

TITLE
OFFICE OF ECONOMIC VITALITY
Evaluation of Non-Competitive Economic Development
Project Proposals Policy

ORG. AGENCY
 Blueprint
 Intergovernmental
 Agency
FINAL

114.01 STATEMENT OF POLICY

This Policy is intended to provide criteria for the evaluation and determination of funding of non-competitive economic development proposals from the economic development portion of the sales tax proceeds allocated to the Office of Economic Vitality (OEV). The existence of this Policy is not intended to create any grant or funding program. The award of any funds is subject to the availability of funds, the approval of the IA Board, and the requirements of this Policy.

114.02 AUTHORITY

Chapter 163.01(7), Florida Statutes
 Section 212.055, Florida Statutes
 Second Amended and Restated Interlocal Agreement
 OEV's Economic Development Strategic Plan, as may be amended

114.03 DEFINITIONS

- a. Capital Investment: An investment by a company to pursue its objectives, such as continuing or growing operations. It also can refer to a company's acquisition of permanent fixed assets such as property, plant and equipment.
- b. Competitive Project: An economic development project where a business is considering expansion or relocation in Tallahassee-Leon County against other potential communities and typically involves the use of incentives and negotiation to induce the business to decide to locate locally. These projects typically align with the OEV strategic plan, target industries, create/retain jobs, and demonstrate capital investment.
- c. Economic Development: A coordinated course of action across all local assets and resources to facilitate the development, attraction and cultivation of innovative businesses and associated job creation to position the economy for sustained, directed growth raising the quality of living for the citizens of Tallahassee-Leon County.
- d. Eligible Applicant: Eligible applicants under this Policy are for-profit or non-profit organizations who are currently registered with the Florida Department of State, and are headquartered in the Tallahassee – Leon County area; a unit of a state or local government in the Tallahassee – Leon County area engaged in economic development activities; and public educational institutions located in and serving the Tallahassee- Leon County area. Eligible

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applications must meet the goals of the OEV strategic plan and receive a majority vote of the IA Board for evaluation by staff.

e. Intergovernmental Agency Board of Directors (IA Board): Governing body of the Blueprint Intergovernmental Agency, consisting of the City and County Commissions, as provided for in the Interlocal Agreement, and referred to herein as “IA Board”.

f. Non-Competitive Economic Development Project: A non-competitive economic development project is an economic development project having a general public purpose which supports the improvement of the local economy within the Tallahassee – Leon County area and has demonstrated alignment with OEV’s Strategic Plan, create/retain jobs, and demonstrate a capital investment into the community. The entity proposing the project is not seeking to expand or locate its operations in a different country, state, or in municipalities within the state of Florida. These projects are non-competitive as they are not relying upon the assistance of the local economic development organization and/or provision of incentives to win the project among competing jurisdictions in other cities or states.

g. Office of Economic Vitality: The local economic development organization for the City of Tallahassee and Leon County Government, as defined in section 288.075, Florida Statutes.

h. Office of Economic Vitality Economic Development Strategic Plan: The Economic Development Strategic Plan of the Office of Economic Vitality is a coordinated course of action across all local assets and resources to facilitate the development, attraction and cultivation of innovative businesses and associated job creation to position the economy for sustained, directed growth raising the quality of living for the citizens of Tallahassee-Leon County. The plan, as may be amended, containing plans or goals to enhance the quality of the local economic base, improve community "infrastructure" for economic development and develop leadership and cooperation for the implementation of a local economic development strategy.

i. Targeted Industry Study: Identifies four industry sectors that contribute to private sector job growth, wealth creation, and a diversification of the economy. These industries have a strong potential for growth and interconnect with each other, which maximizes resources and enhances opportunities for innovation and sustainable economic vitality. For Tallahassee-Leon County these industries include: applied sciences and innovation, manufacturing & transportation/logistics, professional services and information technology, and healthcare.

114.04 INELIGIBLE PROJECT PROPOSALS

The following project proposals will be deemed ineligible and will not be considered for funding:

a. Project proposals that do not have a general public purpose of improving the local economy of the Tallahassee – Leon County area, pursuant to section 212.055(2(d)(3), Florida Statutes and do not meet the goals of the economic development strategic plan,

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- to create/retain jobs, and make a capital investment into the local economy.
- b. Project proposals from individuals.
 - c. Project proposals from entities that are not eligible applicants as defined in section 114.03(d) of this policy.
 - d. Project proposals that have not received direction from the IA Board to be reviewed and analyzed by the Office of Economic Vitality.
 - e. Project proposals that propose OEV funds be used, directly or indirectly, in whole or in part, to support or oppose any political party, campaign, or candidate, or engage in lobbying the Intergovernmental Agency Board of Directors.
 - f. Project proposals from applicants with documented unsatisfactory performance under prior OEV, City, County, State or Federal awards or programs. Documented unsatisfactory performance includes but is not limited to cancellation letters, notices of non-compliance, or substantiated written complaints regarding the applicant.

