



Updated Scope of Work

Economic Development Plan Consulting Services

Fourth Economy and EQT By Design were selected to work together.

- Each firm submitted an individual proposal and was interviewed by the selection committee.
- After review, the City of Madison asked both firms if they would be willing to collaborate to provide the intended scope of services.
- Fourth Economy and EQT By Design have been meeting over the past few weeks and working together to combine their scopes and approaches.

Fourth Economy helps communities and organizations create strategic, equitable, and resilient economies.



Economic Equity

Bold plans that specifically address economic disparities especially focused on communities of color.



Economic Strategy

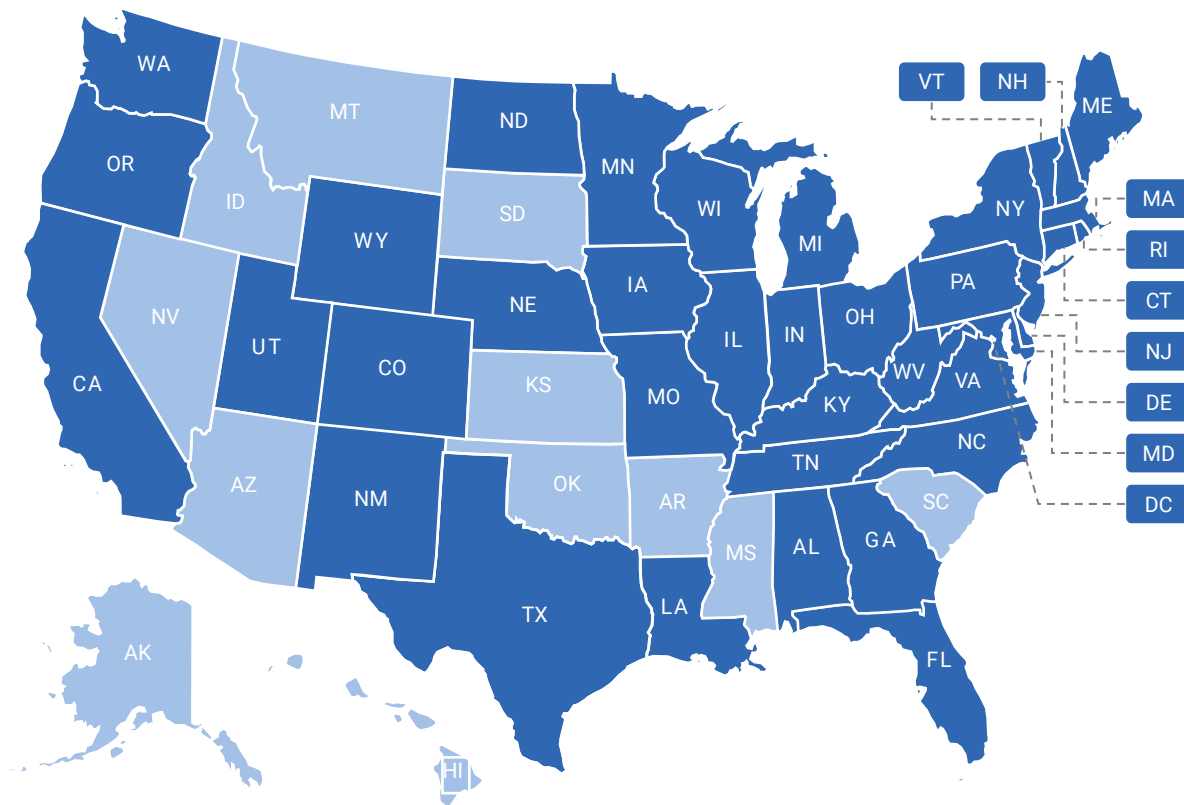
Implementable plans that help communities create a vision and portfolio of strategies designed for impact.



Economic Resilience

Forward-looking strategies that prepare to be more economically and environmentally resilient for the next crisis.

- Economic Development Administration
- Interise
- National Governors Association
- Jobs for the Future Foundation



EQT By Design

Overview

EQT brings 25+ years of experience in Dane County in equity-centered community engagement, strategic planning, change management, and organizational culture design within government, community, and the corporate and nonprofit sectors. EQT aims to inform, engage, disrupt, and facilitate action centered around equity and justice.



Philosophy + Methods

EQT By Design, based in Madison, Wisconsin, is a woman- and minority-owned business with experience in strategic advising and planning to help organizations and companies develop and design their engagement and inclusion activities to meet their diversity needs for today and tomorrow.

EQT By Design (EQT), believes that success is, by design, relationships and networks with connected, engaged and diverse community members. Our strength lies in connecting and bridging perspectives made up of racially, ethnically, and linguistically diverse community members, as well as other intersectionalities.

Through a design thinking process we help to identify and address gaps in relationships, connections, and perspectives. Taking action on these connections and diverse perspectives evolves into systems that change and build knowledge-informed solutions for your organization that lead to and support equity, inclusion and belonging centered goals and outcomes

Our Team

4th Economy - Analysis

EQT by Design - Engagement



**Rich
Overmoyer**
—
Project Director



**Eve
Critton**
—
Project Manager and
Engagement Lead
Based in Chicago



**Anne
Jensen**
—
Analysis Lead



**Annette
Miller**

Engagement
Director



**Mathias Lemos
Castillo**
—
Engagement
Consultant



**Naman
Siad**

Project
Coordinator

Fourth Economy and EQT By Design will collaborate as partners to create a seamless workflow, knitting together informed analysis and equity-driven engagement through robust project management and quality control.

- Through a standing Bi-Weekly Client Check In all together, both firms will ensure transparency of action and thoughts to allow for a shared understanding of the process, deliverables, and timeline to completion.
- On off weeks, Fourth Economy and EQT By Design will have a standing Consultant Check In to coordinate and ensure alignment in the project process and deliverables.

Fourth Economy and EQT By Design will support each other in all three tasks

- **Task 1: Research and Data Gathering, Data Analysis, and Narrative Creation**
 - Lead: Fourth Economy
 - Support: EQT By Design
- **Task 2: Resident Engagement and Business Community Engagement**
 - Lead: EQT By Design
 - Support: Fourth Economy
- **Task 3: Coordination and Collaboration Between Services**
 - Co-Lead: Fourth Economy, EQT By Design

Questions to Consider for EDC

Please consider the following questions and email your thoughts and ideas to George Reistad at:
greistad@cityofmadison.com by **Friday, December 6, 2024**

- Who should be included in the Stakeholder Advisory Group?
- Who should be included in stakeholder and community outreach?

City of Madison Economic Development Plan Consulting Services

Updated Proposal from Fourth Economy and EQT By Design

Overview

Fourth Economy and EQT By Design will collaborate as partners to create a seamless workflow, knitting together informed analysis and equity-driven engagement through robust project management and quality control. Through a standing Bi-Weekly Client Check In all together, both firms will ensure transparency of action and thoughts to allow for a shared understanding of the process, deliverables, and timeline to completion. On off weeks, Fourth Economy and EQT By Design will have a standing Consultant Check In to coordinate and ensure alignment in the project process and deliverables.

Complete Scope of Work

Task 1: Research and Data Gathering, Data Analysis, and Narrative Creation

1.1: Report Review and Ecosystem Scan

It is essential that an analysis process builds upon the work that has come before it. Therefore, Fourth Economy will review previous economic development plans and other relevant reports. In addition to gathering documents from the client team, we will do an ecosystem scan via desktop research to continue building our team's foundational knowledge on Madison's socioeconomic landscape. EQT By Design will also use their local network to recommend additional reports for review during this phase of work. Fourth Economy will capture key data, compile notes on existing organizations and programs, and review and categorize previous strategies. These findings will be organized to ensure their use and utility throughout the process.

1.2: Baseline Analysis

Our team combines qualitative research through engagement with quantitative assessments to provide a robust baseline economic picture for each community where we work. We believe in thoroughly understanding the economic structure, assets, and challenges that provide the base for developing actionable strategies. Fourth Economy will delve into various data sources and information to analyze Madison's economic structure and develop a keen understanding of the community's economic anatomy and how it links to the broader economy.

1.2: Analysis Deep Dive

Fourth Economy will gather feedback on the Baseline Analysis from the client team and the Stakeholder Advisory Group. We will incorporate this feedback and create a plan for a deeper dive into analysis. This will likely cover topics included but not limited to:

- Improving the creation of generational family wealth in Madison communities;
- Retaining more dollars circulating in Madison's economy;
- How can we better leverage economic development work to build great places throughout the City;
- Supporting small business development and entrepreneurship;
- City support for larger, basic sector employers; and
- Other useful data analysis related to workforce development, housing, transportation, and childcare.

More detailed information on the data sources and type of analysis that Fourth Economy will use can be found in the originally submitted proposal.

1.3: Data Presentations

Fourth Economy will share data with the client team in the form of slide decks and/or written memos for iterative discussion and feedback. The team will also work with the City of Madison and EQT By Design to prepare data for presentations to the EDC and/or public consumption in workshops or focus groups by producing infographics, one pagers, or other desired content where appropriate.

Task 2: Resident Engagement and Business Community Engagement

EQT By Design understands that impactful analysis is informed by strong engagement. Our strategy and framework is designed to collect input from a cross-section of stakeholders (large and small businesses, institutions, developers, and community-based organizations and nonprofits) that also represent and are inclusive of diverse backgrounds connected to race, age, culture, ability, and gender identity. Our engagement efforts will be community-driven, equity-centered, and will incorporate any existing data provided by our client partners while also ensuring we incorporate additional relevant sources from key stakeholders.

Our approach will ensure that we center the vision insight and needs of the City of Madison with Fourth Economy and EQT By Design (henceforth called the Planning Team) ensuring they lift up best practice data analytics informed and supported by inclusive engagement strategies from key engaged stakeholders throughout Madison.

The following approaches and tools seek to affirm and confirm community engagement participation, generate awareness, and gain stakeholder insight and influence into the City's future economic development plan for the next five years. While also seeking to share out and balance the needs of ALL by this same economic planning design. These proposed approaches and strategies hinge upon discussion with the City of Madison Economic Development Division (City EDD) and their goals while also seeking feedback from Fourth Economy to ensure their research and data also informs. EQT will take all of that insight and apply the following tools. We do want to

be clear that design implementation is co-created and informed by what is discovered and once there is a shared and clear baseline for start-up engagement tools are then applied to best meet it.

2.0 Stakeholder List

EQT will ask that the City EDD establish a stakeholder list (EQT will provide a template) that lists people and/or organizations who should be participating in this engagement process. Specifically, this list should identify who should complete or engage with what parts of the engagement opportunities offered – survey, workshops, focus groups, Stakeholder Advisory Group, and/or the Build Session.

EQT will also ensure that it invites and promotes out to their own curated list of communities to help fill in gaps and shore up representation. Our goal is to ensure strong representation from individuals, neighborhoods, and issue areas that are important to informing the work and that it is representative of the community at large looking specifically at cultural and community intersectionality and identity.

2.1 Survey

Typically, EQT finds that a general survey is a great kick-off strategy as it does help establish a shared baseline understanding of community needs, desires and values. EQT also likes it as a “general” tool that is designed for everyone who wants to engage and participate.

- One (1) Survey (paper and online)
 - Input from the general community will seek to identify important economic development values, principles or goals that should be used to help inform the final plan.
 - An initial draft of survey questions will be solicited by EQT from Planning Team
 - A final draft of the survey will be reviewed by the Stakeholder Advisory Group
 - EQT will set up a communication strategy for email and social push for the survey
 - City EDD will be asked to set up a landing page if appropriate for this project
- Survey Data
 - EQT will analyze and theme the results of the survey in the following order
 - Shared first w/ Fourth Economy
 - City EDD
 - Stakeholder Advisory Group
- Final results of the survey data once reviewed and analyzed by the client will then inform the Analysis Deep Dive by Fourth Economy.

2.2: Public Workshops

These public workshops will be used as additional engagement strategies to help keep the Madison community engaged and aware of the process and efforts. There will be two (2) Public Workshops - where small and large key business stakeholder community members can share feedback on the work before and after strategy development.

