

PROPOSAL FOR THE CITY OF MARICOPA

RFP #16-12

Development of Economic Development Strategic Plan



Submitted by:

IO-INC
3104 E. Camelback Road, Suite 1000
Phoenix, AZ 85016
July 28, 2016

SECTION 1: OFFER SHEET



39700 W. Civic Center Plaza
 Maricopa, AZ 85138
 Ph: 520.568.9095
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 www.maricopa-az.gov

**REQUEST FOR PROPOSALS
 (RFP) # 16-12
 DEVELOPMENT OF ECONOMIC DEVELOPMENT STRATEGIC PLAN
 FOR THE
 CITY OF MARICOPA, ARIZONA**

INTRODUCTION

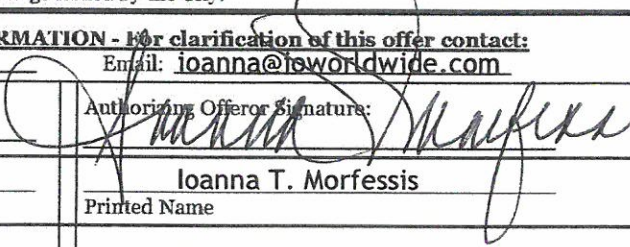
The City of Maricopa "City" will accept competitive sealed proposals from a properly qualified firm to develop a **Development of Economic Development Strategic Plan for the City of Maricopa** at the address or physical location until the date and time detailed below. Proposals shall be delivered to the location listed below and shall be in the actual possession of the City on or prior to the exact date and time indicated below. Late proposals will not be considered.

Proposals shall be submitted in a sealed package with "RFP #16-12 Development of Economic Development Strategic Plan for the City of Maricopa, Arizona" and the Offeror's name and address clearly indicated on the front of the package. All proposals shall be completed in ink or typewritten. Offerors are strongly encouraged to carefully read the **entire** Request for Proposal (RFP).

Pre-Bid Conference Meeting:	Tuesday, June 28, 2016 9:00 AM – 11 AM MST (Arizona Time)
Proposal Due Date:	Thursday, July 14, 2016
Proposal Time:	5:00:00 PM MST (Arizona Time)
Number of Qualifications:	1 unbound original and 5 bound copies (please label original)
Contact:	Kathleen M. Shipman, Purchasing Manager
E-Mail:	Kathleen.Shipman@maricopa-az.gov
Mailing Address:	39700 W. Civic Center Plaza, Maricopa, Arizona 85138
Location:	39700 W. Civic Center Plaza, Maricopa, Arizona 85138

OFFER

To the City of Maricopa: The undersigned on behalf of the entity, firm, company, partnership, or other legal entity listed below offers on its behalf to the City a proposal that contains all terms, conditions, specifications and amendments in the Notice of Request for Proposal issued by the City. Any exception to the terms contained in the Notice of Request for Proposal must be specifically indicated in writing and are subject to the approval of the City prior to acceptance. The signature below certifies your understanding and compliance with the Terms and Conditions contained in the Request for Proposal package issued by the City.

OFFEROR CONTACT INFORMATION - For clarification of this offer contact:	
Name: <u>Ioanna Morfessis</u>	Email: <u>ioanna@ioworldwide.com</u>
Federal Employer Identification Number: <u>20-0860964</u>	Authorizing Offeror Signature: 
<u>IO.INC</u> Company Name	<u>Ioanna T. Morfessis</u> Printed Name
<u>3104 E. Camelback Rd., Ste. 1000</u> Address	<u>President</u> Title
<u>Phoenix AZ 85016</u> City State Zip Code	Telephone: <u>602-626-8560</u> Fax: <u>602-626-8562</u>

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SECTION 3: LETTER OF TRANSMITTAL



July 28, 2016

Ms. Kathleen Shipman
Purchasing Manager
City of Maricopa
39700 W. Civic Center Plaza
Maricopa, Arizona 85139

Re: RFP 16-12 Economic Development Strategic Plan

Dear Ms. Shipman,

IO.INC is honored to be considered for the opportunity to work with the City of Maricopa in the development of its new five-year economic development strategy. Our history with Maricopa goes back to 2004, when we were part of the City's "startup" team for five years and worked to help create an economic development function, vision, program and projects.

For this very worthy work with the City of Maricopa, we are approaching this opportunity as another platform upon which to strengthen an already incredibly important and long-term, treasured relationship for our firm, and not simply as a consulting engagement that is delivered without regard to how it will affect the community over the long term.

In the past 12 years, we have worked with many communities in Arizona and throughout the U.S. in the development of economic development strategies, implementation plans and metrics. We are very proud of our work and the many measurable results and outcomes it has produced for these communities - rural, suburban and urban. We fully understand and are eminently qualified to deliver on all of the products and services required in the RFP.

IO.INC is very familiar and comfortable working with the public sector, and we are committed to working side-by-side with the Maricopa Project Team in a highly collaborative, inclusive manner. Our team also brings a distinctive, demonstrated track record of working effectively with a broad range of stakeholders and interests toward a common goal. We also have had leadership responsibility for developing and overseeing such strategies and related programs in public sector and private-public economic development organizations at the local, regional and state levels. We are quite agile in adapting to changing dynamics and schedules, dealing with a multitude of stakeholders, and responding to emerging opportunities and unforeseen challenges.

We commit to bring all of our considerable resources to assist Maricopa with this critically important enterprise to ensure that the economic development strategy we produce in close collaboration with the Maricopa Project Team will result in high quality and desirable employment, earnings and economic development opportunities for the people and businesses of Maricopa - those who have established their lives and livelihoods in the community today, and those who are yet to come in the future.



Mr. Kathleen Shipman
Continued, Page 2 of 2
July 28, 2016

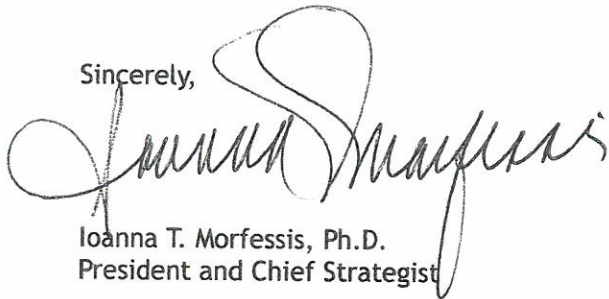
As the President and sole owner, I am authorized to make these representations on behalf of IO.INC, all subcontractors and to bind the firm to a contract with the City of Maricopa. My contact information:

Ioanna T. Morfessis, Ph.D.
President and Chief Strategist
IO.INC
3104 E. Camelback Road, Suite 1000
Phoenix, AZ 85016
P: 602-626-8560
F: 602-626-8562
E: ioanna@ioworldwide.com

Ms. Shipman, we take great pride in our work, and invest a great deal of heart and soul into the communities we are privileged to work with, and Maricopa will continue to be the recipient of our deep and abiding commitment. We commit to do our utmost to ensure that the Maricopa is able to successfully position itself as one of the most desirable and sustainable communities in the U.S. that effectively and consistently attains quality business growth, investment, and job creation in the 21st century global economy. Our promise to you is to deliver an original, evidenced-based, ambitious yet practical strategic economic development framework and action agenda that will enable the City of Maricopa to achieve enduring and sustainable economic development success in the short, mid, and long term.

Thank you again for this opportunity. I look forward to hearing from you soon.

Sincerely,



Ioanna T. Morfessis, Ph.D.
President and Chief Strategist

SECTION 4: FIRM OVERVIEW

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Founded in 2004, IO.INC is a visionary consulting practice specializing in growth strategies – envisioning, developing and recommending road maps to help organizations, communities and companies grow. IO.INC’s principals have worked with cities, counties, regions and states on economic development, entrepreneurship and talent retention/recruitment; Global 1000 companies; national real estate developers; mid-cap firms; nonprofits and higher education institutions. The firm has conducted ground-breaking research to identify emerging global and domestic growth and business opportunities for its private, public and nonprofit clients across a broad range of sectors and enterprises. We bring these same approaches to helping organizations and communities create competitive advantage in economic development.

The firm offers four top-tier services, including:

- ◆ **Growth Strategy:** Competitive analyses for organizations, companies, sectors, cities, regions and states; business strategy development; competitive market intelligence; business and consumer trend forecasts and analyses; identifying and evaluating merger, acquisition and new market opportunities; access to capital.
- ◆ **Economic Development Consulting:** Economic development analysis and strategic planning; SWOT analysis; industry cluster studies; creation of national and global growth opportunities; identifying and targeting leading firms and technologies; developing strategies to optimize growth and minimize disadvantages; marketing and positioning.
- ◆ **Business Location/Site Analysis:** Identifying prime business location opportunities for clients and representing them through the evaluation and prioritization process; assessing the feasibility of locations for commercial development and preparing strategies to enhance corporate competitive position and market entry.
- ◆ **Organizational Development:** Strategy development; fundraising; board and stakeholder cultivation and development; creation of public/private partnerships; organizational capacity building; management and staff development; marketing and positioning.

Our team brings a distinctive portfolio of experience in the public and private sectors with a demonstrated track record of working effectively with a broad range of stakeholders and interests toward a common goal. Members of our team also have had leadership responsibility for developing and overseeing such strategies and related programs in public and private-public economic development organizations at the local, regional and state levels. We are very comfortable and accustomed to working with public sector and quasi-public agencies, and are very agile and adept in responding to accelerated schedules, dealing with a multitude of stakeholders, being opportunistic to create new opportunities as well as adeptly addressing unanticipated challenges.

Combined, our team has a collective 50+ years of hands-on experience and expert knowledge in economic development strategic planning and implementation for cities, counties, regions and states; economic and workforce analyses; targeted industry and industry cluster studies; competitive analyses, and site location studies for Global 1000 and Russell 2000 companies.

Our firm is located in Phoenix, AZ, is a Subchapter S corporation, incorporated in the State of Arizona, and is 100 percent woman-owned. As a professional services firm, no state business license is required; IO.INC does have a City of Maricopa business license.