114.05 CRITERIA FOR EVALUATION OF PROJECT PROPOSALS

A. OEV shall use the following criteria to review and score a request for funds to support a non-competitive economic development project proposal following IA Board approval or direction to review such proposal:

- 1) The project's demonstrated alignment with OEV's Strategic Plan as outlined at <https://oeforbusiness.org/wp-content/uploads/10.12.2016-OEV-Strategic-Plan.pdf>, and as may be amended.
- 2) The project's demonstrated alignment with OEV's Targeted Industry Study.
- 3) The project's demonstrated ability to create or retain jobs with at least a livable wage.
- 4) Demonstrates a capital investment into the community for the general public purpose of improving the local economy.
- 5) The project's demonstrated return on investment, including the ability to improve the local economy through land/infrastructure improvements, research and development, and economic inclusion through the support of minority and women owned enterprises.
- 6) The project's sustainability, including the extent to which the project demonstrates support from local stakeholders (private, public, and non-profit entities, etc.) and is aligned with and integrated into other public or private investments currently ongoing or planned for the local community.
- 7) Submission to OEV of the following documents from the applicant supporting the applicant's organizational, financial, and management capacity:
 - a. Certification from the Florida Department of State, Division of Corporations as to the current corporate status of the applicant (non-profit and for-profit corporations only).
 - b. Copy of the Articles of Incorporation of the applicant (non-profit and for-profit corporations only).
 - c. Documents reflecting the organizational, management, and financial structure of the applicant (including but not limited to bank statements, filed tax returns, audited financial

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statements and reports, organization chart, resumes of management/leadership team responsible for project activities and deliverables).

d. Recent independent market analysis, performed at the applicant's expense, evaluating the economic development impact of the proposal to the Tallahassee – Leon County area (required for requests exceeding \$100,000).

e. Proposed budget and proposed Scope of Work for the project.

f. Detailed deliverables for the project.

8) The project's feasibility and the likelihood that the project will achieve its projected outcomes.

9) The applicant's performance under previous grant or assistance awards, including whether the applicant as a grantee submitted required performance reports, data, or deliverables.

10) Whether the project proposal, in whole or in part, is consistent with or in compliance with local, state, or federal laws, ordinances, policies, rules, and statutes, or inconsistent with or in violation of the Blueprint Intergovernmental Agency's Second Amended and Restated Interlocal Agreement, Bylaws, policies, agreements, or IA Board direction.

11) The availability of OEV funds based on other OEV project (competitive and non-competitive) funding obligations, and approved or projected budget.

12) The availability and committed nature of cost sharing by the applicant or matching funds. See section 114.07 regarding documentation of cost sharing or matching

13) Favorable programmatic review and recommendation by the Economic Vitality Leadership Council (EVLIC).

114.06 REQUEST FOR CLARIFICATION, ADDITIONAL DOCUMENTATION

At any time during its review, OEV may contact the applicant or entities and persons to request any necessary additional documentation to clarify or substantiate submitted application materials, depending on the type of project proposed. OEV will provide applicants a reasonable amount of time to provide any additional documentation. Applicants agree to execute any releases to allow OEV to obtain information needed to evaluate the project proposal. Failure to provide complete and accurate supporting documentation in a timely manner when requested by OEV may impact the funding recommendation.

114.07 DOCUMENTATION OF COST SHARING OR MATCHING

If applicable, the applicant must document that the matching share will: (i) be committed to the project for the period of performance, (ii) be available as needed, and (iii) not be conditioned or encumbered in any way that may preclude its use consistent with the requirements of OEV's investment assistance. To meet these requirements, applicants must submit for each source of the matching share a commitment letter, board resolution, or equivalent document signed by an authorized representative of the organization providing the matching funds. Additional documentation may be requested by OEV to substantiate the availability of the matching funds. Documented in-kind contributions may provide the cost

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sharing or matching. Examples of in-kind contributions may include space, equipment, services, or forgiveness or assumptions of debt.

114.08 FUNDING RECOMMENDATION

A. Based on the scoring of the criteria contained in this Policy, OEV shall prepare funding recommendations to fund or not fund the non-competitive economic development project proposal. Recommendations to fund may be for an amount less than the amount requested by the applicant. All recommendations shall be in writing and submitted by Agenda Item at a scheduled IA Board meeting.

B. Approval or disapproval to fund a project proposal shall be granted by the IA Board based on the recommendation of OEV, and on the availability of funding.

C. If a non-competitive economic development project proposal is selected for funding, an agreement with specific terms, conditions, tasks, or deliverables will be entered into by the applicant. By signing the agreement the applicant agrees to comply with all provisions. If an applicant is awarded funding, neither OEV nor the IA Board have any obligation to provide additional funding in connection with that award or to make any future award(s). Amendment of an agreement to extend the period of performance is at the discretion of OEV.

114.09 FORMS AND OTHER DOCUMENTS

OEV shall have the authority to develop and use forms, agreements, scoring matrix, and other documents necessary to implement the requirements of this policy.

114.10 EFFECTIVE DATE

This policy shall be effective on September 27, 2021, upon approval of the IA Board.