- Public Workshop (kickoff)
 - An initial list of invitees from Stakeholder List and reviewed by Stakeholder Advisory Group
 - A final design and process will be reviewed by the Planning Team and Stakeholder Advisory Group
 - EQT will set up a communication strategy for email and social push for the workshop
 - EQT will analyze and share forth the results of the workshop to the Planning Team
- Public Workshop (affirmation)
 - Community members will be invited again from Stakeholder List and any new interested parties again reviewed by Stakeholder Advisory Group
 - A final design and process will be reviewed by the Planning Team and Stakeholder Advisory Group
 - EQT will set up a communication strategy for email and social push for the 2nd workshop
 - EQT will analyze and share forth the results of the workshop to the Planning Team

Results from the Baseline Analysis, Survey, and Public Workshops will be used to inform the development and strategy focus on implementation of targeted focus groups and also start building a template for the Build Session.

2.3: Targeted Focus Groups

Up to (7) Targeted focus groups – Will be implemented to ensure representation and inclusion of historically diverse and underserved groups and to focus on specific key economic development topics that may emerge from the survey engagement. This strategy will inform and amplify data, research and recommendations that will help inform and support the proposed economic development plan.

These groups will be formed based on the Survey, Baseline Analysis and Stakeholder Advisory Group insight. Further, these groups will be used to help establish and identify content and strategy for the Build Session and many may even be participants of the final Build Session as it will be these folks who will know many of the issues and topics best.

- EQT + Fourth will identify and establish the key topics and targeted focus groups
- EQT will schedule and facilitate the sessions
- Data from these sessions will be collected and analyzed by EQT and shared forward in this order
 - Shared first w/ Fourth Economy
 - City EDD
 - Stakeholder Advisory Group

Results from the above engagement through focus groups will be used to help inform the design and strategy of the Build Session.

2.4: Stakeholder Advisory Group

Identifying a stakeholder advisory group (4-5 meetings, up to 20 individuals) is designed to strike a balance between furthering the values, principles and/or goals of the process while also incorporating the voices and perspectives of the community and in particular voices that have not been traditionally included or incorporated into the design and process.

This group offers historical and prospective context to help overall project success; and insights into different areas of how the community is impacted by the local economy. This then ensures a more comprehensive understanding and sets design for a more robust longer term economic development planning strategy. Further, the advisory group serves as a bridge to the progress of the work by providing accurate and consistent information to the community. Making them an important asset for both the process itself and the many stakeholders sought for this project.

The Advisory Group will be asked to engage and participate with other engagement activities such as the Public Workshops, Focus Groups, and the Build Sessions with the intention of limiting engagement fatigue while recognizing the impact of their participation. Specifically, a draft strategic plan informed by their input and actions throughout the process. Communication will be established to keep this group connected with the work and activities along the process and into the community.

Fourth Economy and EQT By Design will work with your team to identify appropriate members, establish clear roles and responsibilities, and facilitate regular meetings throughout the project.

Suggested areas of representation for seeding the advisory group:

1. Small Business Owner - Local retail shop or restaurant proprietor
2. Large Employer Representative - HR Director or CEO of a major company in Madison
3. NonProfit CEO Representative - Director of a neighborhood association or community center
4. Community Based Advocacy Representative - advocacy of key social and economic issues
5. Financial Institution Representative - Local bank manager or credit union executive
6. Childcare Provider - Owner of a daycare center or early childhood education specialist
7. Education Sector Representative - University, College, or School district
8. Workforce Development Professional - Director of a job training program
9. Technology Sector Representative - Startup founder or tech company executive

2.5 Build Session (confirmation)

A Build Session is an interactive workshop to brainstorm, prioritize, and build solutions. Build Sessions emphasize the focus on moving past talking about problems and toward building solutions. This process will engage the stakeholders who know the issues best, and those who will likely be involved in implementing the solutions. This co-creation is critical to developing realistic solutions that have buy-in from key stakeholders.

- Fourth Economy will develop the working papers (see more below) based on analysis and stakeholder engagement to date

- Fourth Economy will develop the workshop design with insight from the Planning Team + Stakeholder Advisory Group
- Fourth Economy and EQT will work with the City and Stakeholder Advisory Group to identify potential participants who will be invited to the Build Session.
- EQT will implement the Build Session engagement strategy and staff the onsite session with support from Fourth and City EDD
- Fourth and EQT will synthesize the outputs from the session and review with City EDD

Fourth Economy will develop working papers that will be shared with participants in advance of the Build Sessions. These working papers will evolve from analysis and stakeholder engagement, and will include:

- Ideas and insights from the community engagement efforts to date
- Supporting data and analysis
- Related strategies from existing plans
- Identification of external or internal issues related to the focus area
- If appropriate, possible scenarios that should be considered
- Examples of what other communities are successfully doing in the area of focus

Build Sessions will be organized by topical focus areas elucidated through earlier analysis and engagement. Within each Build Session, breakout groups will focus on clear issues and opportunities around which to develop strategies. These will be framed as “How Might We” statements, e.g. “How Might We... better leverage our existing industries to spur entrepreneurship and attract/retain young talent?”.

During the Build Sessions, participants review the working papers, brainstorm and prioritize potential strategies, and then identify the actions, stakeholders, and resources required for implementation. These sessions can occur in person or virtually (using Zoom and a collaboration software called XLeap).

After the Build Sessions, the Stakeholder Advisory Group will review the findings and prioritize strategies based on a number of criteria including alignment with the vision and goals, and with an aim to create a balanced portfolio of easily achievable actions and bold, innovative change.

2.6 Communication, Socials + Language Accessibility

Throughout the engagement process, community-wide information distribution - in partnership with City EDD - will include, as appropriate, use of the city landing page, email marketing, informational fliers, social media marketing, and community / audience specific content to inform the public and drive participation among general and diverse private, public, nonprofit and community based stakeholders. This also includes video particularly if a public workshop or session is held virtually.

- EQT will develop appropriate communication strategies for community engagement
 - Socials - Facebook, Community Listservs and community based outlets
 - Newsletter
 - Email
 - Video if applicable and appropriate
- Share drafts with Planning Team and others as appropriate
- City of Madison

- EDD landing page – EQT will work with staff to determine appropriate communication strategy
- EQT will engage EDD department staff along with other city staff who do engagement to help push information into the community
- Language Accessibility
 - EQT will offer Spanish Language translation
 - EQT will work with City of Madison Dept of Civil Rights for Hmong translation

Task 3: Coordination and Collaboration Between Services

3.1: Synthesis

Fourth Economy and EQT By Design will collaborate to synthesize the results of data analysis and insights from engagement throughout the project process. Following Build Sessions, the two firms will work together to create a framework of potential themes and strategies for the City of Madison. We will work with the client team to determine the most useful framework and deliverables from this synthesis.

3.2: Biweekly Client Meetings

Through a bi-weekly check-in process with the client team, Fourth Economy and EQT By Design will ensure transparency of action and thoughts to allow for a shared understanding of the process, deliverables, and timeline to completion.

3.3: Biweekly Consultant Meetings

In addition to bi-weekly client meetings, EQT By Design and Fourth Economy will meet with each other on a bi-weekly basis to coordinate and ensure alignment in the project process and deliverables.

3.4: Monthly Reporting

Both firms will report and provide invoices on a monthly basis.

3.5: Project Management

Fourth Economy and EQT By Design will each provide project management and quality control for their individual scopes of work. The two firms will also coordinate with each other through regular meetings and communications.

PROJECT TIMELINE BELOW

	2024	2025												2026					
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Research and Data Gathering, Data Analysis, and Narrative Creation																			
Review and Ecosystem Scan	X	X																	
Baseline Analysis			X	X	X														
Analysis Deep Dive						X	X	X											
Data Presentations					X			X											
Resident Engagement and Business Community Engagement																			
Survey				X	X	X													
Public Workshops					X						X	X							
Targeted Focus Groups						X	X	X	X										
Stakeholder Advisory Group			X		X				X		X			X					
Build Sessions										X									
Communication, Socials + Language Accessibility				X	X	X	X	X	X	X	X	X							
Coordination and Collaboration Between Services																			
Synthesis											X	X	X	X					
Biweekly Client + Consultant Mtgs	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Monthly reporting	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Project Management	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Budget Breakdown

Fourth Economy Fee: \$115,000

EQT By Design Fee: \$85,000

Fourth Economy Budget

	2024					2025					2026						
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Hours	Cost	
Research and Data Gathering, Data Analysis, and Narrative Creation																	\$51,160
Report Review and Ecosystem Scan	X	X													48	\$9,680	
Baseline Analysis			X	X	X										80	\$15,600	
Analysis Deep Dive						X	X	X							80	\$15,600	
Data Presentations					X			X							52	\$10,280	
Resident Engagement and Business Community Engagement																	\$21,820
Survey			X	X	X										8	\$1,360	
Public Workshops					X	X				X	X				12	\$2,500	
Targeted Focus Groups					X	X	X	X							10	\$2,200	
Stakeholder Advisory Committee			X		X		X		X		X			X	36	\$7,880	
Build Sessions										X					36	\$7,880	
Communication, Socials + Language Accessibility															0	\$0	
Coordination and Collaboration Between Services																	\$41,880
Synthesis										X	X				28	\$6,520	
Biweekly client meetings	X	X	X	X	X	X	X	X	X	X	X	X	X	X	56	\$12,740	
Biweekly consultant meetings	X	X	X	X	X	X	X	X	X	X	X	X	X	X	56	\$12,740	
Monthly reporting	X	X	X	X	X	X	X	X	X	X	X	X	X	X	14	\$2,660	
Project Management	X	X	X	X	X	X	X	X	X	X	X	X	X	X	20	\$5,320	
Travel Time					X					X					10	\$1,900	
Total Labor															546	\$114,860	
Stipends for Community Engagement																	\$0
Travel and Expenses																	\$140
Total Estimated Fixed Cost Not to Exceed																	\$115,000

EQT By Design Budget

Task	EQT staff	Cost
Project Management + Coordination	AM, MLC, NS	\$32,500
Survey (1 survey)	SZ + NS	\$8,500
Workshops (2 sessions) + Build Session (1)	AM, MLC, NS	\$17,250
Focus Group (7 sessions)	AM, MLC, NS	\$10,500
Communications, Socials, Language Access	MB + MLC	\$6,250
Stakeholder Advisory Group (up to 20 members)	AM + MLC	\$10,000
TOTAL		\$85,000

EQT Staff Team: Annette Miller (AM) | Mathias Lemos Castillo (MLC) | Naman Siad (NS) - key staff on the project with Sarah Zepnick (SZ) | Matthew Braunginn for technical support

OCTOBER 10, 2024



Proposal

13077-0-2024-BP: ECONOMIC DEVELOPMENT PLAN CONSULTING SERVICES

SUBMITTED BY FOURTH ECONOMY FOR THE CITY OF MADISON



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**See separate attachment for Excel Workbook 2A*

Fourth Economy helps communities and organizations create strategic, equitable, and resilient futures.

Experience and Project Capability

Firm Background and Staff

Fourth Economy Consulting offers services that help our clients take meaningful action to achieve innovative, impactful, and lasting outcomes. We aim to create more prosperous communities and organizations by working in partnership with government, industry, and community leaders.

We engage with residents and community leaders through a human-centered approach that recognizes the unique experiences and needs that exist in a place. We blend quantitative and qualitative inputs at every part of the consulting process, developing realistic recommendations that can be easily understood and readily implemented.

We strive to become partners with our clients and understand their needs and aspirations. We recognize that each engagement requires a tailored and adaptive approach. As our name implies, we believe that there needs to be a better approach to economic development, a Fourth Economy that serves people.

The City of Madison Consulting Team

As we reviewed the proposed scope of work, the points of interest, and background research regarding the City of Madison, we identified our team members who could best serve our approach.

Rich Overmoyer, CEO

Role: Project Director

Base Location: Providence, RI

Since Fourth Economy's formation in 2010, Rich has been leading the charge to help clients translate complex ideas and data into solutions for their communities. With more than eighteen years of consulting experience, Rich has worked with a wide range of organizations, governments, and private sector leaders who are working to improve their communities and economies. He thrives amid challenges as well as evolving efforts that necessitate cross-system collaboration.