IO.INC'S Team for The City of Maricopa's Economic Development Strategy

Principal and Project Manager

Ioanna T. Morfessis, Ph.D.
President and Chief Strategist
IO.INC
3104 East Camelback Road, Suite 1000
Phoenix, AZ 85016
P: 602-626-8560
F: 602-626-8562
C: 602-616-1690
E: ioanna@ioworldwide.com
W: www.ioworldwide.com

Ioanna T. Morfessis, Ph.D., President and Chief Strategist

IO.INC is headed by Dr. Ioanna Morfessis, its President and Chief Strategist. Dr. Morfessis is regarded as one of the top economic development executives in the nation and is an internationally recognized authority on economic and community development trends. Through her consulting firm, she has developed strategic frameworks for the economic and business growth of a broad range of communities and enterprises, including many communities in the State of Arizona.

Prior to starting her own company, she was the founder of three best of class economic development organizations, where she led efforts and personally participated in the recruitment and expansion of more than 300 firms, which combined, invested over \$27 billion in private capital and generated more than 250,000 direct new jobs. Dr. Morfessis' work in the markets she served attracted billions of dollars in job creation, private capital investment and enhanced the competitiveness of the markets she served.

Since its inception, IO.INC has garnered the respect of the business, philanthropic, higher education, and media sectors. In September 2011, the International Economic Development Council awarded her its coveted Lifetime Excellence and Achievement in Economic Development award. In March 2012, Dr. Morfessis was honored by the Arizona Centennial Legacy Project as one of the state's 48 most intriguing women for her enduring contributions to Arizona's economy and quality of life. In June 2013, Commercial Executive Magazine named Dr. Morfessis as one of the 12 most influential women in Arizona's commercial real estate sector. fDI Intelligence, a division of The Financial Times of London, and GIS Planning of San Francisco, awarded their first Economic Development Innovation Award to her in October 2014. In July 2015, Arizona Business Magazine named her as one of Arizona's most influential women. She holds a Ph.D. in Public Administration from Arizona State University, with a major in economics and economic development; a Master's of Public Administration from George Washington University, and a Bachelor of Political Science from American University. She is a former Chairman and now Honorary Lifetime Member of the International Economic Development Council.

Ms. Chrisanthe T. Morfessis, CSMA - Project Management and Strategy Development

Chrisanthe "Chris" Morfessis has more than two decades of experience in marketing, promotion, special events, project management and client service, and has created successful campaigns using both traditional and new media concepts. Her management

expertise in strategic planning, resource allocation, constituent/partner relations, logistics and task execution have translated into highly successful and effective strategies for a broad range of private, public and nonprofit clients across all industry sectors. Her experience has enabled her to cultivate a rich network of seasoned industry experts, advisors, consultants and mentors that enrich the company's knowledge base and solidify her position at the cusp of market trends and shifts necessary for a competitive-edge in today's global marketplace.

Ms. Morfessis has delivered effective traditional and online multimedia campaigns and corporate identification concepts. Her expertise translates into measurable successes for clients in the following areas: Strategic Planning & Tactical Execution; Project Management; Digital Marketing & Social Media; Branding & Corporate Communications; Broadcast Production; Public, Community and Government Relations; Special Events, Trade Shows, Exhibits; Website Development, Blogs & SEO/SEM.

Ms. Morfessis worked for Clear Channel Communications (formerly Chancellor Media Group), where she managed field marketing and promotion efforts for more than 300 events and programs ranging from outdoor cultural festivals, professional sporting events and full-scale concerts to consumer buying programs and point-of-purchase contests. She also worked at Discovery Communications within a new technology division, Your Choice TV (YCTV). YCTV, a precursor to services like TiVo, was an eight market pilot test where Ms. Morfessis was heavily engaged in marketing, affiliate relations, research, promotions and programmer/cable system provider relations.

She is a two-degree alumna of Towson University in Baltimore, Maryland, with baccalaureate degrees in business administration and mass communication, and is a graduate of the Dun & Bradstreet Basic Sales Training Curriculum for rising sales professionals.

Sandra E. Price, J.D., Ph.D. - Stakeholder Engagement and Senior Strategist

Sandra Price is a seasoned expert in community and economic development. With both a Juris Doctorate and Ph.D., she has spent the majority of her career as a public service professional, serving in both paid and volunteer roles in the public and non-profit sectors, working for or representing organizations as diverse as the City of Tucson, Phoenix Economic Growth Corporation (predecessor to the Greater Phoenix Economic Council), Center Against Sexual Assault, The Nature Conservancy, the Avon Program at the O'Connor House and many others.

Dr. Price acquired a strong desire to enter academia for the purpose of teaching public policy and advocacy. She has been teaching in universities and the private sector since 2007. She also consults with governments and nonprofits, particularly in the areas of capacity building, collaborative engagement and board development. She has had extensive experience in business, community and economic research, and is an accomplished interviewer as well. In her work with IO.INC, Dr. Price has been a catalyst for elevating the levels of stakeholder engagement across a broad range of client projects, and also has conducted foremost research in such sectors as health care, medical technologies, information, communications and technology, and advanced manufacturing.

Mr. Russell Medley - Research and Strategy Development

Russell Medley is a highly intelligent and experienced analyst of business and economic conditions. His research skills, ability to interpret trends and translate research into actions for IO.INC clients have proven to be one of the most valuable assets of the firm. Mr. Medley

has extensive experience in hands-on economic development, having worked in a very large membership private-public partnership in the Chicago region, as well as in other local public sector and regional private-public economic development organizations. He also has held leadership positions in economic development organizations, private-public partnerships and nonprofits. He brings a wealth of experience in economic development, planning and research to the IO.INC Team.

Mr. Medley has had significant experience in developing economic development strategic plans, including for the Chicago Metropolitan region, rural areas in Illinois, and as a member of IO.INC's team, for the City of Scottsdale, City of Buckeye and the City of Phoenix. His extensive work in this regard includes in-depth analyses of global, national, state and local economic dynamics that impact the growth of specific economic sectors; predictive analyses to determine the highest and best impact opportunities for the selection of targeted sectors; comparative analyses of many socio-economic factors that are critical to economic development competitiveness for communities.

Mr. Medley holds a Master of Science degree in Urban and Regional Planning from the University of Iowa, and a Bachelor of Arts degree in History from Knox College (IL).

Ms. Alexandra Reese - Research and Strategy Development

Alexandra Reese is an economic development and strategic planning consultant. She is passionate about helping clients navigate challenging problems and innovate unique solutions. Ms. Reese focuses on a collaborative process through which the team: (1) frames the problem, (2) identifies objectives, (3) ideates solutions, (4) evaluates the choices (what are the impacts? to whom? over what time period?), (5) and builds consensus around the right solution.

Ms. Reese's professional and education background is in applied microeconomics, data analytics, and strategic planning. She received her B.A. in economics from Hampshire College. She now works as a Consultant at ECONorthwest, the largest economics consulting firm based in the Pacific Northwest. She also consults for IO.INC and the National Center for Smart Growth.

Mr. Danny Court - Senior Economist, Elliott D. Pollack & Co.

Danny Court is the Senior Economist with Elliott D. Pollack and Company. Mr. Court possesses exceptional research and project management skills relating to demographic, economic, and real estate data for a multitude of assignments including market studies, land use analysis, forecasting, fiscal and economic impact reports, community general plans, proposals and presentations.

Mr. Court has extensive experience in commercial market studies, Low Income Housing Tax Credit studies, affordable housing issues and initiatives and has wide-ranging knowledge of economic and fiscal impact models relating to residential, commercial, and mixed land uses as well as public events.

Mr. Court has a Master's of Business Administration from Arizona State University's W.P. Carey School of Business and earned a Bachelor of Arts degree in Economics as well as a minor in Mandarin Chinese from Arizona State University.

SECTION 5: BONDS

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Bonds are not applicable for the work required under this RFP. IO.INC has all of the requisite insurance coverage that is required by the City of Maricopa RFP #16-12.

SECTION 6: FIRM EXPERIENCE

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A. Comparable Services:

Since 2012, IO.INC has worked with several municipalities and regions in developing economic development strategies. The firm has been privileged to perform “repeat work” with several of them. Following is a brief description of just some of the representative Arizona-based projects we have worked on since 2012 (please note that we have performed similar work for other Arizona and out-of-state communities as well since 2012):

Arizona Commerce Authority - 2013 - 2016

IO.INC was selected through a competitive process to serve as a Senior Technical Advisor to the Arizona Commerce Authority (ACA), Arizona’s state-level economic development organization. In this capacity, IO.INC conducted comparative national research to recommend an ACA Rural 2.0 economic development strategy for Greater Arizona (rural communities, which represent most of the state’s land area, 25 percent of the population and more than 10 percent of the state’s GDP). In addition, IO.INC conducted an internal organizational strategic assessment; a SWOT assessment for rural communities; catalyzed significant stakeholder engagement among rural and urban business leaders, elected officials, and economic development professionals.

Reference for Arizona Commerce Authority

Mr. Keith Watkins, Senior Vice President, Economic/Rural Development

P: (602) 845-1278

E: KeithW@azcommerce.com

City of Phoenix Economic Development Strategy - 2011-2012 and August 2015

In 2012, IO.INC completed a comprehensive economic development strategy for the City of Phoenix (CED). The work entailed several phases, including: an assessment of the existing economic development climate; a SWOT analysis; comparative analysis of primary U.S. competitors; national and global factors impacting Phoenix’s competitiveness; a best practices comparative analysis, comparing Phoenix to eight other high-performing American cities; recommended metrics, and an economic development strategy designed to help Phoenix maximize its strengths and create new opportunities for success in the 21st century economy. In addition, IO.INC conducted face-to-face interviews with scores of CEOs of major employers based in Phoenix, as well as with a broad range of internal and external public and private stakeholders. The Phoenix economic development strategy was unanimously approved and adopted by the Phoenix Mayor and City Council on February 28, 2012 and presently is in its implementation phase.

Building on the economic development strategy that IO.INC developed, the City of Phoenix engaged the firm in November 2014 to update and amplify the recommended target sector-specific marketing and recruitment strategies. As part of this work, IO.INC conducted a comprehensive competitor market analysis and identified the major business location attributes that are of greatest importance to six industry sectors. In addition, IO.INC developed business case statements for each of these sectors, which are irrefutable, data-driven reports on the case for starting, locating or expanding a business in the City of Phoenix. These business case statements are being used by the City of Phoenix in its marketing and business recruitment efforts.

