



Atlanta
BeltLine
Partnership

REQUEST FOR PROPOSALS (RFP)

Organization Formation Consultant Services

for

**Business Organization Exploratory Process
for Adair Park, Capitol View, Capitol View
Manor and Pittsburgh**

PROPOSALS DUE:

5:00pm, Friday, September 11, 2020

Submit One (1) Electronic PDF Copy via Email

Business Organization Exploratory Process

Request for Proposal for Organization Formation Consultant Services

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Section A: Introduction

A.1 General Overview:

In November 2019, exploration of a potential business network or association for Adair Park, Capitol View, Capitol View Manor and Pittsburgh began with support from Atlanta BeltLine, Inc. (ABI), Atlanta BeltLine Partnership (ABP), and The Annie E. Casey Foundation's Atlanta Civic Site. The formation of an organization to represent the interests of businesses in southwest Atlanta (that are not currently organized) is aligned with Atlanta BeltLine Inc. and Atlanta BeltLine Partnership's community and economic development strategies. To support the effort, the Annie E. Casey Foundation awarded a grant to fund the exploratory and planning process.

To date, the purpose and goal of this initiative has been developed via a series of meetings with stakeholders including businesses, residents and community organizations in the proposed organization's target area. Those discussions produced a focused set of organizational goals. A Working Group for the initiative's exploratory phase came out of this process as well. The information gathered has set the stage for furthermore detailed exploration of the steps necessary to move forward with forming the organization.

Having completed the initial process of outreach to stakeholders, it is time to proceed to the next steps of putting the proposed organization's goals and objectives into action.

A.2 Purpose of Solicitation:

The purpose of this solicitation is to vet, select and engage a consultant to lead next steps for this business organization exploratory process with technical guidance necessary to facilitate formation of a business organization.

A.3 Organizational Overview:

The Working Group represents a variety of differing business disciplines and is seeking the support of an expert to guide the group through the business association formation process. The Working Group is a diverse group of business owners from the proposed organization's target area. They represent the Adair Park, Capitol View and Pittsburgh core target area neighborhoods as well as nearby neighborhoods with shared challenges, interests and goals. Currently they included the following neighborhood representation:

- Adair Park – four (4) members
- Pittsburgh - five (5) members from
- Capitol View – two (2) members
- “At Large” – four (4) members

A Stakeholder Advisory Group or Steering Committee is the group typically developed through the official project process and would be created by the consultant. The consultant would coordinate closely with the Steering Committee to execute the formation of the organization. The successful respondent will be expected to coordinate with the businesses and develop that committee. The Steering Committee will represent the needs of the target membership for the potential organization.

A.4 Target Area Overview

The organization's proposed target area is referenced on the map in the appendix and is focused on the neighborhoods of Adair Park, Capitol View, Capitol View Manor, and Pittsburgh neighborhoods. The target area defined above is not currently represented by an existing business association. Adjacent neighborhoods are of interest to the organization for collaboration once the association is formed. However, since they are currently covered by other business associations, they will not be targeted for this process. These neighborhoods and their existing businesses will remain on the Stakeholder Advisory Group's "radar" for communication and potential collaboration going forward. This element is of key importance to the Working Group and their vision for the organization.

There are 348 licensed businesses located within a half-mile radius of the Atlanta Beltline's Southside Trail West. The organization's proposed footprint captures a smaller portion of that total area and number of businesses; however, it gives some idea of the long-term potential membership pool. Further research of the target area may determine a number more specific to the target area.

The discussion surrounding the organization's Target Area should focus primarily on the footprint that makes logistical sense to pursue. An aspirational footprint should be considered as a long-term goal to be pursued if, and when, the concentration of businesses in adjacent neighborhoods increases. Collaboration with existing business and neighborhood associations in those areas may serve as a bridge in the interim.

Section B: Goals and Objectives

B.1 Organizational Focus

Defining and finalizing the organization's boundary is a key goal identified by the Working Group. The final geographic footprint which will bring potential membership into focus for outreach and intake planning. It will also serve to **bring clarity to** primary and secondary goals for the organization's initiatives and advocacy.

Transitioning from the exploratory phase's Working Group to a permanent governing structure is necessary for the organization to properly function once formed. The Working Group is seeking a consultant to coordinate with the Stakeholder Advisory Group in developing the structure and processes that will identify and engage business owners who will be committed to guide and build the organization to work on behalf of its membership and the community at large.