Prior to heading Fourth Economy, Rich utilized his strategic and entrepreneurial skills to create several successful public-private initiatives, including efforts to increase the evolution of manufacturing, foster a sustainable tourism sector, address workforce housing shortages, provide support for start-up companies, and

help communities understand resilience risks. Throughout Rich's career, his work has won awards from national trade associations and more importantly made a significant impact in communities throughout the country.

Eve Critton, Senior Consultant

Role: Project Manager

Base Location: Chicago, IL

Eve works at the nexus of the public realm, sustainable economic development, and equitable solutions to persistent problems. This translates into work that helps people understand, advocate for, and improve their communities. Her portfolio emphasizes the softer side of economic development, examining strategic policy, programming, initiatives, and funding to create economic opportunity for all.

Eve leads projects across the country, from the statewide Comprehensive Economic Development Strategy for Indiana to the housing and economic development portions of the Unified Plan for a county near Atlanta, Georgia. Her economic development work prioritizes access to critical amenities, services, and infrastructure alongside quality of life and place improvements. Eve also helps organizations expand their capacity and impact through creative programming, development, partnership building, and strategic planning, such as the Blue Ridge Parkway Foundation and the Humane Animal Rescue of Pittsburgh. Eve enjoys helping her clients and their communities grow and prosper.

Neeky Dennis, Senior Consultant

Role: Engagement Lead

Base Location: Cleveland, OH

Denique "Neeky" Dennis has an unwavering commitment to fostering equitable, inclusive, and vital communities. Her most notable professional pursuits have been in the areas of violence prevention/intervention, collective impact facilitation, and asset-based community development. She especially enjoys fostering the collective efficacy and franchise of communities to envision, co-create, and sustain development

efforts. To accomplish this, she takes an appreciative inquiry approach which recognizes and includes members of both formal and informal sectors. She encourages innovation and transformation by leaning into the "what ifs" and "why nots", and champions inclusion by constantly questioning whose interest is or is not represented at decision-making tables.

Anne Jensen, Consultant

Role: Analysis Lead

Base Location: Richmond, VA

Anne combines her research and analysis skills into actionable, elegant solutions for communities looking toward an equitable, resilient future. She especially thrives while working closely with communities to develop their vision of a stronger economy, and she uses qualitative and quantitative data to meet the day-to-day challenges of economic development work. Anne has worked closely on projects related to economic development, housing development, and community resilience in her tenure at Fourth Economy.

Oshane McCrae, Consultant

Role: Research Support

Base Location: Silver Spring, MD

Oshane is a cross-disciplinary strategist with a passion for supporting underinvested in people & communities to achieve their full potential. He focuses primarily on developing the capacity of small businesses as economic engines & anchors and infusing concepts of environmental sustainability into community development.

Raised in the Bronx, NY, he deeply understands how the availability of resources impacts a community's ability to invest in itself and grow, and as a result finds it critical to get flexible & patient forms of resources to communities and places long overdue for investment. He specializes in root cause analysis and works with people of all backgrounds to co-create long-term, equitable and paradigm shifting solutions that align with their visions and the outcomes they want to see.

Firm Experience and Technical Capacity

Fourth Economy has assembled a team of 19 experts who have worked in economic development agencies, industry, non-profit organizations, and tier-one research institutions.

Our team works at the intersection of diverse systems, from community to economic development, from transportation to real estate development, and from legacy industry to entrepreneurial ecosystems. We use our experience in economic development to frame environmental, social, and cultural issues in a context that resonates with investors and public policy leaders. This is demonstrated through our award-winning approach to helping communities leverage their quality of place assets to change their economic and demographic paths.

Advancing Equity and Economic Opportunity

Inclusive, human-centered economies are at the heart of strong, equitable, resilient communities. This belief has led Fourth Economy to commit to daylighting economic disparities and working with communities to develop actionable strategies to correct imbalances.

Our experience fostering inclusive development and identifying economic opportunity has taken many forms over the years, with a few examples noted here:

We worked in concert with CenterState CEO to support the work of the [Central New York Community Engagement Committee](#) in the creation of a [Community Priorities Document \(CPD\)](#) that will guide investment of a \$500M Community Investment Fund that is singularly focused on ensuring that the results of a historic investment by Micron and the Green Chips Act create positive change in previously ignored and disadvantaged communities. Fourth Economy facilitated broad-based community engagement, data analysis, and coordinated

the drafting of the CPD, ensuring the voices of more than 12,000 residents were reflected in the final product.

In an effort to preserve wealth among at-risk, predominately BIPOC households, we worked with [Local Initiatives Support Corporation \(LISC\) Jacksonville](#). We leveraged our analysis capabilities to identify clusters of heirs' properties (homes where a homeowner has died without formal estate planning, creating barriers for their relatives to claim ownership). Once clusters were identified, we helped the client prioritize outreach efforts and identify solutions to this complex issue.

We are working with the state of Rhode Island to advance economic opportunity for all as a result of the continued growth of the Blue Economy. Our work to engage community stakeholders and analyze the discreet opportunities have led to the development of [GrowBlue](#) and the designation of the [Ocean Tech Hub](#).

We work with over 40 clients each year — a majority are public agencies — on a range of initiatives and planning that allows us to research and experience a breadth of economic development and supporting sectors including housing, childcare, arts, culture and outdoor economy and program evaluation.

We welcome you to contact our References, included in Form B, for the following relevant projects:

Ramsey County: Economic Competitiveness and Inclusion Plan

Fourth Economy led a planning process that resulted in an award winning plan that focuses on eliminating economic disparities in Ramsey County, MN. Similar to the City of Madison, Ramsey County sought to identify barriers to generational wealth, how to increase the economic performance of the traded sector, and how to align workforce and economic development efforts for greater success.

Through resident and community leader engagement combined with original analysis, we were able to support the development of recommendations that compelled action while we were finishing the planning effort and which has been sustained since. [The full range of implementation impacts can be found here.](#)

York County Economic Alliance Economic Action Plan

Fourth Economy led the Economic Action Plan development process starting in 2019 with a pivot to support pandemic-relief efforts in 2020. Our flexibility and creativity in data analysis allowed us to define initial and potential pandemic-related impacts. This information helped direct action from City, County, and nonprofit leaders and lessened the impacts witnessed.

We continued to advance the [Economic Action Plan](#) work and successfully created a plan in 2020 that has been almost fully implemented. The plan highlighted the need for a deeper focus on support for minority businesses, opportunities for neighborhood investment, and strategies to grow the traded sector in the County. As a result of the plan's success, Fourth Economy has led follow-on projects including housing analysis and strategy development, outdoor recreation and cultural asset planning, and current work on equitable transportation analysis.

Regional Economic Development Inc. (REDI): Strategic Plan

In the fall of 2020, Fourth Economy worked with REDI to facilitate a strategic planning process for the organization and create economic growth in Columbia and Boone County, Missouri. Throughout the process, REDI and its partners considered what was needed to grow and maintain a successful regional economy. The resulting [3-year plan](#) outlined what REDI as an organization should be doing to address critical economic challenges and opportunities in Boone County.

In 2023, as their Strategic Plan entered its final year of implementation (2024), we were engaged to formally assess the plan's success to date and evaluate the thematic areas around which to focus the organization and its partners' efforts as it starts preparing for its next strategic plan (2025-2027).

The plan focussed on workforce development needs, minority business needs, anchor institution collaboration and more.

Research and Data Gathering, Data Analysis, and Narrative Creation

Fourth Economy will conduct economic research and data analysis to support key findings and narrative that will inform the creation of the City's economic development goals and strategies. Our analysis will address points of interest around wealth creation, retaining more dollars circulating in Madison's economy, placemaking, small business and industry support, workforce development, housing, transportation, and childcare.

The goal of our analysis will be to provide clear findings to drive decision-making and strategy by designing easily understandable slides, charts, and graphics to increase understanding and create a compelling and investable story. Additionally, Fourth Economy will work with staff to identify key metrics for measuring the effectiveness of recommended strategies in the years ahead.

Improving the creation of generational family wealth in Madison communities

DATA SOURCES

Fourth Economy intends to utilize the following data, supplementing with additional analysis as we hear from residents and community leaders:

- **Homeownership:** Disaggregated by race, ethnicity, family status. (US Census Bureau)
- **Housing cost-burden:** Rates disaggregated by race, ethnicity, household status. (US Census Bureau)
- **Educational completion:** Rates disaggregated by race, ethnicity, household status. (US Census Bureau)
- **Heirship:** Through a review of [Dane County Register of Deeds Office](#) and other information that may be available.
- **Health outcomes:** Such as health disparities, access to care, and life expectancy (US Census Bureau).
- **Social capital:** With measures such as community involvement, mentorship programs, and social networks. (US Census Bureau)
 - » **Overall Poverty:** A compass pointing towards household income, a pivotal factor influencing economic mobility.
 - » **Youth in Poverty:** To estimate the percentage of individuals below 18 living in poverty.
 - » **Foreign-born population:** To help identify needs for core services due to cultural, linguistic, and economic barriers.

ANALYSIS

Fourth Economy will assemble this data and conduct analysis to understand where there are significant issues that will require further investigation through additional analysis and resident engagement.

As noted, we will disaggregate by race, ethnicity, household status. We will identify trends, including where variables are interacting to support or act as barriers to building generational wealth. In similar engagements, our analysis has uncovered generational wealth issues including:

- Barriers due to the historic damages done by urban renewal (Ramsey County, MN);
- Loss of property due to issues related to heirship (Jacksonville, FL); and
- Limitations on small business creation and the ability to grow (York County, PA).

PRESENTATION

Fourth Economy will produce both descriptive narrative and slides that visually describe the existing conditions and where the opportunity for change or improvement are possible.

Retaining more dollars circulating in Madison's economy

DATA SOURCES

- **Consumer spending:** Data to track trends in retail sales across different sectors (e.g., grocery, dining, entertainment, etc.) to understand where residents are spending their money. (US Census Bureau)
- **Import and export data:** To understand the balance of trade for Madison, including the value of goods and services imported and exported. (U.S. Census Bureau Foreign Trade Statistics)
- **Banking and financial data:** Analyze trends in deposits and lending activity within Madison's banks and credit unions. This can indicate how money is flowing within the local economy. (FDIC)
- **Industry-specific data:** For key industries in Madison (e.g., technology, healthcare, education), gather data on their economic performance and contribution to the local economy. (ACS, local reports)
- **Tourism data:** Analyze spending patterns of tourists visiting Madison, including their length of stay, types of activities, and spending per day. (local reports)
- **Supply Chain Data:** To track purchasing patterns and commodity flows in Madison and broader regions. (US Census Bureau)
- **Purchasing Data:** To understand the role that anchor institutions, both public and private, are playing in the region and if there are opportunities for retaining additional value locally. (Survey)

ANALYSIS

Fourth Economy will assemble this data and analyze it to better understand the capital flows that currently are occurring in the City and region. In our recent work supporting the [Ocean](#)

[Tech Hub](#), we identified a significant amount of purchasing occurring outside of the region and some discrete opportunities for capture based on existing industry sectors.

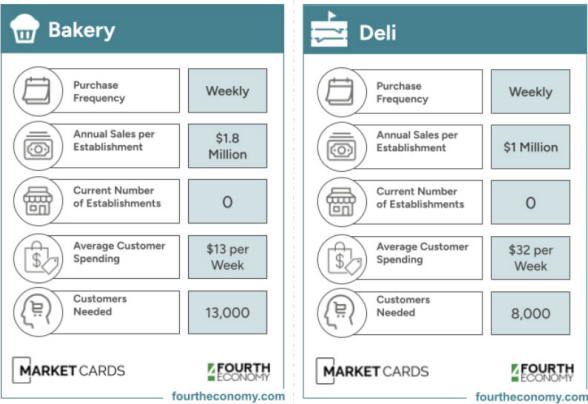
Our analysis will examine traded and non-traded sectors and assess the current “leakage” of dollars from the local economy. This will include the identification of supply chain opportunities and policies that are both encouraging and discouraging local purchasing. For example, in prior engagements we have identified the amount of funding being invested by economic development entities that supported the attraction of big-box retail and national chains at the direct detriment of main street businesses.