References for City of Phoenix Economic Development Strategy

Mr. Paul Blue, Deputy City Manager (formerly director of economic development)

E: paul.blue@phoenix.gov

P: 602-262-6941

Ms. Diane Nakagawa, Deputy Director

P: (602) 261-8013

E: diane.nakagawa@phoenix.gov

Town of Sahuarita, AZ - Completed March 2015

IO.INC was selected through a competitive process to develop an economic development strategy for the Town of Sahuarita, which is a community of about 27,000 residents located in Southern Arizona. Just 21 years old, the Town of Sahuarita is very similar to the City of Maricopa in many respects. Like Maricopa, Sahuarita has one of the highest levels of educational attainment in the State of Arizona. Sahuarita, also like Maricopa, is separated from its metro area by a Native American community, and therefore deals with perceptions of distance and isolation. The community is a bedroom community to Raytheon and the University of Arizona, and most working residents commute each day to jobs located outside of the town. IO.INC's strategy included extensive stakeholder engagement, including connecting with local, regional and state officials; major developers and investors; community and civic stakeholders including youth, arts/cultural leaders, K-12 educational leaders, nonprofit executives; entrepreneurs and many other key stakeholder groups. IO.INC also conducted comprehensive research to identify the most critical building blocks for creating a sustainable economy for Sahuarita and identified the highest impact opportunities for Sahuarita. The work culminated in a comprehensive economic development strategic framework for Sahuarita, including a five-year action-oriented implementation plan with metrics to measure progress. The economic development strategy was unanimously approved and adopted by the Town Council in March 2015, and the Town presently is in the implementation stage.

References for Town of Sahuarita

Mr. Victor Gonzalez, Economic Development Manager

P: (520) 822-8800

E: vgonzalez@sahuaritaaz.gov

City of Scottsdale - Completed August 2014; Updated February 2015

IO.INC was selected through a competitive process to develop an economic development strategy for the City of Scottsdale. The strategy included extensive stakeholder engagement, including connecting with major employers; elected officials; youth; arts/cultural leaders; K-12 educational leaders; nonprofit executives; investors; developers; entrepreneurs and many other key stakeholder groups. Individual interviews and roundtable/focus groups were convened and facilitated as well. In addition, our approach included the direct engagement of regional and state officials, business and economic development leaders. IO.INC also provided significant original research to identify leading and emerging opportunities for Scottsdale's continued economic sustainability and success, and developed a series of confidential reports on the highest impact opportunities for Scottsdale. The firm's work also entailed a comprehensive comparative analysis of Scottsdale vis-à-vis other leading U.S. cities and aspirational markets that are pre-eminent in specific sectors of the economy. A capstone for this work is the comprehensive economic development strategic framework, which included a five-year action-oriented implementation plan, specific tactics and metrics to measure progress. The economic development strategy was unanimously approved

and adopted by the Scottsdale City Council on February 17, 2015. Scottsdale's Economic Development Department began implementing many of the recommended initiatives in the Fall of 2014 and is achieving high-impact results.

Reference for City of Scottsdale

Ms. Danielle Casey, Director of Economic Development

P: (480) 312-7601

E: DCasey@ScottsdaleAZ.gov

Town of Gilbert - Completed 2012

Working with the Town of Gilbert, IO.INC completed a first-ever project for the community: the development of a far-reaching, STEM-focused economic development strategy. IO.INC worked to garner public, private and civic stakeholder input and ideas to support Gilbert's quest to further advance its already well-established technology-based economy. In addition to Gilbert's Department of Real Estate and Economic Development, IO.INC worked with Gilbert's chief elected and governmental officials, business leaders, CEOs, topical experts, citizens and entrepreneurs to help bring focus and direction for the community's economic future. In addition to preparing for and leading three stakeholder roundtable discussions, IO.INC conducted original research and presented information, trend analyses and sector-specific data that were germane to STEM-related sectors, with a specific emphasis on a competitive bio-life sciences strategy. Additionally, IO.INC conducted interviews with the Mayor, Councilmembers and CEOs in the community. The Gilbert Department of Real Estate and Economic Development integrated IO.INC's findings and recommendations into its annual report and budgetary request to Mayor and Council, which was approved and adopted in June 2012. Since the completion of IO.INC's work, the Town of Gilbert has moved successfully on several fronts in economic development, implementing many of our recommendations.

Reference for the Town of Gilbert

Mr. Dan Henderson, Director, Department of Real Estate & Economic Development

P: (480) 503-6891

E: dan.henderson@gilbertaz.gov

City of Buckeye Economic Development Strategy - Completed December 2012

The City of Buckeye selected IO.INC through a competitive process for the development of a new economic development strategy. Major requirements of the RFP included significant stakeholder engagement; analyses of major economic and demographic trends; developing messages for Buckeye's attributes and opportunities; conducting industry intelligence and analysis; developing specific targeted sector industry recruitment and retention strategies; research and recommending 21st century economic development metrics, and delivering a final report. IO.INC conducted a SWOT assessment with high levels of stakeholder engagement, involving all sectors of the public, private and civic communities. In addition to comprehensive research to identify the highest impact targeted sectors, IO.INC also prepared an in-depth comparative analysis of Buckeye vis-à-vis regional and national competitors, building a business case for why firms in specific sectors should locate, expand or startup in Buckeye. The final product was a comprehensive economic development strategy with an implementation plan, metrics and recommended budget. Since its completion, Buckeye has achieved demonstrable results in advancing and diversifying its local economy.

Reference for the City of Buckeye
 Mr. Len Becker, Economic Development Director
 P: (623) 349-6971
 E: lbecker@buckeyeaz.gov

B. Years These Services Performed: Since 2004

C. Resumes of Firm’s Principals: Provided in Section 4

IO.INC (Prime Contractor and Project Manager)

Dr. Ioanna Morfessis, Ph.D.
 President and Chief Strategist
 30 years experience
 Research; stakeholder engagement;
 strategy development; project management
 30 percent of her time

Mr. Russell Medley
 Senior Researcher
 16 years experience
 Research, strategy development
 20 percent of his time

Ms. Chrisanthe Morfessis, CSMA
 Senior Marketing and Project Director
 22 years experience
 Project management; strategy development
 25 percent of her time

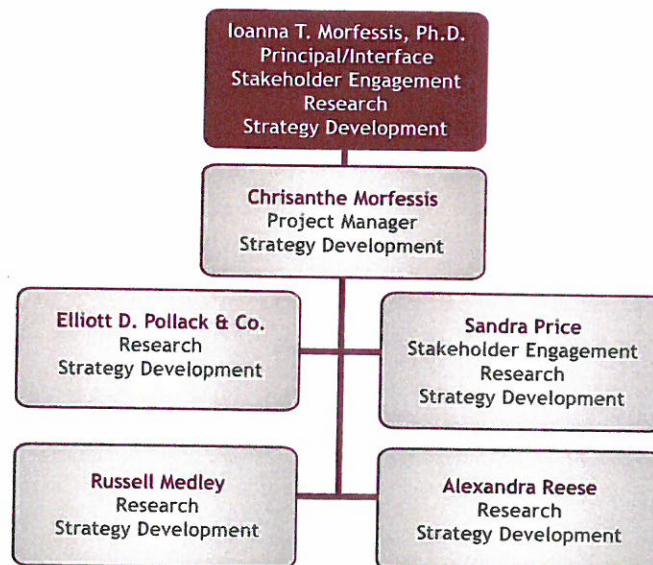
Dr. Sandra Price
 Stakeholder engagement, research
 and strategy development
 30 years experience
 25 percent of her time

Ms. Alexandra Reese
 Research and Strategy Development
 10 years experience
 20 percent of her time

Elliott D. Pollack & Co. (Subcontractor)
 Mr. Daniel Court, Senior Economist
 10 years experience
 Economic Research and Analysis
 20 percent of his time

D. Organization Chart:

IO.INC’S PROJECT TEAM FOR MARICOPA



SECTION 7. DETAIL RESPONSES TO THE EVALUATION CRITERIA

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A. Firm's Demonstrated Experience with Similar Projects

We are very proud of our demonstrated abilities and track record in working effectively with cities, counties, regions and states in developing economic development strategies that produce equally demonstrable, successful and sustainable results.

Our experience with the City of Maricopa is deep-rooted, dating back to 2004, eight months after the City's incorporation. As Maricopa's "first" economic development director (unofficial as an independent contractor) coming into the fast-growing community in August 2004, it was clear that an overarching economic development vision and strategy was essential to establish a platform upon which an economy could be built. At that time, Maricopa had the Basha's grocery store and a few other convenience retail and service firms. Working with the-then incumbent Mayor, City Council, City Manager, other department heads and the private sector, we were able to successfully make the case for the Walmart store. In that era, Walmart was not siting major stores in markets with less than 35,000 to 40,000 populations. Again, working with the City's elected officials and community leaders, we successfully landed Banner Health and Dignity Health, after scores of meetings and many years of hard work to convince these institutions that they needed to be in Maricopa. We also worked with Maricopa's neighboring Native American communities to request their participation in the City's economic development planning. As well, we worked with charter schools to introduce and attract them to Maricopa because the city was growing extremely rapidly and the public schools was challenged to provide the kind of quality K-12 education that new residents - many of whom were tech workers - expected from the communities in which they lived. We also called on pediatricians and internal medicine doctors to introduce them to Maricopa, asking them to open up offices in the city so that residents could have health care services in the city. We also trained and mentored the City's first official economic development director, as well as provided the research and leadership that led to the designation of the redevelopment district, the creation of the industrial development authority and the establishment of the Maricopa Economic Development Alliance.

For a city so young, Maricopa's economic development tool kit was on par with other regional cities that had been in existence for decades. Upon completing our work with Maricopa in 2009, the City was well-equipped to conduct economic development successfully; however, the outsized impact of the global recession and real-estate meltdown in Sunbelt cities significantly thwarted Maricopa's ability to progress in building its economy.

