models needed to determine whether and how incentive programs are a wise investment for the public sector.
- Between our local partners and Hodge's work in the downtown area (downtown plan and streetcar project), we have significant background on KC economic development trends, and access to key stakeholders
- Our team has a proven track record of delivering complex economic development analyses for broad range of public and non-profit clients throughout the US.
- All of the member firms are intentional about cultivating strong and lasting relationships with our clients. We coach our teams to be curious, passionate, hopeful and collaborative. We also are tenacious about exceeding expectations and delivering measurable results with impact. In our experience, exceptional account management happens at the intersection of strategy (ensuring we are making sound decisions based on data); creativity (ensuring we are recommending strategies designed to drive growth); and accountability (ensuring we are exceeding expectations for ROI).
- ICA and Global Prairie explicitly custom-build multi-disciplinary teams of diverse category, audience and channel experts around each business problem. These collaborative teams deliver maximum results for each unique challenge.

- We go deep to uncover insight. We're insight-driven. We're inquisitive and rigorous. We creatively collect data and articulate tailored and textured insight designed to bring illumination.
- We deliver a powerful point of view. Through the convergence of perspectives and insight we deliver a clear point of view that guides new creative solutions and ultimately, transforms your business.
- Global Prairie has offices in in Kansas City, where they have deep and relevant local knowledge, experience and relationships working throughout the region. Our team has significant experience working with the City of Kansas City, MO, real estate developers and community organizations and groups throughout the city.

3. Describe your Quality Assurance Plan.

ICA Quality Management Plan

Every Investment Consulting Associates project is structured to ensure that quality is ensured in multiple ways:

- Client needs, goals, and expectations are identified and met
- Work is done well, completely, and correctly, and
- Results are communicated clearly and completely

Quality is planned for and managed through the "Plan-Do-Check-Act" cycle for project execution and program management

ICA assigns a Project Lead for every project.The Project Lead (PL) is responsible for

- Documenting customer expectations and consensus quality management objectives at a project-level that supports the implementation of the Project Management Plan (PMP).
- Utilizing the expertise of their project delivery teams to determine the procedures necessary (such as independent technical review) to achieve the target level of quality.
- Ensuring the customer endorses all objectives included in the PMP.
- Understanding the customer's role in project success; the PL's relationship with the customer is pivotal to providing quality service
- Working with the customer early in the Project Scope and Customer Requirements Definition Process to determine customer needs, and refining those requirements in light of fiscal, schedule, changing requirements, stakeholder buy-in, and other constraints; considers the cost/benefit of all quality improvements.

The Project Team (PT) is responsible for

- Delivering a quality project
- Performing an active role to ensure the customer's objectives are clearly articulated and that the customer understands how the work performed works to accomplish those objectives
- Monitoring the quality of their own work
- Keeping the commitments for completion of their portion of the project, as documented in the Project Management Plan

Project Management Plan Content

Plan

- Identify the customers Quality Objectives. Help customers express expectations in objective, quantitative terms.
- Identify professional standards including legal, environmental, economic, and cultural.
- Balance needs and expectations of customers and stakeholders with cost, schedule, and professional standards. Evaluate the costs and benefits of selected objectives and the processes to be used to achieve objectives.
- Develop an effective plan and processes, including quality assurance and quality control procedures, to achieve objectives. Consider risk factors and complexity of the project and adapt processes to provide the requisite level of quality. Document in the risk management plan any project variations from the local PMP requirements.
- Develop performance measure thresholds to ensure agreement on the definition of success relative to Quality Objectives.
- Ensure customer endorsement of all quality objectives included in the Project Management Plan.

Do

- Do the work according to the approved PMP and standard operating procedures.
- Project execution is a dynamic process. The PT must communicate, meet on a regular basis, and adapt to changing conditions. The PMP may require modification to ensure that project objectives are met.
- Document lessons learned as required.

Check

- Perform independent technical review, management oversight, and verification to ensure that quality objectives are met.

- Check performance against the PMP and Customer Objectives measures thresholds to verify that performance will accomplish Objectives and to verify sufficiency of the plan. Share findings with all project stakeholders to facilitate continuous improvement.