We expect that this analysis will uncover opportunities that will require different actions and we will work with the City to create a typology of these actions. For example, to keep more dollars circulating, we could envision actions that include: marketing/communications, strategic partnership formation, and/or investment to improve local strength as categories of recommendations. This will allow us to identify and describe the level of effort, who leads an effort, and the relative cost(s) to help in the decision-making process.

PRESENTATION

Fourth Economy will present this data in accessible ways through our use of charts, graphs, and descriptive language that allows stakeholders to readily understand the information.

As we engage the community, we will additionally utilize various tools designed to make informed decisions in a more interactive way. The use of Market Cards is one way that we work with communities to utilize our estimates of local purchasing power to make recommendations about what could be added in the community to retain those dollars.



How can we better leverage economic development work to build great places throughout the City

DATA SOURCES

Fourth Economy will work to disaggregate the previous data sources at the Census tract level to allow us to better understand the activities occurring within the Neighborhoods. In addition, we will seek to deploy a survey and partner with Madison’s Neighborhood and Community Centers, Neighborhood Associations, and Neighborhood Planning Councils to hear directly from residents and business owners throughout the community.

ANALYSIS

We will evaluate the impact of several place-based investments that the City of Madison has made such as the BRT development, research opportunities for additional investments and prioritize investments in public spaces, affordable housing, and sustainable transportation.

For the past six years, Fourth Economy has managed a Main Street (comparable to Neighborhood Business District) initiative for Allegheny County, Pennsylvania. This partnership has allowed us to support an ongoing set of Main Street areas in the county and provide planning and analysis, strategic planning, funding pursuit, and other services that enhance these districts.

As a result of this work and our broader portfolio, we fully recognize the importance of neighborhood amenities and services to create the quality of place that retains and attracts residents and investment. We will assess how to support equitable access to amenities and opportunities across all neighborhoods.

PRESENTATION

We will develop materials that are both internal and public-facing, describing the opportunities or needs of neighborhoods. We will also showcase reporting that clearly explains the importance of these types of actions as compared to more visible investments such as corporate expansions and attraction.



Supporting small business development and entrepreneurship

DATA SOURCES

Fourth Economy will collect small business data from a variety of existing sources as well as the survey described in the previous section. Some additional examples include:

- **County Business Patterns:** Provides data on the number of establishments, employment, and payroll by industry sector in Dane County. (Census)
- **Census Business Builder:** Allows for easy comparison of business trends.
- **Google Business Scrape:** Fourth Economy is utilizing the capture of google business data to allow us to create current business databases that allow us to map locations, segment by type of business, and create a record of contact information for additional surveying.

ANALYSIS

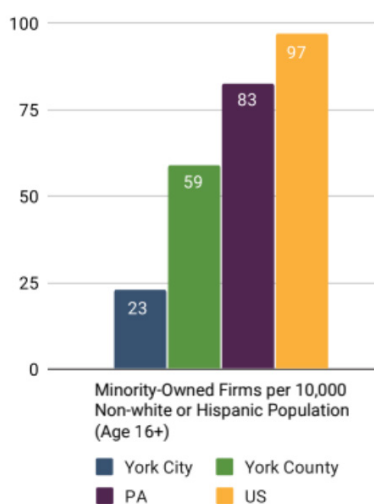
Fourth Economy will also create a profile of the small business ecosystem, including those programs and services designed to support business growth. We will interview the organizations in this sector to understand their focus, capacity and effectiveness and what they are seeing as recent and emerging trends.

The survey data will allow us to assess how these businesses are serving BIPOC residents through direct questions and an assessment of the neighborhood level experiences.

PRESENTATION

Fourth Economy will develop a presentation that describes the overall health of the small business and entrepreneurship sector and specific areas of strength and opportunity. The chart here was used to articulate the disparity in this community and led to the creation of a program ([BLOOM: Business Empowerment Center](#)) focused on minority business ownership. They recently noted "BLOOM has provided education taught by experts to over 750 entrepreneurs, awarded over \$480,000 in micro-grants, financed over \$600,000 in start-up and growth capital."

**MINORITY-OWNED FIRMS.
2012 (PAID EMPLOYEES)**



Non-white and Hispanic residents in the U.S. own businesses at 4.3 times the rate in York City, 1.6 times the rate in York County, and 1.2 times the rate in PA.

Source: (2012, Census Survey of Business Owners and Self-Employed Persons, SBO)

This information will clearly describe the role that a City can serve and other areas for public and private action to positively impact small business trends.

City support for larger, basic sector employers

DATA SOURCES

In addition to the County Business pattern data and information that we will develop from Lightcast, we will work with the City to identify a set of basic sector employers to engage as part of this planning process. These may be companies with facilities in the City and those outside that have significant numbers of employees working in the City.

Basic sector stakeholder engagement targets could include companies across industries such as technology, agriculture, and manufacturing, including:

Technology:

- » **Epic Systems:** A leading healthcare software company with a global reach, headquartered in Verona (just outside Madison). Their software is used by major hospitals and healthcare organizations worldwide.
- » **Exact Sciences:** A biotechnology company focused on early cancer detection and diagnostics, with a strong research and development presence in Madison.
- » **Several smaller tech companies and startups:** Madison has a growing tech sector with companies specializing in software, biotech, and other technology-driven fields.

Agriculture, Food, and Beverage:

- » **Dairy Farmers of Wisconsin:** A marketing and advocacy organization for Wisconsin's dairy industry, promoting and exporting dairy products nationally and internationally.
- » **Several food processing companies:** Companies involved in processing and distributing agricultural products, contributing to Wisconsin's strong food production sector.

Manufacturing:

- » **Sub-Zero Group, Inc.:** A high-end appliance manufacturer with headquarters and production facilities in Madison, exporting products globally.
- » **Trek Bicycle Corporation:** A major bicycle manufacturer with headquarters in Waterloo (near Madison), selling bikes worldwide.

Source: Fourth Economy, Information gathered from an AI language model (Gemini), October 1, 2024.

ANALYSIS

Through the data collection and validation with representatives of these basic sector employers, we will develop an assessment that demonstrates the current strengths, weaknesses, opportunities, and threats that the sector is dealing with.

We will engage basic sector employers in one or more Build Sessions (described below) that will allow us to identify possible strategies to support improved economic performance.

We will also look at opportunities for cross-sector collaboration. In past work we have identified opportunities for the adoption of automation to increase productivity and actually increase employment as well as opportunities to collaborate around training and development activities for new labor force entrants.

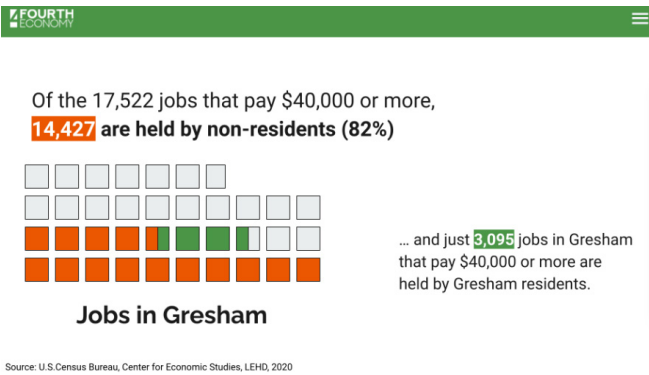
PRESENTATION

Fourth Economy will develop a presentation that shows the growth areas, what may happen based on identified scenarios and what areas the City can engage in to support the basic sector.

Other useful data analysis related to workforce development, housing, transportation, and childcare

DATA SOURCES

The Fourth Economy takes a holistic approach to its economic planning and what defines a place that is economically competitive and economically supportive of its residents. Our [Fourth Economy Community Index](#) (paused during the pandemic) illustrates this approach as we assessed communities across 20 indicators.



ANALYSIS

Fourth Economy also gets beyond the topline data to better understand local resident experiences. The image shown here demonstrates that while there are ‘good jobs’, in this City, the local residents are not benefiting from them. This type of information allows us to develop more responsive recommendations.

PRESENTATION

Fourth Economy will assemble a range of supportive data into a presentation that gets beyond the data point and into the ‘why’ the information is important for Madison to consider. The pandemic and resulting economy has exposed serious issues in the worker

support infrastructure including access to childcare, healthcare, safe and affordable housing, and transportation to work.

Measuring the effectiveness of recommended strategies in the years ahead

Fourth Economy will work with the City to identify opportunities to measure the effectiveness of the resulting recommendations and overall plan. We will provide a baseline set of data that can be used to measure progress. We will also provide a suggested timeline for each recommendation. For example, programs that focus on increasing generational wealth will require sustained efforts that may not show a true movement of the data needle for years or decades but there are ways to measure implementation steps in the interim.

Example of baseline metrics by focus area/

Goal Areas	Economic Indicators	Baseline	Year
Economy of the Future	Real GDP (Chained 2017 Dollars)	\$396,009,200,000	2022
	Real GDP Per Capita (Chained 2017 Dollars)	\$58,361	2022
	Annual Average Employment	3,203,166	2021
	Average Annual Earnings	\$64,891	2021
Entrepreneurship	New Establishment Creation	10,493	2020
	State Government R&D Expenditures	\$9,591,000	2020
	SBIR Awards	53	2021
	SBA 504 Loans Total	\$157,487,000	2022
Workforce and Talent	Bachelor's-Degree-or-Higher Attainment (Age 25+)	28%	2021
	Postsecondary Attainment (Age 25–64)	54%	2021
	Population without a High School Diploma (Age 25+)	476,815	2021
	Labor Force Participation Rate	63.6%	2023 (July)
Built Environment	Housing Starts, Units	28,547	2022
	Vacant and Available Units	2.6%	2021
	Households without Access to Broadband	12%	2021
	Roads in Poor Condition	23%	2021
	Renewable Energy Share of Total Electricity Net Generation	12%	2022
Amenities and Services	Share of Children Who May Need Care That Could Be Served through Existing Capacity (Capacity Sufficiency Rate)	61.2%	2022
	High-Quality Child Care Share of Total Capacity	46.4%	2022
	Mental Healthcare Health Professional Shortage Areas—Total Designations	102	2022
	Visitors (Person-Trips)	77,300,000	2021

Resident Engagement and Business Community Engagement

A community vision for an equitable economic future requires the input and eventual support of a wide range of stakeholders. The Fourth Economy team uses a unique human-centered approach to engaging stakeholders during our planning work. The focus of our engagement is to accomplish three goals that we think are critical for the implementation of a plan:

- **Engage** leaders throughout the process to allow them to build the knowledge base and confidence to move from ideas to action and to become champions for implementation.
- **Listen** to and engage with diverse voices in order to develop a holistic understanding and identify a shared vision.
- **Consistently report back and follow up** with participants of interviews, surveys, and focus groups to close the loop of engagement and provide opportunities for the public to check in with the project's process.

We aim to make the process of analysis exciting by engaging stakeholders in a way that gives them all a role to play in the creation of a better, more equitable future.

Outreach and Engagement Approach: We will fully develop an outreach and engagement approach best suited to meet the goals of the City of Madison, including the 'channels' that will provide the most effective for capturing information and the types of engagement such as:

- Interviews,
- Group listening sessions,
- Public events (existing and potential),
- Build Sessions, and
- Town Hall events.

The approach will be developed so that we hear from community members early in the process to guide our research and then again to react to the findings and possible strategies that may be advanced as recommendations.

Identify Stakeholders: We will work with leadership from the City of Madison and the Economic Development Committee to determine the most appropriate stakeholders to engage, but assume that it will include:

- **Economic Development Committee Members** to understand the history, culture, context, and an initial understanding of the focus areas around which the plan will be created
- **Business Leaders** to understand their lived experiences, expectations, opportunities, and challenges within the local ecosystem. These will include small businesses, larger businesses and real estate developers.
- **Economic Development Ecosystem Leaders** to hear their aspirations for the City of Madison and what role they play in supporting economic opportunity. The Madison Chamber of Commerce, Latino Chamber, workforce development orgs, childcare and other worker support organizations.
- **Public Sector Leaders** to understand existing strategies, tools, and mechanisms for support. This will include elected officials, administrative staff and others.
- **Community Leaders** who will be critical to the implementation of future strategies to support and accelerate the growth of the community. This will include Madison's assets in higher education, healthcare, and nonprofit organizations that serve neighborhoods..
- **Neighborhood Organizations** such as Madison's Neighborhood and Community Centers, Neighborhood Associations, and Neighborhood Planning Councils to hear directly from residents and business owners throughout the community
- **"Owners" of Previous Programs and Plans** understand what has already been implemented, what should be continued, and lessons learned from prior processes
- **Program Funders and Philanthropy** to understand current funding priorities, actively supported initiatives and the impact of investments made to date.