In late 2012, we were asked to reconnect with Maricopa's economic development by City officials to assist the Maricopa Economic Development Alliance (MEDA), the City's official private-public partnership for economic development. When this nonprofit organization was formed in 2009, its intent was to serve as a cornerstone of Maricopa's economic development toolkit. Every successful community in the nation has an effective private-public partnership for economic development. Since late 2012, IO.INC has been working with MEDA and by extension, the City of Maricopa, on a broad range of economic development endeavors. Our work with MEDA and Maricopa continues today.

No other firm or combination of firms will bring the depth of knowledge, history and genuine and passionate commitment that we bring to the critically important task of working with the

City of Maricopa to develop its next economic development strategy. The new strategy and implementation plan will build upon existing Maricopa strategies and plans, including Vision 2040, and will guide Maricopa's economic development for the next five years and beyond. The foundation of this new strategy will be to build upon Maricopa's existing, abundant economic, community and quality of life assets as well as the strong political determination and public will that presently exists for economic development.

As we have presented in Sections 4 and 6 of this proposal, IO.INC has extensive experience in economic development and economic development strategic planning. Only a few of many examples of strategic plans we helped to develop were provided in Section 6; we have worked in several other Arizona municipalities and regions as well.

Our hands-on experience and knowledge of economic development is not limited to the State of Arizona. Ioanna Morfessis, IO.INC's principal, has successfully launched and led several "best-of-class" local and regional economic development organizations, including the Greater Phoenix Economic Council. Our team brings an unmatched portfolio of successful experience in building city economies as well as the development of strategic plans that have yielded significant progress and results.

Just a few examples as the result of our work for some of the Arizona cities provided in Section 6:

City of Phoenix: Since the completion of IO.INC's work, the City of Phoenix has moved on several fronts in economic development, implementing many of our recommendations. Among key actions are:

- ◆ Significantly expanded its business appreciation, retention and expansion efforts.
- ◆ Entered into an agreement with Mayo Clinic and ASU to develop the Arizona Bioscience Corridor in North Phoenix.
- ◆ Led efforts to open a trade office in Mexico City, which was established in 2013. The Arizona Commerce Authority is a strong partner in this effort.
- ◆ Refined and launched an international Foreign Direct Investment (FDI) strategy.
- ◆ Re-instituted outreach and marketing missions, both with the Greater Phoenix Economic Council and independently.
- ◆ Implemented a California business recruitment strategy, both independently and in cooperation with the regional and state economic development organizations.
- ◆ Refined its emphasis on small business and entrepreneurship by significantly expanding the city's entrepreneurship ecosystem; more than three accelerators and four incubators have been launched with City of Phoenix support as a direct result of the economic development strategy, and entrepreneurship has exploded in Phoenix.
- ◆ Refined its workforce development emphasis on employer assistance, and opened up a one-stop shop for businesses to readily access qualified workers.

Town of Gilbert: Since the completion of IO.INC's work, the Town of Gilbert has moved successfully on several fronts in economic development, implementing many of our recommendations. Among key actions are:

- ◆ Significant refinement of Gilbert's 20 year economic development vision and five-year economic development strategy.

- ◆ Adoption of new metrics and indicators to help drive both the Town Government's economic and business development agenda, as well as the work of the Gilbert Department of Real Estate and Economic Development.
- ◆ Development and implementation of an economic development tool kit, including local incentives.
- ◆ Expanded investment in Gilbert's economic development programs and operations.
- ◆ Realignment and refinement of Gilbert's economic development functions into one expanded department.
- ◆ Alignment among the Mayor/Council with respect to primary economic development goals, metrics and overall strategy.
- ◆ Attained and exceeded all of its metrics, including quality jobs generated and private capital investment in Gilbert.

Town of Sahuarita: Since the completion of IO.INC's work, the Town of Sahuarita has moved successfully on several fronts in economic development, implementing many of our recommendations. Among key actions are:

- ◆ Development of a brand for Sahuarita that will help to unify different areas of the community into one identity, as well as to help the Town position and market itself for tourism and business attraction.
- ◆ Qualification for an Economic Development Adjustment grant to help fund the Town's first-ever business/office park that will be the location of emerging firms.
- ◆ Successful pursuit and award of a Rural Development Grant from the Arizona Commerce Authority to fund essential infrastructure needed to support the business/office park.
- ◆ Increased identity with State of Arizona officials and opinion-leaders.
- ◆ Participation in Southern Arizona economic development organizations and programs designed to increase entrepreneurship and international tourism, especially from Mexico.

Again, these are just a few of many real-world successful outcomes from the economic development strategic planning work IO.INC has performed in Arizona in recent years.

B. Plan and Methodology to Accomplish Project Requirements

There are three pillars to our work with the City of Maricopa:

- ◆ Project Setup and Public Input (Stakeholder Engagement)
- ◆ Market Assessment
- ◆ Project Outcomes and Deliverables

B.1 Project Setup and Public Input (Stakeholder Engagement)

As presented in the RFP, each of the tasks is inextricably linked with all others. The process described in our proposal provides for a highly integrated, coherent foundation upon which to develop the strategic framework for Maricopa's economic development strategy and implementation plan. Working in a highly collaborative manner as a member of Maricopa's Economic Development Team, we will utilize universally proven methods for discovery, research, analysis and strategy development. Each segment of our work and learnings will

be fully leveraged and integrated into the full body of our work. These building blocks will culminate in an Economic Development Strategy and Implementation Plan for the City of Maricopa.

B.1.1. Project Set-Up

We will begin our work with the City of Maricopa building upon a strategic assessment of the city's current status and outlook, based on the perspectives of members of the Maricopa Project Team and on local and regional economic data. The purpose of this recommended project "setup" approach is to establish a strong foundation for the entire project by conducting a strategic assessment of the economic and political environment in which the strategy development will take place, and to ensure that there is complete alignment between IO.INC and the vision and goals of the Maricopa Economic Development Strategy Project Team responsible for this endeavor. We will begin by having a comprehensive discussion session with the Maricopa Project Team and public elected and/or management officials (as appropriate). This will be a formal "kick-off" meeting to clarify and confirm team roles, time frames, information needs, deliverables, and to establish the management parameters and expectations for our work.

During this Project Setup phase, we will engage in a participative discussion of primary strategic issues to formulate goals and ensure a full understanding of the City's priorities and challenges. Areas of focus will include:

- ◆ Identification of the City of Maricopa's Project Team for the Economic Development Strategy - who will be the main point of contact/coordination.
- ◆ Discussion of general goals and objectives of the Economic Development Strategy, and the larger, longer term strategic initiatives it will support;
- ◆ Briefing by the Maricopa Project Team on its present and projected future outlook and plans for economic growth;
- ◆ Timelines and horizon for the development of the Economic Development Strategy;
- ◆ Briefing and overview by the Maricopa Project Team on the various strategies and reports previously prepared by the City, Greater Phoenix Economic Council, Arizona Commerce Authority and other organizations that support the community's vision and goals;
- ◆ Top overall economic development priorities;
- ◆ Delineation of the respective roles of development partners (state, regional and local economic development and business organizations);
- ◆ Identify primary Arizona competitors and preliminarily narrow the field of competitor/peer markets for analysis to five (5);
- ◆ Overview of existing business recruitment and retention/expansion activities;
- ◆ Historical and recent business recruitment and retention successes and "misses";
- ◆ Changes in location patterns of Maricopa-based firms, including those that downsized, closed operations or that may have left the community for another location;
- ◆ Relationships with the Greater Phoenix Economic Council, Arizona Commerce Authority and Arizona Office of Tourism.

Other data and information we will need to gather during the Project Setup includes:

- ◆ Provision of all local, regional and state reports and materials that are germane to this endeavor;
- ◆ Existing targeted industry sectors;
- ◆ Human capital availability; education and training and labor market conditions;
- ◆ Inventory of available land and vacant industrial, commercial and retail space;
- ◆ Reports, internal assessment and city data on condition and capacity of key infrastructure systems;
- ◆ Land use and zoning regulations and overview of permitting process;
- ◆ Available investment incentives for the City;
- ◆ Business attraction protocol and practices;
- ◆ Business retention protocol and practices;
- ◆ Internal tool kit, which includes in-house research, data and capacity of the City to respond to prospect requests;
- ◆ Resource availability; and,
- ◆ Other issues germane to the strategy, as appropriate.

Deliverable for the Project Set-Up Stage:

Executive Summary Internal Memorandum: Following our Project Set-Up session, we will prepare and submit a memorandum that summarizes our discussions, and the City's goals, challenges and opportunities to be addressed in the remaining development of the tasks described in the Scope of Work. In addition, we will submit a refined Work Task outline and a more detailed time line (if appropriate). This memo will be submitted within one week of the conclusion of our Project Setup session.

Key Personnel for Project Set-Up Session: Ioanna Morfessis

- ◆ **Comprehensive Review:** In addition to the comprehensive information garnered through the Project Set-Up, to maximize the investments of the City and its partners in previous research and studies, we will build on the body of work that has been developed in recent years. A comprehensive review of existing studies and reports will take place very early in our work with the City of Maricopa. We anticipate reviewing the City's Vision 2040 plan; the Maricopa General Plan (current and updates); current proposed development projects and those that are underway; the existing Maricopa economic development strategic plan; similar plans at the regional level (Greater Phoenix and Pinal County); Maricopa Association of Governments studies germane to Maricopa; Arizona Department of Transportation plans including plans for the construction of the SR 347 overpass, and other reports germane to the economic development of the City of Maricopa.

Key Personnel for Comprehensive Review: Ioanna Morfessis and Members of the IO.INC Team

B.1.2 Public Input/Stakeholder Engagement - SWOT Assessment

Stakeholder engagement will be a cornerstone of IO.INC's work with the City of Maricopa. No community can realize its potential and attain sustained success in economic and community development without the active engagement and participation of a broad range of business, government, educational and civic stakeholders who share common values and vested interests in the well-being of the people and businesses who reside there.

Working with the Maricopa Project Team, IO.INC will identify key stakeholders who should be included in the development of Maricopa's Economic Development Strategy. IO.INC is renowned for its ability and track record in bringing diverse interests and groups together to focus on a common goal. Utilizing the skills and abilities of its principal, as well as methods borrowed from McKinsey's 7S, appreciative inquiry, balanced scorecard and other strategic planning methods, IO.INC will work energetically with the City of Maricopa and its stakeholders to create excitement and alignment for the City's economic development strategy.