Act

- If any fault is found in delivery or any threshold exceeded, take specific corrective actions to fix the systemic cause of any non-conformance, deficiency, or other unwanted effect.
- Document quality improvements that could include appropriate revisions to the quality management plan, alteration of quality assurance and control procedures, and adjustments to resource allocations.

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

While the team is ready to begin work immediately, we recommend a start date of no later than July 15.

5. Discuss your transition plan to begin providing services.

As described in the project scope, we strongly recommend beginning the project with a "Task 0 - Project Launch and Team Coordination"

We find that the most successful projects begin with establishing a strong working relationship.The project depends on the ability to exchange data and ideas as a part of reaching successful conclusions and delivering a realistic, actionable plan.We will work directly with City staff to put this foundation in place. We will work directly with City staff to construct this critical foundation.

Steering Committee

In our experience, we find that projects of this nature have the best opportunity for success when guided by a small steering committee.If the steering committee has not yet been identified, we can help create one which would include key members from City government and staff.This - if desired - could be augmented by community leaders, other stakeholders, and members of the business community.Such a committee allows for diversified but manageable input throughout the project and builds early-stage buy-in on solutions.

It is important to note that this steering committee does not supplant the working relationship between the ICA Team and the City of Kansas City, but instead creates a working group that can help present insight and who will help ensure community buy-in and support for the eventual plan.

Project Kickoff Meeting

The project kickoff meeting will take place in person within two weeks of the project commencement date.Project goals will be discussed and confirmed, as well as dates chosen for regular update meetings.We will review the project schedule and confirm the scope of work.

In addition to the kickoff meeting with City of Kansas City staff, we suggest scheduling a meeting with the steering committee soon after the project start.The goal of this meeting is to get honest answers to questions while obtaining a good feel for the environment and political context.While already well acquainted with the City, we also request that a member of the City of Kansas City staff accompany us on a driving tour of the City of Kansas City to examine some of the key areas.

Regular Conference Calls

We propose holding regular update calls on a biweekly schedule at a pre-determined time and day of the week.Some of the calls will be conducted with voice only while others will feature interactive Go-To-Meeting sessions if specific materials need to be discussed.We recommend key City staff and the project manager be present on the call, as well as members of the Steering Committee noted above.

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

To try to isolate the effectiveness of incentives, we will work to identify other factors that might impact development trends or business performance.For example, Kansas City has implemented two bus rapid transit (BRT) routes called MAX in/near downtown and most recently implemented a streetcar: http://kcstreetcar.org/route/economic-development-2/So, if the city also executed a TIF on certain properties or areas to help encourage development, how do we know how to attribute impact to the TIF versus the streetcar or MAX?To at least start to understand this, we will need assistance from the city to identify and collect info on other city investments and external factors. At a qualitative level, we may want to include interviews with local development leaders to help disentangle these effects.

Based on our team's experience in evaluating incentive programs in the State of Maine, we also recommend running a survey to ask "recipients" of incentives some questions about how the incentive helped them achieve their business goals or address a particular risk.This may take the form of one survey for businesses receiving tax abatements (or similar) to locate/expand and grow jobs, and one survey for developers or property owners about the activity level on their sites (businesses, jobs, residents, etc.).

Further discussion on the items above is included in the approach section, and we would welcome a conversation with the City of Kansas City on how best to introduce these into the approach.

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

Kansas City has been implementing a range of economic development incentives for over 25 years to help create a vibrant downtown and attract/retain businesses and jobs.Many of these incentives, in particular tax increment financing (TIF) applied to high-profile redevelopment projects, are well-known and debated by development experts, public officials, and the general public.However, Kansas City does not have the information to credibly assess the actual impacts and benefits of those incentives.This creates a void of evidence to judge the effectiveness of incentives used to date, and inhibits the understanding of how future incentive packages might benefit Kansas City.