With each, we will define the level of participation we hope to achieve and the approach to engage them.

Engage Communities of Color and Historically Underrepresented Residents: Fourth Economy will work with the City and conduct independent research to identify potential stakeholders that represent communities of color and other historically underrepresented groups of residents. We will be mindful of identifying the trusted relationships that exist between leaders and communities and work to engage them in honest dialogue. Recognizing that participation by some individuals may be a burden, we will implement a stipend plan to support their participation.

Create a Stipend Plan: We place specific importance on grassroots knowledge and the perspective of lived experience within our community engagement work. We recognize that many residents may have a passion and sound ideas for helping to grow their economy and improve their quality of life. We also recognize that the expertise necessary to build strong and equitable economies must come in part from the members of a community who know it best. In order to remove barriers, we will develop a process for providing stipends for residents to support the planning activities. These 'plan ambassadors' will engage with us, providing outreach and communication support, as well as participate in Build Sessions as described in this scope.

Design a Communications Strategy: We will work with the City's communications team to support the development of content that continues to attract interest in the planning process, solicits ideas and reactions, and in general, creates a shared understanding of the work and findings.

Build Sessions: To develop actionable strategies and the plan framework, Fourth Economy uses a process called "Build Sessions." A Build Session is an interactive workshop to brainstorm, prioritize, and build solutions. Build Sessions emphasizes the focus on moving past talking about problems and toward co-creating solutions. This process engages the stakeholders who know the issues best and those who will likely be involved in supporting

the solutions. Engagement is critical to developing realistic solutions that have buy-in from key stakeholders.

Defining Roles: At its best, economic development is a team sport where various organizational players are working from a playbook that defines clear roles and expectations. Much like a team, though, economic development players can be out of sync, not as clear with their roles and expectations, injured from prior 'plays', and more. This environment creates confusion, frustration, and missed opportunities. While our work will be to directly support the City of Madison in defying the actions they can take and the impacts they can have, we will also define the roles needed and expectations of others in the economic development ecosystem. As the image here illustrates, we identified and organizations agreed to roles including Catalyst, Convener, and Champion around each of the strategy areas. We will work with you to identify a framework for this in Madison.



Coordination and Collaboration Between Services

The foundation of each of our engagements is strong project management. Through a bi-weekly check-in process, we ensure transparency of action and a collaborative thought process that allows for shared understanding. This check-in process will commence following a formal project kickoff meeting, in which we will review and refine the scope of work, ensure timeline alignment, and create space to discuss any emerging priorities, concerns, or points of dissonance.

Our bi-weekly check-in process will be supplemented with the use of collaborative tools for information sharing, and feedback will be utilized throughout the process, creating a continuous feedback loop between our team and our clients. While they are simple things, a rolling agenda that allows us to track decisions and responsibilities, a milestone check-in process, and collaborative documentation all ensure resilience in the planning process.

Our Project Manager and Director will ensure strong coordination between the engagement and analysis activities. We continually share findings as the process advances to test what we are 'hearing' against the data and vice versa.

We will provide a monthly update that includes process information (what's been accomplished and what's next) and what we are finding that can spark conversation. This will be in the form of charts/ graphs and narrative which will capture attention (e.g. 3 things we learned this month about Madison's employers).

We will then support the implementation of the economic development plan through monthly check-ins and, where needed, advisory services to unstick and, in general, advance the recommendations.





Appendix



Resumes



RICH OVERMOYER

PRESIDENT & CEO

✉ rich.overmoyer@fourtheconomy.com fourtheconomy.com/rich-overmoyer

EDUCATION

University of Pittsburgh

Graduate School of Public and
International Affairs

Pittsburgh, PA

M.A., Public Policy & Management

B.A., Political Science &

English Writing

PRIOR EXPERIENCE

GSP Consulting

Founder, Economic

Architecture Practice

Pittsburgh, PA

PA Department of Community and Economic Development

Deputy Secretary,

Technology Investment

Harrisburg, PA

PA Department of Community and Economic Development

Director, Office of Policy and

Technology Investment

Harrisburg, PA

AREAS OF EXPERTISE

- Community Development
- Community Engagement
- Comprehensive Economic Development Strategies
- Economic Development
- Entrepreneurship and Small Business Development
- Innovation-Based Economic Development
- Program Design and Implementation
- Public Policy
- Public-Private Partnership Development
- Strategic Planning

Since Fourth Economy's formation in 2010, Rich has been leading the charge to help clients translate complex ideas and data into solutions for their communities. With more than eighteen years of consulting experience, Rich has worked with a wide range of organizations, governments, and private sector leaders who are working to improve their communities and economies. He thrives amid challenges as well as evolving efforts that necessitate cross-system collaboration.

Prior to heading Fourth Economy, Rich utilized his strategic and entrepreneurial skills to create several successful public-private initiatives, including efforts to increase the evolution of manufacturing, foster a sustainable tourism sector, address workforce housing shortages, provide support for start-up companies, and help communities understand resilience risks. Throughout Rich's career, his work has won awards from national trade associations and more importantly made a significant impact in communities throughout the country.

SELECT PROJECT EXPERIENCE

ECONOMIC STRATEGY

- **Advancing Pennsylvania's Entrepreneurial and Innovation Economy** | Pennsylvania Department of Community & Economic Development | Project Manager
- **Assessment of Indiana's Manufacturing and Entrepreneurial Ecosystem** | Conexus, Indiana | Project Director
- **Benchmarking U.S. Regional Cities: A Study and Guide for Transformation** | The Central Indiana Corporate Partnership (CICP)/Indiana Economic Development Corporation (IEDC) | Project Manager
- **Black-Owned Business Support Ecosystem in Birmingham, AL** | Prosper | Project Director
- **Comprehensive Economic Development Strategy** | Evansville Regional Economic Partnership, IN | Project Director
- **Comprehensive Economic Development Strategy** | Indiana Economic Development Corporation | Project Director
- **Economic Competitiveness and Inclusion Vision Plan** | Ramsey County, MN | Project Director (IEDC Award of Excellence)
- **Economic Competitiveness Plan** | City of Chester, PA | Project Director
- **Economic Development Plan** | City of Scranton, PA | Project Director
- **Economic Development Plan** | County of Berks, PA | Project Director
- **Ocean Tech Market Analysis** | Rhode Island Commerce Corporation | Project Director

- **Economic Development Strategy** | York County Economic Alliance, PA | Project Director
- **Regional Green Building Product & Supply Chain** | Green Building Alliance, PA | Project Director

COMMUNITY DEVELOPMENT

- **Business Plan and Real Estate Analysis** | Neighborhood Allies, PA | Project Manager
- **Electric Mobility for All in the Pittsburgh Region** | Duquesne Light, PA | Project Director
- **Health Assessment and Improvement Planning** | Allegheny County Health Department Community, PA | Project Director
- **Housing Analysis** | Greater Newport Chamber of Commerce, RI | Project Manager
- **Housing Assessment** | York County Economic Alliance, PA | Project Director
- **Housing Program Analysis** | Indiana Association of Realtors | Project Director
- **Master Plan for Gwinnett County, GA Arts and Creative Economy** | Artworks Gwinnett | Project Director
- **One Macon! Strategic Plan** | Community Foundation of Central Georgia | Project Manager
- **Opportunity Assessment & Delivery** | Rose-Hulman Institute of Technology, IN | Project Director
- **Outdoor & Cultural Assets Impact Analysis** | York County Economic Alliance and York Cultural Alliance, PA | Project Director
- **Vibrant and Connected Places Dashboard** | Community Foundation of the Chattahoochee Valley, GA | Project Manager
West Virginia's Agricultural Economy Strategy | West Virginia University | Project Director

ORGANIZATIONAL AND INITIATIVE DEVELOPMENT

- **Central New York Green Chips Community Investment Fund Community Priorities Analysis** | CenterState CEO | Project Director
- **Climate Action Equitable Strategy Implementation** | Pennsylvania Department of Environmental Protection (DEP) | Project Director
- **Community Prosperity Impact Analysis** | Van Beuren Charitable Foundation, RI | Project Manager
- **COVID-19 Response Support** | Team PA | Project Manager
- **IU College & Community Collaboration Support** | Indiana University | Project Director
- **Outdoor Recreation Economy Roadmap** | Maine Outdoor Brands Maine | Project Director
- **Promising Practices and Research Profiles** | University of Rhode Island Research Foundation | Project Manager
- **Strategic Plan** | Conexus, Indiana | Project Manager
- **Strategic Plan** | Huntington Regional Chamber of Commerce, WV | Project Manager
- **Parks, Trails, and Green Design Evaluation** | Ralph C. Wilson Foundation, MI | Advisor



EVE CRITTON

SENIOR CONSULTANT

✉ eve.critton@fourtheconomy.com

🖱 fourtheconomy.com/eve-critton

EDUCATION

Columbia University School of International and Public Affairs
New York, NY
Masters of Public Administration

Occidental College
Los Angeles, CA
Bachelor of Arts

PRIOR EXPERIENCE

James Lima Planning + Development (JLPD)
Senior Analyst
New York, NY

Project for Public Spaces
Program Consultant
New York, NY

Pershing Square Renew
Manager of Development and Public Affairs
Los Angeles, CA

AREAS OF EXPERTISE

- Community Development
- Community Engagement
- Diversity, Equity, and Inclusion Strategy Implementation
- Governance and Stewardship
- Outdoor Recreation Economy
- Place-Based Organizations Support
- Placemaking
- Public Realm Strategies
- Public-Private Partnership Development
- Strategic Planning

Eve works at the nexus of the public realm, sustainable economic development, and equitable solutions to persistent problems. This translates into work that helps people understand, advocate for, and improve their communities. Her portfolio emphasizes the softer side of economic development, examining strategic policy, programming, initiatives, and funding to create economic opportunity for all.

Eve leads projects across the country, from the statewide Comprehensive Economic Development Strategy for Indiana to the housing and economic development portions of the Unified Plan for a county near Atlanta, Georgia. Her economic development work prioritizes access to critical amenities, services, and infrastructure alongside quality of life and place improvements. Eve also helps organizations expand their capacity and impact through creative programming, development, partnership building, and strategic planning, such as the Blue Ridge Parkway Foundation and the Humane Animal Rescue of Pittsburgh. Eve enjoys helping her clients and their communities grow and prosper.

SELECT PROJECT EXPERIENCE

- **Comprehensive Economic Development Strategy** | Indiana Economic Development Corporation | Project Manager
- **Economic Development Plan** | City of Atlantic City, NJ | Project Manager
- **Greater Pittsburgh Outdoor Economy Analysis** | Pennsylvania Environmental Council (PEC) | Engagement Support
- **Humane Health Coalition Business Plan** | Humane Animal Rescue of Pittsburgh, PA | Engagement Lead
- **Hunt Armory Feasibility Study** | Pittsburgh Penguins Foundation, PA | Project Manager
- **Opportunity Assessment & Delivery** | Rose-Hulman Institute of Technology, IN | Project Manager
- **Regional Tourism Plan** | Blue Ridge Parkway Foundation, VA | Project Manager
- **Rhode Island Blue Economy Technology Cluster Development** | URI Research Foundation | Project Coordinator
- **Strategic Plan Update** | Friends of Mammoth Cave, KY | Project Support
- **Unified Plan** | Gwinnett County, GA | Project Manager
- **Workforce Housing Pilot Facilitation and Coaching** | WHEDA, WI | Engagement Support



DENIQUE “NEEKY” DENNIS

SENIOR CONSULTANT

✉ neeky.dennis@fourtheconomy.com

🖱 fourtheconomy.com/neeky-dennis

AREAS OF EXPERTISE

- Community Development
- Community Engagement
- Diversity, Equity, and Inclusion Strategy Implementation
- Economic and Social Justice
- Place-Based Organizations Support
- Program Design and Implementation
- Project Management
- Public-Private Partnership Development
- Qualitative Research
- Strategic Planning

PRIOR EXPERIENCE

Tallawah Innovations

Chief Impact Strategist
Ocho Rios, Jamaica

Sangfroid Strategy

Social Impact Strategist
Cleveland, OH

EDUCATION

University of Kentucky

Lexington, KY
Doctorate in Social Work (DSW)
Spring 2027 Anticipated

Case Western Reserve University

Cleveland, OH
M.S. Social Administration

Defiance College

Defiance, OH
B.S. Social Work

Denique “Neeky” Dennis has an unwavering commitment to fostering equitable, inclusive, and vital communities. Her most notable professional pursuits have been in the areas of violence prevention/intervention, collective impact facilitation, and asset-based community development. She especially enjoys fostering the collective efficacy and franchise of communities to envision, co-create, and sustain development efforts. To accomplish this, she takes an appreciative inquiry approach which recognizes and includes members of both formal and informal sectors. She encourages innovation and transformation by leaning into the “what ifs” and “why nots”, and champions inclusion by constantly questioning whose interest is or is not represented at decision-making tables.