IO.INC will engage in personal, one-on-one confidential interviews with the elected leadership of the City of Maricopa, the City Manager and key department heads and other public officials, and primary economic development stakeholders to conduct and complete a custom Strengths, Weaknesses, Opportunities and Threats (SWOT) assessment. These interviews are critical to assessing Maricopa's current economic development position, as well as to understanding and defining the potential opportunities that will help shape the strategic framework. These SWOT interviews will include individual meetings with:

- ◆ Mayor Christian Price and members of the Maricopa City Council; the City Manager; the director and staff of the Maricopa Economic Development Department; other department heads whose work directly impacts the City's economic development competitiveness and performance, and other public officials (as appropriate) to obtain their views on the City's economic development status and capacity (up to 15 one-on-one interviews).
- ◆ Key economic development partners and stakeholders, including the Greater Phoenix Economic Council; Arizona Commerce Authority; Arizona Office of Tourism; Arizona Department of Transportation; Maricopa Center for Entrepreneurship, Central Arizona College; Maricopa Chamber of Commerce; Maricopa Association of Governments; the Ak-Chin Indian Community; the Gila River Indian Community; members of the Maricopa Economic Development Alliance Board of Directors; members of the Maricopa Unified School District Governing Board, and other key external stakeholders, including arts/cultural organizations; a youth organization; and other organizations whose work and spheres of influence directly impact Maricopa's quality of life and economic competitiveness (up to 30 one-on-one interviews for this segment of stakeholder interviews).
- ◆ Leading commercial-industrial brokers, developers and property owners who are a part of the City's economic development prospect deal generating pipeline or who have a significant presence and/or investment in the City of Maricopa (up to 10 interviews).

Assistance/Support Needed from the Maricopa Project Team for SWOT Analysis:

- ◆ All coordination and scheduling of all meetings with public, private and civic stakeholders as described in Task B.1.2 above.

- ◆ Advance electronic distribution of all meeting materials to stakeholders.
- ◆ Provision of contact information of each individual stakeholder.
- ◆ NOTE to Project Team: we respectfully request that these meetings be scheduled in a convenient, “neutral” location to maximize our time on the ground, and that all of these meetings be scheduled back-to-back over consecutive days.

Deliverables for SWOT Interviews:

- ◆ Custom SWOT preparation exercises
- ◆ Custom SWOT analysis
- ◆ Identification of key SWOTs, including those business location attributes that may be either assets for or inhibitors to the retention, expansion and attraction of high-value-added enterprises and firms.
- ◆ Executive Brief (written report) of the City of Maricopa SWOT Analysis.
- ◆ Discussion session with the Maricopa Project Team regarding key findings and recommended next steps.

Key Personnel for this Task: Ioanna Morfessis and Members of the IO.INC Team

IMPORTANT NOTICE TO THE MARICOPA PROJECT TEAM:

IO.INC has worked with dozens of cities and regions in assessing current local conditions and in developing economic development strategies, marketing platforms and implementation plans. One of the most critical building blocks in conducting these assessments and preparing these strategies is trust. It is the policy of IO.INC to maintain the utmost of confidentiality in its meetings with stakeholders, and accordingly, we will honor the confidentiality commitment that we make to the City of Maricopa’s stakeholders. IO.INC will not disclose publicly a list of the names of the individuals who are interviewed in this process, nor will we disclose or attribute any comments/contents of discussions to any individual. IO.INC will aggregate results and provide them in a written report, transmitted in person, to the appropriate members of the Maricopa Project Team. Our best counsel is to maintain these reports in confidence.

B.1.3 Stakeholder Engagement/Collaborative Roundtable-Focus Groups

The second major stage of work is to prepare for, convene and facilitate three collaborative stakeholder roundtables/focus groups of up to 25 government, business, civic and educational leaders each - including members of the Maricopa Advocates Program - to obtain their input into the Maricopa Economic Development Strategy. These roundtables/focus groups will provide significant opportunity for the City’s key stakeholders to personally provide their perspectives, input and aspirations into the overall process. We request that each of these three sessions be scheduled for 120 minutes each, and that we conduct them within a one-day time frame. IO.INC will provide the custom SWOT materials in advance of these stakeholder roundtables/focus groups so that all stakeholders are prepared and ready to participate. In addition, IO.INC will prepare the recommended agenda/format for these roundtables, subject to approval by the Maricopa Project Team, and will facilitate the meetings.

Assistance/Support Needed from the Maricopa Project Team for Stakeholder Collaborative Roundtables:

- ◆ All coordination, scheduling, invitations, logistics and costs associated with the roundtables/focus groups described in Task B.1.3 above, and in the provision of all administrative support required in the preparation and follow up phases.
- ◆ Provision of the lists of participants at least seven days in advance of these roundtables.
- ◆ NOTE to Project Team: we respectfully request that these roundtables be scheduled over two consecutive days, one each in the morning and one in the afternoon, in a facility where a U-shaped table can be configured.

Deliverables for Roundtables/Focus Groups:

- ◆ Highly effective forums for stakeholder engagement and input.
- ◆ Integration of major findings and recommendations for action into the overall SWOT Executive Brief report.
- ◆ Discussion session with the Maricopa Project Team regarding recommended next steps.

Key Personnel for this Task: Dr. Ioanna Morfessis and Members of the IO.INC Team

B.2 Market Assessment

The Market Assessment is a critical building block for the City of Maricopa Economic Development Strategy and Action Agenda (Implementation Plan). Accordingly, we will conduct a multi-faceted, quantitative and qualitative assessment of (1) existing economic conditions; (2) business locations trends that drive where and why firms locate and create jobs; (3) a survey/inventory of Maricopa's business and quality of life assets (asset map); (4) an assessment of future impact of planned development projects, and (5) a targeted economic sectors and business case analysis. All of this data, research and analysis will comprise the foundation for the development of the City's economic development strategy.

B.2.1 Economic Conditions Snapshot

The first step in assessing the local economy is to prepare an analysis of current economic conditions and trends. This data will provide a quantitative evaluation of how Maricopa is performing within the region, and relative to its competitors. We will include the data for the City of Maricopa, Maricopa County, Pinal County and up to three other peer cities in the Maricopa-Pinal County metroplex. All data will be normalized to account for size differences and make the factors comparative across regions.

Maricopa and its competitors have many characteristics and assets, only some of which are likely to be important to a given group of potential locates. The key is to understand what Maricopa offers that is more valuable to new and relocating businesses than its competitor's attributes. We have identified seven major categories of business climate attributes that impact business investment decisions.

- ◆ **Demographics** - current and projected population, current population by age and race/ethnicity, median age, average household size, school enrollment, median household income and per capita income
- ◆ **Workforce** - educational attainment for the adult population overall and by age cohort, occupational skills, industry mix, labor force participation, unemployment, occupational wage levels, access to higher education, county to county commuting patterns, projected job growth, share of jobs by worker age, share of jobs by wage level, share of jobs by worker educational attainment
- ◆ **Real Estate** - availability and cost of office and industrial space, lease rates, construction costs, construction activity levels
- ◆ **Market Access** - interstate and rail access, air access in terms of direct flight availability and destinations
- ◆ **Taxes and Financial Trends** - state and local tax rates, assessed value growth, retail sales trends and sales per capita
- ◆ **Quality of Life** - crime rates, cost of living, housing prices, secondary education quality, average commute times for residents
- ◆ **Economic Development Program** - comparative analysis of structure, budgets and other distinguishing characteristics of the primary economic development agency/organization in competitor markets

Based on this data, we will assess the competitive advantages and disadvantages of Maricopa as a place to do business, and determine what the city's standing is among the competitor market areas.

Additionally, we will look at the area's current economic base by looking at patterns of industry growth at the six-digit NAICS level in Maricopa and Pinal counties to identify industry specializations and key growth sectors. We typically look at employment by industry for the past five years to identify trends over time. We will also look at projected employment and output growth by industry on a state and national basis to help understand what Maricopa's future economic composition may look like.

In addition to examining the economic base of the counties, we will prepare a local business segmentation analysis to show the types of businesses that are currently present in the City of Maricopa. This will include the number of firms as well as the distribution of firms by employment size and by industry. This data, in combination with the competitive market assessment will help us to understand the area's economy and business climate, and set the stage for the target industry analysis.

Deliverables for Economic Conditions Snapshot:

- ◆ A written report detailing how Maricopa compares on each business climate factor as well as a summary matrix identifying the city's overall strengths and weaknesses relative to the competitor markets.
- ◆ Analysis of economic base and market segmentation for City of Maricopa, Maricopa and Pinal counties including existing industry specializations and key growth sectors.

Key Personnel for this Task: Danny Court and Elliott D. Pollack & Co.

B.2.2 Business Location Trends Analysis

Another foundational building-block for the Maricopa Economic Development Strategy is the identification of the primary drivers of where and why businesses are locating new facilities and creating jobs. These drivers determine job creation, private capital investment, innovation, and high-value-added economic activity. IO.INC has acquired significant knowledge through its engagements with a broad range of companies across all sectors of the national and global economies. Using IO.INC's knowledge base as well as interviews with other site selection consultants, leading executives and commercial/industrial brokers, and published authoritative reports, we will identify major trends that drive business locations in the U.S. and across the world. This information will be presented in a PPT format, with IO.INC's brand, and will serve as an important educational tool for the City of Maricopa's elected officials; management officials; the Maricopa Economic Development Department and its primary partners and economic development/business stakeholders. For any local trends that may need to be addressed in this analysis, IO.INC will depend upon staff-supported research from the Maricopa Project Team.

Deliverable for Business Location Trends Analysis:

A PPT presentation that summarizes the major highlights of this research. This will provide important and foundation-building information and insights to help inform the targeted sectors analysis and the implementation plan. IO.INC reserves all rights to this work.

Key Personnel for this Task: Ioanna Morfessis and the IO.INC Research Team

B.2.3 Survey/Inventory Maricopa Assets

Through all phases of our work with Maricopa, including those in the preceding paragraphs, we will pinpoint Maricopa's economic, community and quality of life assets those asset. The distinctive assets of Maricopa - of which there are an abundance - will serve as the foundational underlayment for the economic development strategy. Regional assets also will be taken into account, and will be presented as part of the portfolio of assets upon which the City of Maricopa can continue to build and strengthen its economy. The goal of this work is to thoroughly identify, vet and articulate Maricopa's distinctive value proposition - helping to differentiate the City from all others.

