



ADDENDUM # 1
to that certain Request For Qualifications (“RFQ”) of
The Atlanta Development Authority d/b/a Invest Atlanta (“Invest Atlanta”) issued
on June 23, 2023 and relating to a Citywide Anti-Displacement Tax Fund

Addendum Date: July 14, 2023

The following changes, additions, and/or clarifications are made to the RFP as of the Addendum Date. All capitalized terms not defined herein shall have the meanings ascribed to them in the RFP.

QUESTIONS SUBMITTED TO INVEST ATLANTA ON OR PRIOR TO JULY 14, 2023:

Invest Atlanta received some questions that were beyond the scope of the RFP. However, for the benefit of all potential respondents, we have elected to publish the following questions, edited for clarity, along with answers thereto.

A. Questions Regarding the Citywide Anti-Displacement Tax Fund

1. Are there any special software requirements needed to manage this program?

Answer: The software to be used has not yet been identified.

2. Do you have any in-house CRM tools that you are currently using?

Answer: The software to be used has not yet been identified.

3. Are you expecting us to provide all of the CRM tools needed to manage this program?

Answer: The software to be used has not yet been identified, but will be provided by Invest Atlanta.

4. What is the estimated number of participants per year?

Answer: 25 participants in 2024 with an increase to 50 participants in 2025.

5. To confirm 3,000 residents are within the targeted areas and you are expecting 60% total participation, is this correct?

Answer: We expect 60% anticipated participation, based on participation from other similar programs. However, it could be more.

6. What contact information do you have for those individuals living within the desired census neighborhoods (for example: email addresses, phone numbers, etc.)?

Answer: None, as interested persons will apply at will.

7. What type of marketing, educational, and outreach would you like to see for this program?

Answer: Extension education and outreach will be required.

8. What type of marketing, educational, and outreach techniques were used in the past?

Answer: This is a new program; however, other programs have used community engagement, mailings, cold calling, etc.

9. Which techniques produced the best returns/participation rates?

Answer: This is a new program that is not market tested.

10. What types of estate planning tasks will be required?

Answer: Those will be determined along with the chosen program manager.

11. Can you provide the specific task requirements?

Answer: Those will be determined along with the chosen program manager.

12. How was the Anti-Displacement Program managed in the past?

Answer: This is a new program launch.

13. Who managed it?

Answer: This is a new program launch.

14. How many full-time employees were dedicated to managing this program in the past?

Answer: This is a new program launch.

15. What were some of the pain points from managing this program in the past?

Answer: This is a new program launch.

16. What areas of the program management require the most improvement?

Answer: This is a new program launch.

17. For the pilot program - is the goal to have those individuals living within the desired census neighborhoods fill out a form to determine eligibility only? OR are you expecting any additional actions as part of this contract (i.e. payments, reduction in taxes and etc.)?

Answer: The scope of services included in the RFP outlines the program manager requirements.

18. Can Invest Atlanta define "ongoing fundraising" as mentioned in paragraph 2 of the introduction?

Answer: All fundraising responsibilities will be handled by the selected fundraiser and do not apply to the Administrator RFP.

19. Is the total budget for this RFP \$4.6M or is the intent to award the total program budget of \$40.7M over 20 years under this RFP?

Answer: Those terms will be negotiated with the selected respondent.

20. Are there any caps on administrative/professional services costs?

Answer: All proposals will be considered.

21. Is there any software the winning bidder is expected to use?

Answer: The software to be used has not yet been identified,

22. What are the winning bidder's anticipated evaluation/reporting requirements for the pilot program?

Answer: Monthly reporting will be required.

23. Is this a 1-year pilot?

Answer: The program will be 20 years for all pilot applicants.

24. What is the anticipated number of participants for this pilot period?

Answer: The anticipated number of pilot participants is 1,854.

25. For the life of the project?

Answer: There are currently 13,207 possible applicants in the City of Atlanta.

26. As there is a separate RFP for capital fundraising to support the scope of work of THIS RFP, please clarify if fundraising is still a responsibility of the program oversight board as identified on page 7 of the RFP.

Answer: All fundraising responsibilities will be handled by the selected fundraiser and do not apply to the Administrator RFP.

27. Does the program oversight board have to be named in the proposal submission, or is it sufficient for the applicant to commit to the establishment of a program oversight board upon successful award of the project?

Answer: The respondent must agree to establish the program oversight board upon successful award of the project.

28. Our insurance carrier will no longer issue a certificate of insurance that names additional insured without a contract in place. Would it be sufficient to provide a certificate of insurance indicating that the additional insured will be added upon successful award of the project?

Answer: Yes, that would be sufficient.

29. What is the expected average annual amount of annual tax per program participant for the identified pilot area?

Answer: The expected average annual amount is approximately \$981.00 per program participant.

30. How is the base property tax amount determined for program participants?

Answer: The property tax amount is derived from appraisals. Property taxes for homeowners in the City of Atlanta are made of three separate taxes, Fulton County, City of Atlanta, and Atlanta Public Schools.

31. When is the contract for this scope of work expected to be executed?

Answer: First Quarter 2024.

32. When is the program expected to begin?

Answer: Second Quarter 2024.

33. Is there a maximum tax assistance amount per client? (e.g., the program will only cover up to \$1,000 delta per client)

Answer: No there is no maximum amount of assistance.

34. Will the selected contractor be provided with the specific data for the pilot area? (e.g., names and addresses that make up the 3,000).

Answer: No, eligible homeowners are encouraged to apply.

35. What will be the process for the client's tax payment? (e.g., will the program manager receive the tax relief funds and write the check, or will Invest Atlanta?).

Answer: All tax payment increases will be made directly to the Fulton County Tax Commissioner's office.

36. Must an application meet all of the eligibility and/or expanded eligibility criteria in order to participate in the program (e.g., the applicant just turned 64)?

Answer: Yes, the applicant must meet the stated eligibility criteria.

37. The study identified other low-income (senior and disabled) households in the Pilot footprint. Are they eligible for the Pilot program?

Answer: Applicants must meet the stated eligibility criteria.

38. *"The 3,000 households that are currently utilizing the exemptions represent the potential pilot program participants. It is projected that 60% of the households (1,854), can be expected to participate."* – does 60% represent applicants 65+?

Answer: The 60% projection of participation is inclusive of seniors 65+ that have a homestead exemption. These geographies were selected due to increasing home values in these areas, the high concentration of homeowners under 60% AMI, and low-income senior homeowners.

39. *"No encumbrances attached to the property"* – If there is a water lien on the property, but a payment plan is established, is this allowable?

Answer: Water liens with a payment plan are eligible.

40. How long is the Pilot Program period?

Answer: 20 years

41. Will Neighborly be used for this program?

Answer: The software to be used has not yet been identified.

42. Given that "the program budget of \$40.7M was determined by examining the estimated tax increase for 60% of the eligible applicants in the pilot area (1,854 households) and includes the costs of annual administration, outreach, and supportive services over the 20-year term," What timeframe should the budget cover (e.g., one year, twenty years)?

Answer: 20 years

43. What percentage of the total \$40.7M is estimated to be allocated towards "the annual administration, outreach, and supportive services over the 20-year term"?



Answer: Approximately 11% of the budget will be allocated towards, administration, outreach and supportive service

END OF ADDENDUM NO. 1