SELECT PROJECT EXPERIENCE

- **EB-5 Immigrant Investor Program Economic Impact Study** | Invest in the USA (IIUSA) | Project Coordinator
- **Economic Impact Report** | Neighborhood Allies, PA | Engagement Lead
- **Housing Strategy** | City of Lorain, OH | Engagement Lead
- **Impediments to Fair Housing** | City of Lorain, OH | Engagement Lead
- **Strategic Organization Plan: Economic Development** | Park Central Development Corporation, MO | Engagement Lead
- **Strategic Plan & Economic and Market Analysis** | Anne Arundel County, MD | Engagement Lead
- **Trails Evaluation** | Ralph C. Wilson Foundation | Research Support



OSHANE MCRAE

CONSULTANT



oshane.mcrae@fourtheconomy.com



fourtheconomy.com/oshane-mcrae

EDUCATION

University of Texas at Austin

McCombs School of Business
Austin, TX

M.B.A., Social Impact and
Entrepreneurship

George Washington University

Milken Institute of Public Health
Washington, D.C.

M.P.H., Environmental Health
Science & Policy

Vanderbilt University

Nashville, TN

B.A. Public Policy Studies

PRIOR EXPERIENCE

CapEQ Impact

Social Impact Fellow
Austin, TX

Center for American Progress

Campaign Associate, Gun
Violence Prevention
Washington, D.C.

Capital Impact Partners

Programs Intern
Detroit, MI

AREAS OF EXPERTISE

- Design Thinking
- Diversity, Equity and Inclusion
Strategy Implementation
- Economic and Social Justice
- Entrepreneurship and Small
Business Development
- Health Equity
- Innovation-Based
Economic Development
- Public Policy
- Social Enterprise and
Impact Investing

Oshane is a cross-disciplinary strategist with a passion for supporting underinvested in people & communities to achieve their full potential. He focuses primarily on developing the capacity of small businesses as economic engines & anchors and infusing concepts of environmental sustainability into community development.

Raised in the Bronx, NY, he deeply understands how the availability of resources impacts a community's ability to invest in itself and grow, and as a result finds it critical to get flexible & patient forms of resources to communities and places long overdue for investment. He specializes in root cause analysis and works with people of all backgrounds to co-create long term, equitable and paradigm shifting solutions that align with their visions and the outcomes they want to see.

FOURTH ECONOMY PROJECT EXPERIENCE

- **Central New York Green Chips Community Investment Fund Community Priorities Analysis**, CenterState CEO, Engagement Support
- **Comprehensive Economic Development Strategy (CEDS)**, Evansville Regional Economic Partnership), Engagement Lead
- **EB-5 Immigrant Investor Program Economic Impact Study | Invest in the USA (IIUSA) | Project Support**
- **Ocean Tech Market Analysis** | Rhode Island Commerce Corporation | Analysis Support
- **Regional Green Building Product and Promising Practices and Research Profiles**, University of Rhode Island Research Foundation, Project Support
- **Strategic Organization Plan: Economic Development** | Park Central Development Corporation, MO | Project Support
- **Supply Chain Support**, Green Building Alliance, Engagement and Research Support
- **Transportation Equity Study** | United Way of York County, PA | Engagement Lead



ANNE JENSEN

CONSULTANT



anne.jensen@fourtheconomy.com



fourtheconomy.com/anne-jensen

EDUCATION

Carnegie Mellon University

H. John Heinz III College of
Information Systems and
Public Policy
Pittsburgh, PA
M.S., Public Policy and
Management

University of Virginia

Charlottesville, VA
B.A., American Studies,
Concentration in Race & Ethnicity
B.A., Sociology

PRIOR EXPERIENCE

Carnegie Mellon University | EY
Research Assistant in Zero Waste
Manufacturing
Pittsburgh, PA

Center for African American Urban Studies & The Economy (CAUSE)

Research Assistant
Pittsburgh, PA

Tube City Renaissance Housing & Community Development

AmeriCorps VISTA
McKeesport, PA

AREAS OF EXPERTISE

- Community Development
- Community Engagement
- Data Analysis and Visualization
- Diversity, Equity, and Inclusion Strategy Implementation
- Economic Development
- GIS Mapping
- Project Management
- Qualitative Research
- Racial Disparity Analysis

Anne combines her research and analysis skills into actionable, elegant solutions for communities looking toward an equitable, resilient future. She especially thrives while working closely with communities to develop their vision of a stronger economy, and she uses qualitative and quantitative data to meet the day-to-day challenges of economic development work. Anne has worked closely on projects related to economic development, housing development, and community resilience in her tenure at Fourth Economy.

SELECT PROJECT EXPERIENCE

- **Allegheny County Economic Development** | Allegheny Together Program Technical Assistance, PA | Project Support
- **Catalyzing Economic Prosperity in Louisiana** | Louisiana Workers Compensation Corporation Foundation | Analysis Support
- **Central New York Green Chips Community Investment Fund Community Priorities Analysis** | CenterState CEO | Analysis Support
- **Comprehensive Plan** | City of Brookhaven, GA | Analysis Lead
- **Connect Greater Newport** | Greater Newport Chamber of Commerce, RI | Analysis Support
- **Craft-Beer, Wine & Brewery Industries Impact Analysis** | Iowa Economic Development Authority | Analysis Lead
- **EB-5 Immigrant Investor Program Economic Impact Study | Invest in the USA (IIUSA)** | Analysis Support
- **Economic and Workforce Impacts of Electric Vehicles** | Jobs for the Future | Analysis Support
- **Economic Development Plan** | City of Atlantic City, NJ | Analysis Support
- **Economic Mobility Analysis** | City of Gresham, OR | Analysis Lead
- **Economic Mobility Analysis** | City of Nashua, NH | Analysis Lead
- **Housing Analysis** | Red River Community Housing Development Organization, ND | Analysis Support
- **Housing Strategy** | City of Lorain, OH | Engagement Lead
- **Housing Assessment** | York County Economic Alliance, PA | Analysis Support
- **Humane Health Coalition Business Plan** | Humane Animal Rescue of Pittsburgh, PA | Analysis Support
- **Hunt Armory Feasibility Study** | Pittsburgh Penguins Foundation, PA | Analysis Support
- **Impediments to Fair Housing** | City of Lorain, OH | Engagement Lead
- **IU College & Community Collaboration Support** | Indiana University | Project Support
- **Economic Impact Analysis** | Newport Festivals Foundation, RI | Analysis Lead
- **Strategic Plan & Economic and Market Analysis** | Anne Arundel County, MD | Analysis Lead
- **Strategic Plan** | Humane Animal Rescue of Pittsburgh, PA | Analysis Support
- **Transportation Equity Study** | United Way of York County, PA | Analysis Lead



Forms



Form A: Price Proposal and Signature Affidavit

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

SIGNATURE AFFIDAVIT

Proposer's Certification:

By submitting this proposal, we certify that:

- This entire proposal, including the Price Proposal, has been developed independently and not in collusion with other proposers or anyone competing for the award of this RFP.
- We have not knowingly disclosed the contents of this proposal to any other proposer, anyone competing for the award of this RFP.
- We have not taken any action that would interfere with free competition on this RFP.
- We have not violated any laws in the submission of this proposal or participation this RFP.
- All information in this proposal is true and accurate to the best of our knowledge.

Agreement to comply with all terms of RFP: By submitting this proposal, we agree to comply with all of the terms, conditions, and specifications of this RFP, the sample contract, and any contract awarded under this RFP.

Fourth Economy Consulting, Inc.

COMPANY NAME

SIGNATURE

10/09/2024

DATE

Rich Overmoyer

NAME OF PERSON SIGNING

President and CEO

TITLE OF PERSON SIGNING



Form B: References

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

This form must be returned with your response.

Please list three references that are **NOT** from the City of Madison. If you wish to highlight any additional work experience for the City of Madison, please list it on a separate page.

REFERENCE #1 – CLIENT INFORMATION	
ORGANIZATION/COMPANY NAME Ramsey County Community & Economic Development	PROJECT MANAGER Kari Collins
TELEPHONE NUMBER 651.302.4455	EMAIL kari.collins@ramseycounty.us
PROJECT START DATE Dec 2019	PROJECT END DATE Mar 2021
PROJECT DESCRIPTION We led the overall Economic Competitiveness and Inclusion Vision Plan development and helped facilitate a holistic approach to addressing the community's opportunities and challenges. The plan was adopted in 2021, and the Ramsey County team immediately began to implement the recommendations. Over \$75M has been committed to affordable and workforce housing development, a \$5M business real estate preservation fund was created and several more recommendations have been implemented.	

REFERENCE #2 – CLIENT INFORMATION	
ORGANIZATION/COMPANY NAME York County Economic Alliance	PROJECT MANAGER Silas Chamberlin
TELEPHONE NUMBER (717) 848-4000	EMAIL SChamberlin@yceapa.org
PROJECT START DATE Nov 2019	PROJECT END DATE Oct 2020
PROJECT DESCRIPTION Fourth Economy and YCEA collaborated to create a five year Economic Action Plan that would guide investments in York County through 2025. In March 2020, as the local economic impacts of the global pandemic set in, we pivoted to develop an assessment of impacts to the local economy to support the community's economic response and recovery actions, developing a short term recovery plan in addition to the resilience-focused 5-year strategy.	

REFERENCE #3 – CLIENT INFORMATION	
ORGANIZATION/COMPANY NAME Regional Economic Development, Inc (REDI)	PROJECT MANAGER Stacey Button, CEcD
TELEPHONE NUMBER 573.442.8303	EMAIL Stacey.Button@como.gov
PROJECT START DATE Project 1: Oct 2020; Project 2: Oct 2023	PROJECT END DATE Project 1: Jun 2021; Project 2: Jan 2024
PROJECT DESCRIPTION REDI is the economic development organization for Columbia and Boone County, Missouri. REDI partnered with Fourth Economy to develop a three-year Strategic Plan to enhance its mission to promote the vitality of local businesses and increase the number of quality, sustainable jobs. Our process included in-depth data analysis; a review of prior plans; interviews; build sessions; and working meetings.	



Form C: Vendor Profile

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

This form must be returned with your response.

COMPANY INFORMATION

COMPANY NAME (Make sure to use your complete, legal company name.) Fourth Economy Consulting, Inc.			
FEIN 27-3315671		(If FEIN is not applicable, SSN collected upon award)	
CONTACT NAME (Able to answer questions about proposal.) Rich Overmoyer		TITLE President and CEO	
TELEPHONE NUMBER 412.251.1607		EMAIL rich.overmoyer@fourtheconomy.com	
ADDRESS P.O. Box 81620		CITY Pittsburgh	STATE PA
		ZIP 15217	

AFFIRMATIVE ACTION CONTACT

If the selected contractor employs 15 or more employees and does aggregate annual business with the City of \$50,000 or more, the contractor will be required to file an Affirmative Action Plan and comply with the City of Madison Affirmative Action Ordinance, Section 39.02(9)(e), within thirty (30) days contract signature. Vendors who believe they are exempt based on number of employees or annual aggregate business must file a request for exemption. Link to information and applicable forms:

<https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/vendors-suppliers>

CONTACT NAME Pia Bernardini		TITLE Vice President Operations	
TELEPHONE NUMBER 412-325-2457		EMAIL pia.bernardini@fourtheconomy.com	
ADDRESS P.O. Box 81620		CITY Pittsburgh	STATE PA
		ZIP 15217	

ORDERS/BILLING CONTACT

Address where City purchase orders/contracts are to be mailed and person the department contacts concerning orders and billing.