Deliverable for Analysis of Maricopa's Current Economic Development Assets:

An administrative memorandum detailing the findings of this analysis as well as recommendations for action. This will help to inform the Economic Development Strategy and Implementation Plan.

Key Personnel for this Task: Ioanna Morfessis and the IO.INC Research Team

B.2.4 Assess Future Impact of Current Development Projects

Presently, the City of Maricopa has several strategic employment and commercial projects planned or underway. They include the Estrella Gin Business Park; Copper Sky Commercial Center and the recently-approved SR 347 Overpass.

As part of our Market Assessment, we will meet with the Director of Economic Development and Maricopa Project Team, and other City and private/public representatives (as appropriate), to discuss their plans and determine how these projects will impact Maricopa's economic development. Our findings and recommendations will be incorporated into the Economic Development Strategy and Action Agenda (implementation plan).

Deliverable for the Assessment of Future Impact of Current Development Projects:

A summary of recommendations for how the City of Maricopa can maximize these opportunities to their highest and best impact for startups, business retention/expansion and business recruitment.

Key Personnel for this Task: Ioanna Morfessis and Danny Court

B.2.5 Targeted Economic Sectors and Business Case Analysis

Using the work garnered through stakeholder engagement, the SWOT analysis, the Economic Conditions Snapshot/Market Assessment, and the Business Locations Trends Analysis, combined with our knowledge of global and national trends across a broad range of industry sectors, we will identify and assess existing and emerging high impact targeted economic sectors. Our objective is to identify those sectors and industries (up to four) that can capitalize on the specific business location attributes and competitive strengths of the City of Maricopa; the emphasis and focus is on the "best and highest impact" for Maricopa, period. The sectors identified will have a high propensity to avail themselves of the City's relative competitive strengths and less likely to be influenced by the overall region's relative competitive disadvantages, and will yield the highest impact to realize Maricopa's vision for prosperity. We will conduct this analysis to inform the Maricopa Project Team of strategic sector opportunities that could generate the types of business, industry, tourism and entrepreneurial growth, capital investment and job generation.

The fundamental principle that will guide our work in the Targeted Economic Sectors Analysis is the commitment to first build upon Maricopa's existing assets and use these assets as the key determinants in identifying those sectors that will have the highest and best impact on the long-term economic vitality of the City. Working with the Maricopa Project Team, we will identify, prioritize and recommend the top economic sectors that should be selected for analysis. We will include not only those high impact sectors which are extant in the City of Maricopa, but also identify emerging sectors that merit inclusion and further analysis.

As part of our research and analysis, we will draw upon Maricopa, Maricopa Association of Governments, Central Arizona Association of Governments and the State of Arizona's recent studies and analyses to confirm important local, regional and state trends as they relate to the targeted sectors that are identified for analysis. Again, our emphasis will be on how best to position Maricopa to attract/retain and grow high quality jobs in those four primary targeted sectors having the highest propensity to locate in the community.

In terms of market intelligence, we will provide a working definition of each targeted economic sector including a detailed description of the types of products and services, and a listing of the top ten metro areas where each target sector is currently concentrated with data on employment and number of establishments. We will prepare a pro-forma to illustrate what a typical company in each target sector would look like in terms of employment size,

average wages, capital investment and square footage requirements. We also will identify the detailed occupational needs of the selected targeted sectors and the availability of qualified workers in Maricopa and Pinal counties that will be needed to support the growth of these sectors.

Deliverables for Target Industry and Business Case Analysis:

The deliverables for this portion of our work will be extremely proprietary, comprised of a written report summarizing the entirety of the Targeted Industry and Business Case Analysis. A total of up to four targeted sectors will be analyzed. In a separate confidential and proprietary administrative memorandum, we will provide specific Maricopa-centric strategies for the attraction, retention and growth of firms in each of the targeted sectors.

Key Personnel for this Task: Danny Court and Elliott D. Pollack & Co.

B.3 Project Outcomes

Working with full, hands-on participation from the City of Maricopa Economic Development Department, working side-by-side as a team member, the IO Team will develop a recommended ambitious yet attainable framework and action agenda that will guide Maricopa toward successful results and its best possible economic future. The Economic Development Strategic Framework and Action Agenda (implementation plan) will integrate all major findings from the prior phases of work conducted as outlined in this recommended scope of work, and will:

- ◆ Align the economic development strategy to the precepts and principles of the Maricopa City Council's Vision 2040 Strategic Plan.
- ◆ Coordinate with the City's General Plan update to ensure alignment between the economic development portion of that plan with the new economic development strategy.
- ◆ Ensure that the strategy builds upon the body of knowledge that has been developed over time.
- ◆ Summarize all major findings of the research to ensure that the policy-makers and stakeholders fully understand that the strategy is data-driven.
- ◆ Articulate the guiding principles for the City of Maricopa's economic development strategy.
- ◆ Articulate Maricopa's economic and community strengths, assets and advantages.
- ◆ Make the case for the highest and best impact opportunities to diversify and strengthen the City's economic base over the mid to long-term.
- ◆ Identify the top targeted economic sector opportunities and priorities.
- ◆ Articulate the major opportunities and challenges that were identified through both stakeholder engagement and research.
- ◆ Deliver a clear implementation plan, including specific goals, objectives, tactic, timelines and deliverables for:
 - » Building internal capacity, e.g., focusing on closing gaps, ameliorating major obstacles for progress and success, championing existing initiatives including redevelopment plans, etc.
 - » Developing and leveraging available but underutilized resources

- » Recommending improvements to Maricopa’s economic development program framework, processes and policies
- » Strengthening Maricopa’s economy - business retention, recruitment and entrepreneurship
- » Building, expanding and enhancing partnerships to leverage and position Maricopa more competitively
- » Identifying a 21st century competitive tool-kit, including incentives and other programs at the local level.
- » Identifying how the City can leverage opportunities between home grown and local businesses and larger firms, including future growth opportunities arising from the recommended targeted economic sectors.
- » Identifying how the City and other partners - public, educational, civic and business - can/should increase and leverage collaboration to achieve economic development success over the long-term.
- » Recommending positioning and marketing strategies to effectively reach decision-makers and influencers in the site location process and ensuring that they are in alignment with the substantial investment that already has been made by the City and the Maricopa Economic Development Alliance.
- ◆ Summarize the foundation for the strategy and include resource requirements for successful development, launch and sustained implementation.
- ◆ Provide indicators and metrics to measure Maricopa’s progress.
- ◆ Identify major changes required in City codes and ordinances to ensure the implementation and success of the strategy.
- ◆ Identify resources and tools that will be needed within the City Government, including human and financial capital, to successfully implement the strategy and realize results.

Key Personnel for this Task: All members of the IO.INC team

B.4 Deliverables

- ◆ A completed, proprietary, original, evidence-based economic development strategy and actionable, realistic and attainable implementation plan for the City of Maricopa. The strategy will include a detailed implementation strategy with a recommended timeline and target date by major goal and objective.
- ◆ A professionally designed and produced written Executive Summary report that summarizes all major findings of the body of work described herein (5 copies). This first version will be considered “draft” pending the Maricopa Project Team’s review. We ask that the members of the Maricopa Project Team turnaround their review in 10 days.
- ◆ Alignment and support for the Economic Development Strategy and identification of what the City will need will need from a capacity and budgetary standpoint to actualize the goals and objectives of the strategy.
- ◆ Recommended metrics for assessing progress.
- ◆ A final report once the Maricopa Project Team’s feedback has been received. Please note that we will provide 20 printed copies of the final report, along with printer spreads of this final report. Printing of additional copies is excluded from this budget.

- ◆ A PPT summarizing the overall Economic Development Strategy for use in public presentations.
- ◆ Two public presentations by the IO.INC Team, which will include a summary of the methodology employed to develop the strategy.

C. Ability to Demonstrate Understanding of Economic Development Strategic Planning

As we have shared in this proposal, IO.INC has been blessed to work with many communities in helping them to achieve economic development success. This success in large measure can be tied to the communities' economic development strategic plans. If a community has a clearly articulated vision for its future that is accompanied with an equally clear, rational and evidence-based road map (strategy), its chances for success are greatly enhanced.

In addition to the experience and qualifications we have presented in preceding sections of this proposal, the City of Maricopa also will benefit from the IO.INC Business BrainTrust. In addition to the primary team members, the communities we are privileged to work with benefit from IO.INC's Business BrainTrust, comprised of C-suite executives representing a broad range of business sectors and areas of expertise: consumer products; retail; hospitality; health care; higher education; information technology and communications; entrepreneurship; biotech; clean tech; advanced and standard manufacturing; consumer trends; logistics and distribution; nonprofits. Almost all of the members of IO.INC's BrainTrust currently hold top corporate executive positions in businesses within these industries; a few are recently retired. It is IO.INC'S customary business practice to have members of the BrainTrust review the firm's research and findings, ensuring that our recommendations are sound and will make a difference for our clients. Once we complete the SWOT process, our BrainTrust reviews the aggregate findings and offers their perspectives and ideas that are foundational to framing our recommendations, contributing to the overall economic development strategy for Maricopa.

D. Fee Schedule

The budget for Maricopa's economic development strategic plan is \$65,000.00, which represents a 30+ percent reduction in what IO.INC would typically assess for work of this scope. It is our intent to reflect our sincere commitment to the City of Maricopa, not just for today, but also to acknowledge the historic and treasured relationship we have enjoyed with the City for the past 12 years.

This budget includes all production, design and printing costs as noted within the proposal for various reports and the final Economic Development Strategy and Action Agenda "brochure" type report (up to 20 copies of the final report plus printer spreads for any additional copies).