In addition, there is a strong need to better understand and distinguish the range of incentives frequently applied in Kansas City.Some incentives are more focused on helping to accelerate redevelopment (and mitigate blight) of strategic urban areas, while others may be more focused on attracting businesses or helping them to expand.The most relevant performance measures for these incentives should similarly vary - for example, tax increment financing (TIF) projects may be better measured in terms of property values, square feet of new development, and new private investment. Tax abatement projects for specific companies looking to locate or expand in Kansas City, on the other hand, may be evaluated more on job creation and wages paid.

Therefore, the objective of this project is focused on developing and applying analytical methods to estimate the various benefits and effects of economic development incentives used in Kansas City over the past 25 years.Closely related, this project will also evaluate national best practices for incentives and develop a series of policy-relevant findings regarding Kansas City incentives and how they align with the city's economic development goals and priorities.Finally, this project needs to help the city to manage, monitor, and report data on incentives and their impacts in ways that can be shared with a variety of stakeholders (Mayor's Office, City Council, economic development leaders, general public).

To accomplish this ambitious project within a relatively short time-frame, our proposal is focused on delivering a project that is:

Analytically credible and comprehensive, meeting industry standards in terms of data analysis, methods to measure impacts, and the full-range of relevant key performance indicators (KPIs).

Practical and achievable, using proven methods and analytical models and working from existing data, to ensure that we can deliver results within a meaningful timeframe.(rather than attempting overly sophisticated methods with very uncertain results)

Accessible to a wide-range of audiences, with easy to communicate presentation and final report documents.Our audience is not academic economists, and we understand that results need to be presented in ways that will help inform policy decision-making.

To implement this project, our team has intentionally been structured to include a mix of national and local experts.For example, ICA project manager Chris Steele is a national expert at evaluating incentives and has over 25 years of experience working with private and public sector clients on site selection and location decisions.Deputy project manager Dan Hodge is a national expert at evaluating economic impacts, most recently serving as Director of Economic and Public Policy Research at UMass and previously leading the economic development market analysis for the Kansas City Greater Downtown Area Plan.Meanwhile, our various local partners (Global Prairie, Shockey Consulting, and Bellewether) provide critical on-the-ground understanding of Kansas City, and extensive experience working with the full-range of stakeholders we need to engage in this project.

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.

Investment Consulting Associates was a co-founder of IncentiveMonitor.com.This database of actual incentive awards made around the globe has allowed uses to examine the amount and types of incentives being used, and has showcased best practices for incentives transparency and accountability.The New York Times used the tool in November of 2012 to write their 3-part expose on incentive practices.The database now tracks over 15,000 deals, and the data will be used as part of our analysis.

We also propose the use of IMPLAN to help estimate indirect economic effects.The approach section describes this option as well as discusses how this may help integrate findings with work of MARC (the MPO) as it also uses the REMI model for regional economic forecasting.

Through Global Prairie, we are able to offer additional stakeholder engagement and in-person briefings with key stakeholders.With our local partners, we could easily scale up the stakeholder engagement and communications of results if desired.

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.

Investment Consulting Associates takes its commitment to the environment very seriously. Enshrined in our own code of conduct to is the following statement made with regards to the environment and the priorities that all of our employees are to uphold:

"For the wider community I will:

- Be honest, open and truthful in all external communications
- Respect the customs, practices and reasonable ambitions of others

- Ensure that I am aware of, and comply with, all relevant legislation and regulations in the country where I am operating
- Respect social, environmental and wider corporate responsibility concerns, assessing the impact of my actions on the environment and society around me, and seeking to conserve resources wherever possible"

As a professional services company, our immediate impact on the environment is rather small. Within the context of our office environment, we are housed within a transit friendly neighborhood, some of our key staff eschew driving in favor of cycling, we recycle aggressively, and we purchased recycled products whenever possible.

In the context of our advice to clients, we work with communities to foster economic development which shoes whenever possible environmentally sustainable, and also which provides a pathway from traditional industry two more economically and environmentally sustainable practices for the long term.

As specific examples of this, if we have worked with communities north of Pittsburgh, PA (ARTEZ) as and in Elkhart County, Indiana to help transition traditional manufacturing bases so that they can service the needs of green business, using recycled materials, or renewable energy, and otherwise become engaged in the green economy.