The primary purpose of the organization will be to **Connect, Advocate and Communicate** on behalf of its membership and the community at large. Other priorities of the organization include but not limited to: promoting networking among the organization's membership, as well as with non-member businesses in the surrounding community; advocating for the organization's membership with public sector entities and establishing a platform for effective regular communication between the proposed organization and city government and the business community at large. Regular meetings may be employed as an option to facilitate regular and effective communication.

Collaboration with Residents, Businesses, Neighborhood Organizations, City of Atlanta, Atlanta BeltLine, Area Developers and Property Owners, and other agencies/partner organizations is a high priority identified during the organization's exploratory phase. Efforts to promote member

businesses are a high priority for the Working Group. Their vision includes but is not limited to utilizing special events and targeted outreach to market member businesses and the business district as a whole. All efforts should positively impact or contribute to the membership's successful business operations.

The Working Group has identified the need for effective administrative and back-office systems. These include but are not limited to email, document management, calendars/scheduling and online membership management software

B.2 Mitigation of Gentrification

Given that the organization's target area covers several City of Atlanta core neighborhoods, strategies must be put in place to mitigate the negative effects of rapid gentrification. As population growth and development pressure attract new residents and businesses there is the prospect of displacement and other unwelcome change to the area's business community. Maintaining the area's current businesses and residents in the face of rising property values and rents is an ever-increasing challenge.

As one of the Working Group's stated concerns, developing initiatives to assist membership in combating gentrification's negative effects through meaningful community and business engagement will be a critical ongoing action item.

B.3 Business Retention

One of the Working Group's stated goals is to focus on retention of existing businesses in the organization's target area. As demographics, trends and tastes in the area evolve there is potential for existing businesses to experience reduced demand for their offerings and/or increased displacement pressures. Conversely, this change will create new opportunities for businesses to profit by developing new lines of business in response.

The organization intends to serve as a resource for existing businesses to remain resilient, viable and competitive in the dynamic marketplace. By providing support to member businesses, the organization will use its marketing platform(s) and communication network(s) to keep its membership on the cutting edge of emerging trends.

It is especially important to the Working Group that longstanding businesses be given the support they need to remain viable and vibrant members of the business community. The proposed organization's target area contains a great deal of institutional capital from these businesses that have helped shape the surrounding community for decades. These businesses represent considerable community memory and knowledge that would be sorely missed. The development of a business organization represents a once in a generation opportunity to maintain that knowledge and push these businesses toward many future decades of successful operation which will continue to shape the surrounding community.

Section C: Scope of Services

C.1 Formation Planning

The successful respondent will be engaged to plan and execute on the formation of the organization. This includes examining options for organizational structure (501c3, LLC, etc.) and making a final selection. These tasks will be done with limited feedback from the Working Group.

The successful respondent will be responsible for leading the Stakeholder Advisory Group for planning their transition to an operational leadership structure. This exercise will establish the necessary steps for selecting, swearing in and handing over administration duties to the selected leadership. To date the Working Group has considered structuring the organization's long-term operational leadership as a dedicated person to manage governance, communications and systems working in combination with a volunteer board of directors.

The consultant will assist the Stakeholder Advisory Group in finalizing the selection of a "customer facing" name for the organization. The name should reflect the proposed organization's goals of Connecting (networking), Communicating, Advocating, Development and Preservation of History. The name should also inspire unity among businesses represented by the proposed organization.

Once an entity structure is selected, the consultant will assist the Stakeholder Advisory Group in completing and filing all necessary documents to establish the organization as a legally recognized body. If any professional assistance outside the consultant's capability is required, it should be identified in the RFP response. Respondents should also note whether or not fees for any outside professional assistance is included under the respondent's final proposal price or if it will be charged in addition to their proposed price. The response should also include any fees related to the filing process for creating the organization.

The successful respondent will assist the Stakeholder Advisory Group in analyzing the organization's proposed footprint to determine the initial geographic boundary. They should also include analyzing the proposed footprint in assessing the proposed organization's potential membership pool, fee structure, and operational budget.

C.2 Membership and Recruitment

Each proposal must present the respondent's plan to create a membership outreach program for the purpose of creating a database of potential members that the organization may maintain for use in their ongoing member recruitment efforts. The plan must present a clear methodology for engaging potential members and must be executable by the organization's leadership without an excessive learning curve and/or specialized training.

C.3 Membership Orientation

Each proposal must present the respondent's plan to craft an effective program to bring new members on board. The plan should include detailed processes that will allow the organization to educate new members on their rights and duties as members as well as the benefits of membership.

C.4 Organization Documentation & Filings

Each proposal must present the respondent's plan to assist the Stakeholder Advisory Group in securing its designation as the selected organizational entity as discussed in Section C.1. This includes preparing all documents necessary to secure all approvals and registrations for designation.