The work will be performed on a fixed-fee, all inclusive basis, and is budgeted as follows:

B.1 Project Setup and Public Input (Stakeholder Engagement)

B.1.1 Project Set-Up	No charge
B.1.2 Public Input/Stakeholder Engagement - SWOT Assessment	\$10,000.00
B.1.3 Stakeholder Engagement/Collaborative Roundtable-Focus Groups	\$ 7,500.00

B.2 Market Assessment

B.2.1 Economic Conditions Snapshot - Market Assessment	\$ 7,500.00
B.2.2 Business Location Trends Analysis	\$ 5,000.00
B.2.3 Survey/Inventory Maricopa Assets	No charge
B.2.4 Assess Future Impact of Current Development Projects	\$ 2,500.00
B.2.5 Targeted Economic Sectors and Business Case Analysis	\$25,000.00

B.3 Outcomes - Final Economic Development Strategy and Implementation Plan **\$ 7,500.00**

TOTAL **\$65,000.00**

E. Efficient and Detailed Timeline

IO.INC is prepared to formally begin its work with the City of Maricopa at whatever date best suits the community and will commit its time and resources to complete these services no later than May 31, 2017 (if not before). Below is a recommended timeline for our work on Maricopa’s economic development strategy and implementation plan.



E. Efficient and Detailed Timeline

We have developed a recommended work schedule that enables us to build on the learning as we go and to assure that all of the key questions and challenges are addressed early enough in the process to provide time for additional analysis as well as thoughtful reflection. Our timeline is highly ambitious to reflect the requirements of the RFP, and we propose to start, perform and complete our work within an 8 month time frame.

Many of our work items will be conducted in parallel with one another - an advantage of having a team of seasoned professionals and experts all of whom are accustomed to working

together on similar projects. We will work in a highly integrative manner side-by-side as a member of the Maricopa Project Team.

Please note that this proposed schedule is predicated on starting on August 15, assuming that the City of Maricopa will have completed its approval processes, including any formal approvals, purchasing and contracting requirements. The schedule will be adjusted depending on when a final agreement will be formalized to reflect any additional time beyond the third week of August 2016. This schedule also is dependent upon the good offices of the Maricopa Project Team providing the reports, studies, databases and other information essential to this entire enterprise, as well as administrative and logistical support to convene and coordinate all stakeholder and public meetings.

Major Milestones/Target Dates

(PLEASE NOTE - these dates will be reconfirmed during our project setup worksession)

Project Setup and Stakeholder Engagement:

(note - this includes the SWOT Assessment)

- ◆ Project Setup Worksession:
- ◆ Stakeholder Engagement - One-on-One Interviews:
- ◆ Stakeholder Interviews - Collaborative Stakeholder Roundtables:
- ◆ Comprehensive Review:

August 15 - October 31

August 15 - August 22

September 12 - November 4

October 10 - November 4

August 15 - September 12

Market Assessment:

- ◆ Economic Conditions Snapshot:
- ◆ Business Locations Trends Analysis:
- ◆ Survey/Inventory Maricopa Assets:
- ◆ Assess Future Impact of Current Development Projects:
- ◆ Targeted Economic Sectors and Business Case Analysis:

October 14 - March 13

October 14 - November 30

October 14 - November 30

October 14 - December 16

October 14 - December 16

January 16 - March 17

Outcomes and Deliverables:

- ◆ Draft Economic Development Strategy and Implementation Plan:
- ◆ City Review
- ◆ Finalize Economic Development Strategy:
- ◆ Presentation to Maricopa City Council:
- ◆ Additional Public Presentation:

March 20 - May 22

March 20 - April 10

April 17 - May 1

May 2 - May 12

May 17

May 24

August 2016:

- ◆ Project Setup/Kickoff Meeting
- ◆ Comprehensive Review
- ◆ Prepare for Stakeholder One-on-One Interviews
- ◆ Prepare for Stakeholder Collaborative Roundtables

September 2016

- ◆ Initiate Stakeholder Engagement
- ◆ Initiate Individual SWOT Interviews
- ◆ Initiate and Convene Stakeholder Roundtables

October 2016

- ◆ Continue Stakeholder Engagement
- ◆ Continue Individual SWOT Interviews
- ◆ Continue Market Assessment
- ◆ Initiate Market Assessment
 - » Economic Conditions Snapshot
 - » Business Locations Trends Analysis
 - » Survey/Inventory of Maricopa Assets

November 2016

- ◆ Continue Stakeholder Engagement
- ◆ Prepare and Submit Executive Brief on the SWOT Assessment
- ◆ One-on-one meetings with Maricopa Project Team, Mayor and Councilmembers
- ◆ Complete Economic Conditions Snapshot
- ◆ Complete Business Locations Trend Analysis
- ◆ Continue Market Assessment
 - » Survey/Inventory of Maricopa Assets
 - » Assess Future Impact of Planned Development Projects

December 2016

- ◆ Continue Stakeholder Engagement
- ◆ Develop and Submit Executive Brief PPT on the SWOT Analysis
- ◆ Complete Survey/Inventory of Maricopa Assets
- ◆ Complete Assessment of Future Impact of Planned Development Projects

January 2017

- ◆ Continue Stakeholder Engagement
- ◆ Continue Market Assessment
 - » Initiate Targeted Economic Sectors and Business Case Analysis

February 2017

- ◆ Continue Stakeholder Engagement
- ◆ Continue Market Assessment
 - » Targeted Economic Sector and Business Case Analysis
- ◆ Initiate Metrics Research/Recommendations

March 2017

- ◆ Continue Stakeholder Engagement
- ◆ Complete Targeted Economic Sector and Business Case Analysis
- ◆ Initiate Development of Economic Development Strategy and Implementation Plan
- ◆ Complete Research/Recommended Metrics

April 2017

- ◆ Continue Stakeholder Engagement
- ◆ Continue Development of Economic Development Strategy and Implementation Plan
- ◆ Prepare First Draft for Maricopa Project Team Review

May 2017

- ◆ Submit First Draft to Maricopa Project Team for Review
- ◆ Finalize Economic Development Strategy and Implementation Plan
- ◆ Design and Produce Printer-ready Spreads for Final Report
- ◆ Prepare PPT Executive Summary for Public Presentations
- ◆ Design and Produce Printer-ready Spreads for Final Report
- ◆ Formal Presentation to Mayor/Council
- ◆ One Additional Public Presentation

SECTION 8: REFERENCES

SECTION 8: REFERENCES

Reference for Arizona Commerce Authority

Mr. Keith Watkins, Senior Vice President, Economic/Rural Development
333 North Central Avenue, Suite 1900
Phoenix, AZ 85004
P: (602) 845-1278
E: KeithW@azcommerce.com

Reference for City of Phoenix

Ms. Diane Nakagawa, Deputy Director
Department of Community and Economic Development
200 W. Washington Street, 20th Floor
Phoenix, AZ 85003
P: (602) 261-8013
E: diane.nakagawa@phoenix.gov

Reference for Town of Sahuarita

Mr. Victor Gonzalez, Economic Development Manager
375 W. Sahuarita Center Way
Sahuarita, AZ 85629
P: (520) 822-8800
E: vgonzalez@sahuaritaaz.gov

Reference for City of Scottsdale

Ms. Danielle Casey, Director of Economic Development
3839 North Drinkwater Blvd., 2nd Floor
Scottsdale, AZ 85251
P: (480) 312-7601
E: DCasey@ScottsdaleAZ.gov

Reference for the Town of Gilbert:

Mr. Dan Henderson, Director, Department of Real Estate & Economic Development
90 East Civic Center Drive
Gilbert, AZ 85296
P: (480) 503-6891
E: dan.henderson@gilbertaz.gov

Reference for the City of Buckeye

Mr. Len Becker, Economic Development Director
530 E. Monroe Avenue
Buckeye, AZ 85326
P: (623) 349-6971
E: lbecker@buckeyeaz.gov

SECTION 9: DISCLOSURES OF CONFLICT OF INTEREST

SECTION 9: DISCLOSURES OF CONFLICT OF INTEREST

Since 2013, IO.INC has been working as an independent contractor with the Maricopa Economic Development Alliance, an independent nonprofit 501(c)3 charitable organization that serves as Maricopa's private-public partnership for economic development (www.MaricopaEDA.com).

Incorporated in 2009, the Maricopa Economic Development Alliance (MEDA) works to:

Mission Statement:

MEDA champions strategies and solutions that foster economic growth and prosperity in the City of Maricopa.

Value Proposition:

As Maricopa's private-public partnership for economic development, MEDA achieves its mission by bringing together the business, government, education and the civic communities to identify and advance forward-looking policies, strategies and solutions necessary to facilitate investment, growth and workforce development.

Since its inception in 2009, MEDA has had a performance-based contract with the City of Maricopa to provide economic development services, and more recently, to also market and promote the City to present and future residents and businesses. Through private sector and foundation contributions, MEDA matches its public service award portion of its contract 50-50 (dollar for dollar). Likewise, for the marketing portion of its contract with the City of Maricopa, MEDA provides 25 percent of the funding for marketing and promotion activities - all in accordance with a strategy and implementation plan - and the City of Maricopa provides 75 percent for this function.

Maricopa's mayor, vice mayor, city manager and economic development director are ex-officio members of the MEDA board of directors.

IO.INC provides professional services, including organizational management and development, economic development support and assistance and private sector fund raising, as well as the management of the marketing contract between MEDA and its independent marketing contractor.

According to the Arizona Revised Statutes, Title 38, Chapter 3, Article 8, if awarded this work, IO.INC will request that its contract with the City of Maricopa for services would contain language that acknowledges IO.INC'S role in MEDA, which may be regarded as a substantial interest under the foregoing statute, and confirms that IO.INC will not participate in any actions involving MEDA and the City of Maricopa on any matter that may affect the either the City's or MEDA's contract with IO.INC unless pre-approved by the City of Maricopa.