CONTACT NAME Pia Bernardini		TITLE Vice President Operations	
TELEPHONE NUMBER 412-325-2457		EMAIL pia.bernardini@fourtheconomy.com	
ADDRESS P.O. Box 81620		CITY Pittsburgh	STATE PA
		ZIP 15217	

LOCAL VENDOR STATUS

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website.

<https://www.cityofmadison.com/finance/purchasing/local-businesses/register-business/>

CHECK ONLY ONE:

☐ **Yes**, we are a local vendor **and** have registered on the City of Madison website under the following category: _____

☒ **No**, we are not a local vendor or have not registered.

6.1 Proposal Checklist

Required Documents to Submit:		
Response to question in Section 5.7		X
Required Forms to Submit:		
Form A: Price Proposal and Signature Affidavit		X
Form B: References		X
Form C: Vendor Profile		X
RFP ADDENDUM Check the bid websites for any addendum. See Section 3.1 . <ul style="list-style-type: none"> You can use the area below to track addendums. An addendum might require you to submit additional documents. Make sure to read it carefully and send any additional documents. 		
Addendum # (if any)	Have you read it?	Have you submitted any documents required by the addendum?
Addendum # <u> 1 </u>	X	X
Addendum # <u> 2 </u>	X	X



PO Box 81620
Pittsburgh, PA 15217
engage@fourtheconomy.com
www.fourtheconomy.com



City of Madison EDD Proposal
RFP #: 13077-0-2024-BP

Engagement Services Only

Required Documents to Submit:

- ☐ Response to question in Section 5.7
- (pages 4-14)

Required Forms to Submit:

- ☐ Form A: Price Proposal and Signature Affidavit
- (pages 15-16)
- ☐ Form B: References
- (pages 17-18)
- ☐ Form C: Vendor Profile
- (pages 19-20)

RFP ADDENDUM

Check the bid websites for any addendum. See Section 3.1.

Addendum # (if any)	Have you read it?
<input type="checkbox"/> Addendum #1 - 13077	<input type="checkbox"/> Yes
<input type="checkbox"/> Addendum #2 - 13077	<input type="checkbox"/> Yes

Statement of Interest

EQT By Design is pleased to submit our response for the City of Madison Community Economic Development's (City EDD) request for Economic Development Plan Consulting Services. Specifically, EQT By Design is interested in offering **Engagement Only** services to complement and support the data, research, and analysis services being sought for as well.

We will be sure to support the intersection of residential, business, and organizational voicing around small, large, commercial and entrepreneurial businesses with racial, ethnic, cultural, and accessibility needs as part of the overall engagement strategy and design process.

Following are our qualifications and our proposal for engagement services. We seek to share what is learned through engagement and leverage that learning to build upon proactive shifts by the City EDD Connect Madison plan. Further, we are thrilled to offer and support additional adaptation and adoption of engagement expressed goals, strategies and policies by key stakeholders that will positively shift forward the city's community and economic development planning efforts for the next 5 years!

Questions 1 - Firm Background

EQT brings 25+ years of experience in equity-centered community engagement, strategic planning, change management, and organizational cultural design within government, community, and the corporate and nonprofit sectors. Their strength lies in using a design-thinking approach to ensure the following: (1) embed diversity, equity and inclusion at its core; (2) help organizations center the ideas and perspectives of their diverse customers, constituencies and communities while also (3) building and embedding sustainable systems change strategies that matter and last.

Philosophy + Methods

Connecting and bridging perspectives made up of racially, ethnically, and linguistically diverse community members, as well as other intersectionalities, is at the heart of EQT's work. Our process and design are multifaceted and deeply rooted in equitable public engagement. We bring together both underserved and easily served groups, adopting a "both/and" vision and approach to ensure inclusivity of all voices, views, and perspectives. EQT has supported communities and organizations from a variety of industries and sectors in developing engagement strategies centered around equity and inclusion over the last seven (7) years and they are proud of the impact made!

EQT's methods of engagement are based on the RESJ+B model*, employing an equity lens strategy to gather diverse perspectives from those who are typically challenging to engage, involve, or include, particularly in public policy, community, and economic development initiatives. Our strategy focuses on the following: (1) intentionally slowing down the process, (2) creating space, and (3) building bridges for informed and engaged participation. We also connect with key grassroots networks and relationships to help ensure we are applying inclusive and equitable as well as sustainable programmatic and policy analysis to our efforts.

In addition, we seek to ensure equity, diversity, and belonging is centered in all its projects and processes. EQT does this by applying an equity lens to transformative practices across systems, policies, programs, and professional development. Our work seeks to implement a design and a framework that includes practices that amplify a systems change approach throughout all steps of system and social change within an engagement process.

Questions 1 - Firm Staff

ANNETTE MILLER

Founder + CEO | Chief Engagement Consultant EQT By Design



Annette Miller has lived in Madison since 1989 with her life partner, Mike, and three children they have raised together. Annette's career spans decision-making roles across state and local government and as an executive in the private sector. She brings 25 years of strong professional policy, racial equity, and analytic skills, and a wide network of community, government, and business relationships, especially with Dane County's diverse populations. Annette launched EQT By Design (EQT) in 2017 to focus on developing diverse, inclusive, sustainable strategies in public engagement, equitable community development projects, and organizational cultural change management.

As CEO and founder of EQT, Miller's passion is ensuring that inclusion and engagement are front and center in her work. EQT does this work by engaging the community in equity centered efforts, disrupting and changing inequitable policies, systems, and structures, while consulting and modeling, to provide concrete action steps to increase economic and community impact and decision making for Black, Indigenous and People of Color.

EDUCATION / CERTIFICATION

- Master of Science, Social Innovation & Sustainability Leadership | Edgewood College
- Bachelor of Arts, English | University of Wisconsin-Madison
- Anima Deep Diversity certification
- International Association of Public Participation (IAP2) certification

Annette has more than 20+ years of experience in policy, planning, and community engagement and facilitation in Dane County, including experience leading the Mayor's Staff at the City of Madison and as Emerging Markets Development Director for MGE. Annette is widely-recognized for her commitment to meaningful public participation, with an emphasis on inclusivity, listening, engendering trust, and capacity and wealth building for broad-based community and economic impact and inclusion by Black, Indigenous and People of Color.

MATHIAS LEMOS CASTILLO

**Engagement Partnerships Consultant
EQT By Design**

Mathias Lemos Castillo joined the EQT by Design Team in February 2022. Before joining the team, Mathias, worked with numerous organizations alongside the Local Voices Network as their Partner Engagement Manager & Spanish Conversation Lead. Mathias has a strong passion for group facilitation, social justice, community service and has been a prominent voice within the Madison community on issues around immigration and public policy. Mathias brings a strong community oriented background to his work and has knowledge on how to engage people, communities, and entities both locally and nationally. Mathias prides himself in making sure key players are well aligned in his work.

EDUCATION / CERTIFICATION

- Bachelor of Science, Sociology and Political Science, Minor in Spanish | Edgewood College
- Alpha UMi 5G Leadership Certification

SELECTED EXPERIENCE**EQT By Design | 2022 - Present**

Community networking, recruitment + reach, Engagement best practices + design strategies, Translation (Spanish, English), equity-lens data, analysis, and theming, facilitation.

Latino Professionals Association of Greater Madison (LPA) Board Member | 2018 - Present

Mathias has been a board member of the Latino Professionals Association since he graduated from Edgewood College. As a board member, Mathias has expanded the programming provided to younger professionals starting in high school and ensuring there is a pipeline of professional Latinx mentorships in the greater Madison area. Currently serving as Secretary and Chair of the Career and Leadership Development committee. Mathias is working with local Madison leaders to ensure Latinx professionals in Madison are equipped with the right tools and resources to advance in their professional careers.

Cortico | 2019 - 2022

Recruited, retained, and effectively utilized volunteers to carry out program components using train-the-trainer practices to expand programs offered. Staffed appropriate committees and all subcommittees locally and nationally to assure completion of programs, plans and activities.

Establish and maintain relationships with community agencies, educational systems and government entities to enhance Cortico's programs both in English and Spanish. Worked along

with the Director of Partnerships and Director of Capacity Building to maintain relationships with new and returning partners and created SOW/PA documents for project management along with onboarding facilitators from the various partner organizations.

Matthew Braunginn | Communications + Policy Consultant



Matthew Braunginn is native Madisonian. He is an experienced policy and community development analyst with a demonstrated history of working in the “Think Tank” industry. He has strong professional skills in policy research and writing, and is knowledgeable in racial and economic equity, climate change, and city infrastructure. Matthew is a graduate of Purdue University with a BA in Political Science.

KEY HIGHLIGHTS

- Board Member and Diversity Co-chair of New Leaders Council
- Regular contributor to Madison365 on race and community-related politics
- Co-Founder and Organizer of Young, Gifted and Black

Naman Siad | Project Coordinator Consultant



Naman Siad is a longtime Madison resident and community member. She was a graduate of University of Wisconsin-Law School and received her L.L.M Human Rights, Conflict, and Justice from SOAS University of London.

Naman has worked in various practice areas from immigration and civil rights to non-profit compliance work. Additionally, Naman served as a consultant with Empathy 4 Equity, specializing in diversity, equity, and empathy training for organizations and businesses. Naman is passionate about social justice, equity, community engagement, and uplifting marginalized voices.

EDUCATION/CERTIFICATION

- L.L.M., Human Rights, Conflict, and Justice, SOAS University, London (2020)
- J.D., University of Wisconsin Law (2019)
- B.S., University of Wisconsin-Madison (2015)
- Wisconsin Bar Admission

Question 2 - Firm Experience and Technical Capacity

EQT By Design is a certified minority and woman owned business based in Madison, Wisconsin and to date collaborates with seven creative and bright members who represent and reflect a broad multicultural, ethnic, and linguistic set of identities and thinking from the greater Madison area to support the work of EQT.

Main contact: Annette Miller annette@eqtbydesign.com

Our methods of engagement are based on a strategy that is diverse by design and we seek perspectives from those who are difficult to engage, involve, or bring along, particularly on topics of public policy and community and economic development initiatives. We bridge those voices between those often not heard with those who heard and engaged most often; and seek to strike a balance. The ultimate goal is to lift up what is learned by all and connect that with the values and principles of the engagement strategy.

Further, we seek to explore and design practices and processes to slow down to inform and engage grassroots networks and relationships curated over the years to connect with diverse community members, and apply an inclusive and equitable policy analysis to the efforts. EQT's team is able to leverage the individual careers of the team and thereby lifting up connections and relationships that cover private, public and non-profit, and community-based sectors of formal, informal, traditional and nontraditional businesses, entrepreneurs including community and residential members in the greater Madison and Dane County area. Our relationships also are made up of and include organizations, communities and neighborhoods that reflect the city's broad and diverse racial, ethnic, linguistic community both historical and new to this area given the long standing work and history of our team.

Moreover, our strategy and framework for this project will be designed to collect input from a cross-section of stakeholders representing varying diverse backgrounds while ensuring we also incorporate **any existing data** provided by our client and consultant partners and our residential and business community that may also be relevant sources for this process. Specifically, engagement data from community based organizations like Centro Hispano, Urban League and business organizations like the Black, Hispanic/Latino, and Hmong Chambers along with the Greater Madison to ensure we lift what has been learned and bridge it into what more there is to discover and include.

Engagement tools and strategies will be amplified to engage, inform, and collaborate in ways that sustain the voices of the community; from a belonging as well as representation our work is designed to affirm and confirm engagement, awareness, and stakeholder influence in the lifting up of ideas, goals and strategies that will help inform the 2024-2026 City of Madison Economic Development Plan (CMEDP).