We see the value and need to help communities make themselves economically and environmentally sustainable over the long run.We provide them with the insight and tools to make these transitions possible.

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.

There are limited means by which our review will positively or negatively impact environmental sustainability Within the context of the current project, there is no direct means by which. We will however note to the City any incentive program or economic development initiative that might be altered in order to better support the City's sustainability goals.

Likewise, within the actual execution of the project scope itself, we will continue to hold to our own conduct of minimizing the environmental and energy impact of our efforts.This is in part why we have constructed the project team as we have, so that local partners may address some outreach and research functions.In this way not only do we have the best possible team to address the City's needs, but we are also able to better manage and minimize the amount of travel and therefore environmental impact.

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: Pricing Estimate.docx

Pricing estimate is attached. Given the above, we project a minimum number of hours of 1,323.75 and are providing an average hourly rate for the entire team of $177.94 We will be providing data obtained from the proprietary IncentivesMonitor.com database as part of the analysis and at no additional charge.

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.

ICA 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: MTI Reference ICA KCMO 060716.pdf

Reference for Investment Consulting Associates regarding Incentives Review Project for State of Maine

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

See Attachment: Reference for Mr Dan Hodge from ARC.pdf
Reference for Mr. Dan Hodge, ICA Senior Associate

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

See Attachment: NNSA Proposer References-1.pdf
Reference for team partners Global Prairie.

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
We acknowledge the requirement within this section.

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

We do acknowledge the requirement for the performance bond, but do wish to note that bonds of this nature are fairly unusual for professional service and consulting contracts of this kind. We would welcome the opportunity to discuss the purpose for this bond.

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.pdf

2. Submit HRD Form 13.
See Attachment: Affadavit of Intended Utilization.pdf

3. Do you accept this requirement?
True
Yes, we do and we have assembled our team accordingly.

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	The City does not. Our main economic development partner, the Economic

City have an existing relationship with an economic development consulting firm?	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	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.

other cities?	
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
Yes

19. Addendum 2: Pre-Submittal Teleconference Instructions

The City will conduct a pre-submittal teleconference at 10am CT on Tuesday, June 7 th 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, we acknowledge the addendum.

20. Addendum 3: Post-Teleconference Questions and Responses

Questions	Responses
Are you	If several suppliers are creating a joint proposal, only the lead proposer would submit in

looking for submissions from all of the team member firms on a proposal or only from the lead firm?	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 find the list of certified MBE/WBE?	Please find that list at 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	References are a requirement and all suppliers should make every effort to meet all requirements of the RFP.

the due date
of June 12th?

1. Do you acknowledge this addendum?

Yes

2. Do you acknowledge this addendum?

We 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?

We acknowledge this addendum

22. Addendum 5: Urgent Notice to Respondents

URGENT NOTICE TO RESPONDENTS

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

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 would you advise that firms answer the questions with our proposed changes?	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 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	The City is seeking to complete this analysis by the Fall of 2016. However, if

complete the project firm?	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, we acknowledge the addendum.

Pricing Estimate – Investment Consulting Associates

We have prepared the following pricing estimate to cover the tasks in the proposal:

Task	**Hours**	**Fees**
Task 0 – Project Launch and Team Coordination	89.00	$19,175
Task 1 - Identify Key Performance Indicators for all Incentives Programs (including stakeholder outreach)	331.75	$65,601
Task 2 - Complete a Historical Analysis of Key Performance Indicators	408.00	$67,724
Task 3 - Assist the City in Developing On-going Monitoring and Reporting Systems	495.00	$83,089
Task 4 – Ongoing Support	0.00	0
Travel and Other Out of Pocket Expenses		$ 4,000
Total	**1,323.75**	**$239,549**

Given the above, we project a minimum number of hours of 1,323.75 and are providing an average hourly rate for the entire team of $177.94

We will be providing data obtained from the proprietary IncentivesMonitor.com database as part of the analysis and at no additional charge.