SECTION 10: SUBSTITUTE W-9 FORM



39700 W. Civic Center Plaza
Maricopa, AZ 85138
Ph: 520.568.9098
Ex: 520.568.9120
www.maricopa-az.gov

**SUBSTITUTE W-9 FORM
ATTACHMENT C**

PART I: Company Information:

1. Name (as shown on Income Tax Return): Worldwide Growth Enterprises, Inc.
2. Business Name (if different than above): IO.INC
3. DUNS #: N/A
4. Federal employer identification number (or SSN): 20-0860964
5. Type of organization (check one):

<input type="checkbox"/> Individual/Sole Proprietor	<input type="checkbox"/> Limited Liability Company*
<input checked="" type="checkbox"/> Corporation	*Choose the tax classification
<input type="checkbox"/> Partnership	<input type="checkbox"/> Disregarded Entity
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Corporation
	<input type="checkbox"/> Partnership
6. Order Address: 3014 E. Camelback Rd., Ste. 1000, Phoenix, AZ 85016
 (Order address) (City) (State) (Zip code)
7. Remittance address (if different than above): _____
 (Remittance address) (City) (State) (Zip code)
8. Contact person for bid invitations: Ioanna Morfessis
9. Phone Number: 602-626-8560 Fax Number: 602-626-8562
10. Email address of contact person: ioanna@ioworldwide.com
11. Applicant is a (check one):

<input type="checkbox"/> Factory Representative	<input type="checkbox"/> Jobber
<input type="checkbox"/> Manufacturer	<input type="checkbox"/> Authorized distributor
<input type="checkbox"/> Retail dealer	<input type="checkbox"/> Contractor
<input checked="" type="checkbox"/> Consultant	<input type="checkbox"/> Other: _____
12. Indicate if the business is registered as a minority or woman-owned company.

<input type="checkbox"/> Minority-owned	<input type="checkbox"/> Woman-owned	<input type="checkbox"/> Not Applicable
---	--------------------------------------	---
13. How long has the company been in business? 2004
14. Does applicant currently hold a valid business license issued by the City of Maricopa?

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
---	-----------------------------

PART II: COMMODITY OR SERVICE DESCRIPTION

1. Commodity/Service description (this section must be completed): **Economic Development Consulting Services**

PART III: APPLICANT TERMS AND CERTIFICATION

Terms:

The City of Maricopa may take up to thirty (30) calendar days after the receipt of vendor's invoice to render payment unless other arrangements are made through a written contract. Applicant's signature below signifies acceptance of those terms.

Under Penalties of perjury, I certify that:

1. The number shown on this form is my correct federal employer identification number.
2. I am not subject to backup withholding because of failure to report interest and dividend income.
3. I am a U.S. person (including a U.S. resident alien).
(NOTE: You must cross out item 2. above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return).

4. The following business ownership classifications are applicable:

Disadvantaged Business Enterprise Ownership Classification (Select One Only):

- | | |
|--|--|
| <input type="checkbox"/> 1 Non-Small/Non-Minority/Non-Disabled | <input type="checkbox"/> 8 Small Business/Disabled Owner |
| <input checked="" type="checkbox"/> 2 Small Business (Per ARS §41-1001(20)) | <input type="checkbox"/> 9 Minority Woman Owned Business |
| <input type="checkbox"/> 3 Minority Owned Business [Per 15 CFR §1400.1(a)] | <input type="checkbox"/> 10 Disabled-Minority Owned Business |
| <input checked="" type="checkbox"/> 4 Woman Owned Business | <input type="checkbox"/> 11 Disabled-Woman Owned Business |
| <input type="checkbox"/> 5 Owned By Disabled Individual (Per ARS §41-1492.5) | <input type="checkbox"/> 12 Small Business/Minority-Woman Owned |
| <input type="checkbox"/> 6 Small Business/Minority Owned | <input type="checkbox"/> 13 Small Business/Disabled-Minority Owned |
| <input checked="" type="checkbox"/> 7 Small Business/Woman Owned | <input type="checkbox"/> 14 Small Business/Disabled-Minority-Woman Owned |

"The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding."

Ioanna T. Morfessis
 Name (Please print) **Ioanna T. Morfessis** Signature

 Title (Please print) **President** Date

INTERNAL USE ONLY	
CC# _____	AUTHORIZATION: _____
FAX: _____	EMAIL: _____ PRINT: _____
REQUESTED BY: _____	

SECTION 11: COST SUMMARY/FEE SCHEDULE



39700 W. Civic Center Plaza
 Maricopa, AZ 85138
 Ph: 520.568.9098
 Ex: 520.568.9120
 www.maricopa-az.gov

COST SUMMARY/FEE SCHEDULE
(ATTACHMENT A)

In accordance to the specifications as described in this Request for Proposal document, we agree to provide the Economic Development Strategic Plan at the price(s) stated below:

Provide a firm fixed not-to-exceed price for all work/services described in the Scope of Services. The Offeror shall provide a detailed/itemized breakdown of proposed amount in table below. All fees should include, but not limited to: site visits, travel expenses, *etc. (*Please provide detailed itemization).

FIRM FIXED NOT TO EXCEED AMOUNT

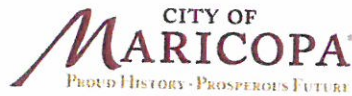
TOTAL PROJECT COST \$ 65,000.00

Provide an itemized breakdown of the firm fixed not to exceed amount (NTE):

Item No.	Description of Service/Fees	Amount
1.1	Project Setup	No charge
1.2	Public Input/Stakeholder Engagement (SWOT)	\$10,000.00
1.3	Stakeholder Engagement/Collaborative Roundtable	\$ 7,500.00
2.1	Economic Conditions Snapshot (Market Assessment)	\$ 7,500.00
2.2	Business Location Trends Analysis	\$ 5,000.00
2.3	Survey/Inventory Maricopa Assets	No charge
2.4	Assess Future Impact of Current Develop. Projects	\$ 2,500.00
2.5	Targeted Economic Sectors & Business Case Analysis	\$25,000.00
3.0	Outcomes: Final E.D. Strategy & Implementation Plan	\$ 7,500.00

APPENDIX - ADDITIONAL FORMS REQUIRED BY RFP

Vendor Questionnaire



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 Maricopa, AZ 85138
 Ph: 520.568.9098
 Fax: 520.568.9120
 www.maricopa-az.gov

VENDOR QUESTIONNAIRE (ATTACHMENT B)

Name of Firm: IO.INC	
Years in Business providing similar services: 12	
License No(s) and Type: (Submit a copy with the proposal) City of Maricopa Business License	
Number of employees servicing this contract: 1	
Verifiable References: Include the name, contact person, address and telephone number of five (5) firms or government organizations for whom similar services have been provided. References must be current, and should be relevant to the required services. Provide description of services provided and dates of service.	
Firm/Government Agency Name: Arizona Commerce Authority	
Contact Person: Mr. Keith Watkins	Phone: 602-845-1278
Address: 333 N. Central Ave., Ste. 1900 Phoenix, AZ 85004	E-Mail Address: keithw@azcommerce.com
Dates provided: 2013-2016	
Description of services provided: Economic Development Strategic Planning	
Firm/Government Agency Name: City of Phoenix Community & Econ. Dev. Dept.	
Contact Person: Ms. Diane Nakagawa	Phone: 602-261-8013
Address: 200 W. Washington St., 20 th Fl. Phoenix, AZ 85003	E-Mail Address: diane.nakagawa@phoenix.gov
Dollar value of work: \$125,000 total	Dates provided: 2011-2012; 2015

Description of services provided: Economic Development Strategic Planning and Updates	
Firm/Government Agency Name: Town of Sahuarita	
Contact Person: Mr. Victor Gonzalez	Phone: 520-822-8800
Address: 375 W. Sahuarita Center Way Sahuarita, AZ 85629	E-Mail Address: vgonzalez@sahuaritaaz.gov
Dollar value of work: \$87,500	Dates provided: 2014-2015
Description of services provided: Economic Development Strategic Planning	
Firm/Government Agency Name: City of Scottsdale Economic Development Dept.	
Contact Person: Ms. Danielle Casey	Phone: 480-312-7601
Address: 3839 N. Drinkwater Blvd., 2 nd Fl Scottsdale, AZ 85251	E-Mail Address: dcasey@scottsdaleaz.gov
Dates provided: 2014-2015	
Description of services provided: Economic Development Strategic Planning	
Firm/Government Agency Name: Town of Gilbert Economic Development Office	
Contact Person: Mr. Dan Henderson	Phone: 480-503-6891
Address: 90 E. Civic Center Dr. Gilbert, AZ 85296	E-Mail Address: dan.henderson@gilbertaz.gov
Dates provided: 2012	
Description of services provided: Economic Development Strategic Planning	
Subcontractors: List subcontractor(s) that will participate in carrying out the obligations of any resulting contract.	



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 Maricopa, AZ 85138
 Ph: 520.568.9098
 Fx: 520.568.9120

Subcontractor Contact Name: Mr. Danny Court, Elliott D. Pollack & Co.		Phone: 480-423-9200
Subcontractor Address: 7505 E. 6 th Ave., Ste. 100, Scottsdale AZ 85251		Email: court@edpco.com
Category of Work: Economic Research		
Contractor License Type: N/A		Type/Number: N/A
Subcontractor Contact Name:		Phone:
Subcontractor Address:		Email:
Category of Work:		
Contractor License Type:		Type/Number:
List any other information which may be helpful in determining your qualifications for this contract:		
Debarment/Suspension Information: Has firm or any of its principals been debarred or suspended from contracting with any public entity?: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", provide in an attachment to this form the contact information for the public entity and state the reason for debarment or suspension, including the period of time for such debarment or suspension.		
Does your firm accept electronic payments through: Electronic Funds Transfer (EFT): <input type="checkbox"/> Yes <input type="checkbox"/> No Automated Clearing House (ACH): <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No List any additional discounts that may result from paying electronically: _____ % Discount		
Insurance: Provide name of insurance carriers that provide coverage for your company.		
Automobile:	The Hartford	
General/Contractor Liability:	The Hartford; AON Risk Management	
Bonding:	N/A	

Copy of City of Maricopa Business License



CITY OF MARICOPA
39700 W Civic Center Plaza
Maricopa, AZ 85138
(520) 316-6851

BUSINESS LICENSE

In accordance with the provisions of the City of Maricopa, a license is hereby granted to operate the business referenced below.

Type
SERVICE
CONSULTING

BUSINESS LOCATION: OUT OF TOWN BUSINESS

Number	Issued
2346	12/03/2015
License Fee	Expires
50.00	12/31/2016

WORLDWIDE GROWTH ENTERPRISES, INC.
d/b/a IO.INC.
3104 E. CAMELBACK ROAD
SUITE 1000
PHOENIX, AZ 85016

BY: *Vanessa Burtis*
City Clerk/Finance Director

POST IN A CONSPICUOUS PLACE

NON-TRANSFERABLE