Recent examples of EQT's leadership in providing public participation strategic advising include John Nolen Drive, Complete Green Streets, Lake Monona Waterfront, UW Madison Library Mall, MMSD Southside Elementary School, Oscar Mayer Redevelopment Plan, City of Madison Voice of the Customer, and Imagine Madison. During each project, EQT designed and implemented a community engagement strategy centered around engaging underrepresented populations for each entity's comprehensive planning process. Our approach seeks to bridge all voices of representation and inclusion in the engagement process. We apply an equity lens to ensure solutions come from multicultural and diverse perspectives while also balancing voices and perspectives that traditionally have been heard.

Question 3 - Research and Data Gathering, Data Analysis, and Narrative Creation

EQT is interested and excited to apply the questions below as part of the engagement design to support the data gathering strategies asked for in this RFP. Though we are not submitting for this segment our work of engagement will support it.

RFP Points of Interest Under Research and Data Gathering

1. Improve the creation of generational family wealth in our communities
2. Keep more dollars circulating in our local economy
3. Leverage economic development work to build great places throughout the City
4. Support small business development and entrepreneurship
5. Support larger, basic sector employers
6. Data analysis related to workforce development, housing, transportation, and childcare
7. Metrics on effectiveness recommended strategies in the years ahead

Some strategies for consideration are to break up these important key areas of data interest amongst the engagement tools we would apply. Specifically, how do we use the **survey tool** to answer questions about keeping dollars in the local economy, building up the city, workforce development, housing, transportation, and childcare? Which we believe are ideal for a survey strategy to the general community.

For **focus groups**, questions on generational wealth, small business ownership, entrepreneurship and large sector employers seem better suited for that approach. This also allows the opportunity to ask those small groups about any engagement or analysis they have done on any of those topics as well. Particularly since we don't want to ask questions already asked in previous engagement and/or work plans.

Part of our engagement design also includes an external **stakeholder advisory group**. Below we have provided a sample list of the types of stakeholders who could inform and champion the process. A stakeholder advisory group of knowledge experts can improve and give support to the data collection process design.

Sample listing of prospective stakeholders for Advisory Group

1. Small Business Owner - Local retail shop or restaurant proprietor
2. Large Employer Representative - HR Director or CEO of a major company in Madison
3. Community Leader - Director of a neighborhood association or community center
4. Financial Institution Representative - Local bank manager or credit union executive
5. Childcare Provider - Owner of a daycare center or early childhood education specialist
6. Education Sector Representative - University dean or school district administrator
7. Workforce Development Professional - Director of a job training program
8. Technology Sector Representative - Startup founder or tech company executive

Our engagement process will be documented and shared with the data gathering consultant identified for this RFP. We will summarize and develop both quantitative and qualitative themes and other information gathered to ensure the data research partner hired along with our client partner can deepen their understanding of how to ensure community and stakeholder input is embedded into a sustainable planning and implementation protocol.

Questions 4 - Resident Engagement and Business Community Engagement

EQT By Design brings extensive strategic advising experience and uses a design-thinking approach that embeds diversity, equity and inclusion at its core. As such, we will work closely with the client to ensure our general and targeted engagement strategies and approaches are reflective of the communities and stakeholders most impacted by the City's economic development plan.

Our strategy and framework for this project will be designed to collect input from a cross-section of stakeholders (large and small businesses, institutions, developers, and community-based organizations and nonprofits) that also represent and are inclusive of diverse backgrounds connected to race, age, culture, ability, and gender identity. Our engagement efforts will be community-driven, equity-centered, and will incorporate any existing data provided by our client partners while also ensuring we incorporate additional relevant sources from key stakeholders.

The following approaches and tools will affirm and confirm community engagement participation, generate awareness, and gain stakeholder insight and influence into the City's economic development plan for the next five years. While also seeking to share out and balance the needs of ALL engaged and impacted by the economic planning vision for the City.

TOOLS:

One (1) Survey (paper and online) - A survey to gather input from the general community to help inform the goals of the client partner and the deliverables of the engagement process. This survey will also seek to identify important economic development values, principles or goals that should be used to help inform the final plan.

Two (2) Public Workshops - where small and large key business stakeholder community members can share feedback on the work before and after strategy development. These public workshops will be designed to be an interactive experience where we seek to affirm (before strategy development) and confirm (after strategy development) what was learned from the stakeholder engagement process.

Seven (7) Targeted focus groups – Will be implemented to ensure representation and inclusion of historically diverse and underserved groups and to focus on specific key economic development topics that may emerge from the survey engagement. This strategy will inform and amplify data, research and recommendations that will help inform and support the proposed economic development plan.

Questions 5 - Coordination and Collaboration Between Services

Our business model seeks to ensure collaboration between key partners and our community collaborators by design. We expect that during the grounding and planning segment of the project we will refine the needs around coordination and collaboration. Further, we expect that as we move through the engagement process and the project planning meeting we will keep partners informed and updated for strong data sharing practices.

As a business practice we document and share our work and findings. And, as such we would seek to effectively share that work with the data gathering (research partner) consultant identified for this RFP. Moreover, we will summarize and develop both quantitative and qualitative themes and other information gathered to ensure the data research partner hired along with our client partner can deepen their understanding of community and stakeholder needs and voice. For our team this is important as we aim to successfully support community voices being embedded into future planning so that ideas are sustainable and make impact.

The proposal is designed to ensure our team will remain engaged in an advisory capacity, offering guidance and expertise as the City drafts the economic plan and prepares for Common Council submission. We will help co-create integrated feedback loops between our teams, City staff, and the advisory group. We believe this will ensure insights and questions are addressed and incorporated to support the final economic development plan submitted.

In order to ensure that community input directly informs the long term development goals and strategies for the city. Our collaborative methodology affirms our commitment to ensure community and stakeholder input is not only gathered but meaningfully integrated into the economic development plan, thus creating a truly responsive and effective strategy for Madison's future!



Form A: Price Proposal and Signature Affidavit

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

PRICE PROPOSAL

Prepare your price proposal as follows:

- **All Inclusive** – Your price proposal must cover all direct and indirect necessary expenses including but not limited to; travel, telephone, copying, and other out-of-pocket expenses.
- **Not To Exceed** – The actual fees must not exceed the amount specified in your price proposal.
- **Fixed Fee** – All prices outlined in your proposal must remain fixed and valid for the entire length of the contract and any/all renewals.
- **Unit Pricing, where applicable** - For any given item, the quantity multiplied by the unit price establishes the extended price. If an apparent mistake exists in the extended price, the unit price will be used in the bid/proposal evaluation.
- **FOB (Free on Board) Destination Freight Prepaid and Allowed** – If goods are included, you are responsible for the cost of delivering all goods to our location, including handling, delivery, transportation, and insurance charges. Failure to bid FOB Destination Freight Prepaid and Allowed may disqualify your proposal.
- **Do not include sales tax in your proposal.** The City of Madison is exempt from federal excise taxes and State of Wisconsin taxes per section 77.54(9a) of the Wisconsin Statutes.
 - CES No. 008-1020421147-08
 - Wisconsin Department of Revenue Form S-211:
<https://www.cityofmadison.com/finance/purchasing/vendor-resources/letter-of-credit/wisconsin-department-of-revenue-form-s-211>.

Please complete the Excel Workbook 13077 Form D2. When you submit, do not format into a pdf, please send back as an Excel file.

SIGNATURE AFFIDAVIT

Proposer's Certification:


By submitting this proposal, we certify that:

- This entire proposal, including the Price Proposal, has been developed independently and not in collusion with other proposers or anyone competing for the award of this RFP.
- We have not knowingly disclosed the contents of this proposal to any other proposer, anyone competing for the award of this RFP.
- We have not taken any action that would interfere with free competition on this RFP.
- We have not violated any laws in the submission of this proposal or participation this RFP.
- All information in this proposal is true and accurate to the best of our knowledge.

Agreement to comply with all terms of RFP: By submitting this proposal, we agree to comply with all of the terms, conditions, and specifications of this RFP, the sample contract, and any contract awarded under this RFP.

EQT By Design, LLC

COMPANY NAME



10/9/2024

SIGNATURE

DATE

Annette Miller

CEO/Founder

NAME OF PERSON SIGNING

TITLE OF PERSON SIGNING



Form B: References

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

Complete Green Streets (City of Madison - Madison, WI)

EQT By Design was asked to subconsult with Toole Design to engage and seek diverse perspectives for the development and preparation of a modal hierarchy that is embedded with an equity lens. EQT has been responsible for the targeted small group engagement for the phases of the project while also offering an equity lens to ensure the modal hierarchy developed is inclusive and equitable. ***The city was awarded recognition by the APA for this project!***

Project Start/End Date	2021 - 2022
Client Contact	Renee Calloway City of Madison rcalloway@cityofmadison.com
Project Manager	Toole Design
EQT Team	Annette Miller Matthew Braunginn
Products/Reports - Internet links as applicable	TPPB - Update on Stage 1 engagement summary and equity framework <ul style="list-style-type: none"> Complete Green Streets Guide refer to 1.3-1.5, 2.2-4.1

Community Development Division Older Adults Analysis

The Community Development Division (City CDD) seeks to build and deliver a more inclusive service model that promotes successful aging among the diverse and growing older adult (55+) population in Madison. EQT By Design's (EQT) strategy will support the City CDD in identifying engagement successes and challenges, as well as developing opportunities, strategies, models, and community values and priorities for increasing accessibility and inclusive service provision for diverse older adult populations. **City of Madison 2025 Older Adult Services budget is based on engagement study recommendations of EQT By Design.**

Project Start/End Date	December 2023 - December 2023
Client Contact Project Manager	Yolanda Shelton Morris - CDD Community Resources Manager YShelton-Morris@cityofmadison.com EQT By Design: Annette Miller Mathias Lemos Castillo
Products/Reports - Internet links	Older Adult Summary Engagement Findings

CDA Triangle Redevelopment (Madison, Wisconsin)

In June of 2022, the CDA partnered with a local team for the redevelopment. The redevelopment project has been dubbed Taking Shape, Our Triangle. New Year Investments is partnering with the CDA as the lead developer for the project and EQT By Design was hired for engagement and equity planning.

EQT By Design through open houses, a CDA resident survey, building by building focus groups, a community-wide survey, CDA resident workshops and stakeholder interviews, hundreds of individuals and more than a dozen organizations contributed their expertise and shared their lived experience to the Taking Shape Development Plan.

Project Start/End Date	March 2022 - expected completion 2032
Client Contact Project Manager	Matt Wachter Planning and Development Director Larry Kilmer CDA New Year Investments
EQT Team	Annette Miller Mathias Lemos Castillo
Products/Reports - Internet links as applicable	https://www.our-triangle.com/



Form C: Vendor Profile

RFP #: 13077-0-2024-BP Economic Development Plan Consulting Services

COMPANY INFORMATION

COMPANY NAME (Make sure to use your complete, legal company name.) EQT By Design, LLC			
FEIN 82-144510 (If FEIN is not applicable, SSN collected upon award)			
CONTACT NAME (Able to answer questions about proposal.) ANNETTE MILLER		TITLE CEO / FOUNDER	
TELEPHONE NUMBER (608) 371-9527		EMAIL annette@eqtbydesign.com	
ADDRESS 2 Abilene Court	CITY Madison	STATE WI	ZIP 53719

AFFIRMATIVE ACTION CONTACT

If the selected contractor employs 15 or more employees and does aggregate annual business with the City of \$50,000 or more, the contractor will be required to file an Affirmative Action Plan and comply with the City of Madison Affirmative Action Ordinance, Section 39.02(9)(e), within thirty (30) days contract signature. Vendors who believe they are exempt based on number of employees or annual aggregate business must file a request for exemption. Link to information and applicable forms:

<https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/vendors-suppliers>

CONTACT NAME SAME AS ABOVE	TITLE		
TELEPHONE NUMBER	EMAIL		
ADDRESS	CITY	STATE	ZIP

ORDERS/BILLING CONTACT

Address where City purchase orders/contracts are to be mailed and person the department contacts concerning orders and billing.

CONTACT NAME SAME AS ABOVE	TITLE		
TELEPHONE NUMBER	EMAIL		
ADDRESS	CITY	STATE	ZIP

LOCAL VENDOR STATUS

YES, we are a local vender and are registered at the City of Madison under the following category Business & Professional Services

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website.
<https://www.cityofmadison.com/finance/purchasing/local-businesses/register-business/>