Section D: Evaluation Criteria

D.1 Experience

Please use this section to explain your expertise in executing the formation of location-based business associations. Please detail your experience in creating organizations for the purpose of local business advocacy, networking and collaborative organization. Include any relevant examples, concepts and/or experience-based anecdotes that illustrate the respondent's ability to execute the Scope of Services as detailed in Section C above.

D.2 Formation Philosophy & Approach

Please use this section to detail your proposed approach to forming the proposed organization which will set the stage for successful and sustainable operation by its leadership. Include any examples, concepts and/or experience-based anecdotes that illustrate the respondent's ability to execute the Scope of Services as detailed in Section C above.

D.3 Local Experience/Cultural Competency

Please use this section to explain your familiarity with the subject area. Cultural competency and experience working in the target area and/or Metro Atlanta areas similar to the subject area. Please also include any experience working in core urban neighborhoods located in other metro areas with similar demographic and economic characteristics.

D.4 Under-Resourced Business Experience

Please use this section to explain your expertise and familiarity in dealing with the challenges present in the project area. Sensitivity to the challenges of working with urban, BIPOC (Black, Indigenous, and People of Color) and/or Minority Business Enterprises (MBEs) is of specific interest to the Working Group. RFP responses should exhibit the respondent's history of working with black-owned businesses located in urban communities with characteristics similar to the target area.

Given the target area's history of demographic and economic challenges, the Working Group is deeply committed to finding a consultant who is sensitive to the target area's unique needs. Please make note of any examples, concepts and/or experience-based anecdotes that illustrate the respondent's ability to address these unique challenges.

D.5 Fee for Proposed Services

The allotted budget for this contractual engagement should not exceed Eighteen Thousand Dollars \$18,000.

Submissions will be judged based on effective use of funds toward the successful achievement of the organization's goals. Respondents should exhibit their ability to achieve as many of the proposed organization's stated goals within the budget parameters specified above as well as all fees related to start-up costs for the organization.

D.6 Evaluation Criteria

The following evaluation criteria will be used as the basis for the evaluation of proposals submitted in response to this RFP.

CRITERIA	WEIGHT
Relevant Project Experience:	40%
- Consultant / Team Qualifications	10%
- Relevant Projects	15%
- Past Performance in Similar Communities	15%
Formation Philosophy & Approach:	30%
- Creativity	10%
- Timeframe	10%
- Deliverables	10%
Local Experience / Proximity:	10%
Under-Resourced Business Experience: (Female, BIPOC, Veteran Business Enterprises)	10%
Fee/Cost:	10%
TOTAL PERCENTAGE = 100%	

D.7 Notification of Selection

Upon completion of the evaluation responses, notification of the firm selected will be posted to the Atlanta Beltline Partnership website.

Section E: Submission Requirements

E.1 Document Format

Proposal submissions should be organized per the Evaluation Criteria outline shown above which will assist in the review and scoring process. Submissions will not exceed ten (10) pages with attachments.

E.2 Due Date

All proposals are due by the date and time listed below in Section F.1, Overall Timeline.

E.3 Delivery / Transmission Requirements

Given the restrictions to our ability to conduct business as “normal” due to the COVID-19 crisis, all proposal submissions will be accepted in digital format only. All submissions must be consolidated into a single pdf document. Please submit your RFP response package via email to info@atlblp.org. The Selection Team reserves the right to reject or disqualify any bids it deems non-responsive.

Section F: Schedule / Timeline

F.1 Overall Timeline

Request for Proposals Posted Thursday, August 27, 2020

Respondent Submissions Due 5:00 pm, Friday, September 11, 2020

Contract Award Week of September 28, 2020

F.2 Milestone Descriptions

Request for Proposals Issuance: The Atlanta Beltline Partnership will issue the RFP package via posting on their website www.beltline.org and will post on social media through Instagram, Facebook, LinkedIn, and Twitter about the engagement. Stakeholders will be encouraged to share the RFP with their networks.

Letter of Award: Once a selection has been made, The Atlanta Beltline Partnership will issue the successful candidate a Letter of Award and template contract. Upon award both parties will finalize terms of the consulting agreement to be executed. Dates shown for this item above in Section F.1, Overall Timeline, may be adjusted as needed.

Notice to Proceed: Once terms have been finalized, the agreement will be executed by both parties allowing work to begin. Dates shown for this item in the timeline above in Section F.1, Overall Timeline, may be adjusted as needed.

The Request for Proposal Timeline is subject to change at the sole discretion of the issuing body. Any change will be issued to interested parties via an addendum as necessary.

Section G: Appendix

G.1 Target Area Map

