



REQUEST FOR PROPOSALS
EDGEWOOD CANDLER MARTA STATION TRANSIT ORIENTED DEVELOPMENT

The Atlanta Development Authority d/b/a Invest Atlanta ("Invest Atlanta") is soliciting responses to this Request for Proposals ("RFP") including detailed development plans and financial models from interested and qualified firms capable of developing Parcel D1107 at Edgewood/Candler Park Station in a manner consistent with Invest Atlanta's and the Metropolitan Atlanta Rapid Transit Authority ("MARTA or the "Authority")'s objectives and Transit Oriented Development ("TOD") Guidelines.

Invest Atlanta has been created and is existing under and by virtue of the Development Authorities Law, activated by a resolution of the Council of the City of Atlanta, Georgia (the "City") and currently operates as a public body corporate and politic of the State of Georgia. Invest Atlanta was created to promote the revitalization and growth of the City and serves as the City's economic development agency. Invest Atlanta represents a consolidation of the City's economic and community development efforts in real estate, finance, marketing and employment, for the purpose of providing a focal point for improving the City's neighborhoods and the quality of life for all of its citizens. Invest Atlanta is the cornerstone of an overall effort to provide economic and development services in a more effective and efficient manner.

MARTA is Atlanta's and the Southeast United States' largest public transit system that has been providing bus service since 1972 and rail service since 1979 to patrons in DeKalb and Fulton counties. MARTA has 91 bus routes, 38 rail stations and over 48 miles of track that have over 450,000 average weekday boardings. The Federal Transit Administration (FTA) encourages transit systems such as MARTA to undertake Transit Joint Development projects either under new grants or with property acquired under previous grants, whether the property is associated with rail, bus, or other transit facilities.

Invest Atlanta and MARTA have entered into a Letter Agreement by which Invest Atlanta is facilitating the RFP for the Edgewood/Candler Park Station; and thus, unless otherwise instructed, all inquiries should be directed to Invest Atlanta.

All responses to this RFP (each, a "Response" or "Proposal") must be submitted in hard copy (one original and five copies) and on CD in Adobe Acrobat format by no later than 2:00 p.m., Monday, April 28, 2014. Responses received after this time and date **will not** be considered. Please address the Response to:

Alan Ferguson, Sr.
Neighborhood Revitalization Manager
The Atlanta Development Authority d/b/a Invest Atlanta
133 Peachtree Street, Suite 2900
Atlanta, Georgia 30303

INTRODUCTION

Invest Atlanta is soliciting responses to this RFP from Developers and/or Development Teams (the “Respondent(s)”) capable of developing the parcel at Edgewood/Candler Park Station which is comprised of approximately +/-5 acres, designated by MARTA as Parcel D1107 (the “Subject Property”) in a manner consistent with the City of Atlanta’s and MARTA’s objectives and Transit Oriented Development (TOD) Guidelines. **This is a one-step RFP, therefore Developers and/or Development Teams are asked to submit a detailed development plan and financial model that illustrates the potential economic return to MARTA and consideration for Invest Atlanta for the facilitation of the RFP and the compliance monitoring for the affordable workforce housing component.**

The Subject Property consists of a parking lot used for commuter parking and an unused parking lot. The Subject Property is located east of Whitefoord Avenue, adjacent to Mayson Avenue to the east, and LaFrance Street to the south. Immediately north of the parking lot is the Edgewood/Candler Park Station. The Subject Property occupies a key site within walking distance of the Edgewood Retail Shopping Center to the west, the Schwan’s Bakery to the east, with the surrounding community primarily consisting of residential uses. The Edgewood/Candler Park Station is three stops from Downtown Atlanta.

A location map, aerial photograph, site photographs, survey, sewer plan, and geotechnical report are included in Section IV-Exhibit A. A real estate market analysis and list of additional economic resources are included in Section V-Exhibit B.

SUBMITTAL DEADLINE

Proposals should be submitted to Invest Atlanta no later than **2:00 p.m.**, local time on **April 28, 2014**. Invest Atlanta will reject all Proposals received after that time. All Proposals should also include the other forms attached to or called for by this Request for Proposals. **A signed original and five (5) hard copies as well as one (1) copy on CD or DVD in PDF (Adobe Acrobat) format of the Proposal must be submitted.** All Proposals received shall become the property of Invest Atlanta, and may, without compensation to the Respondent, be used or disposed of as Invest Atlanta stipulates. Please address the Response to:

Alan Ferguson, Sr.
Neighborhood Revitalization Manager
The Atlanta Development Authority d/b/a Invest Atlanta
133 Peachtree Street, Suite 2900
Atlanta, Georgia 30303

Proposals may be delivered by hand, in which case they should be delivered to the Front Desk, in the 29th floor lobby of Invest Atlanta in the Georgia Pacific Building (133 Peachtree Street, N.E.).

Respondents should be aware that Proposals may be subject to disclosure under the Georgia Open Records Act. It is the responsibility of the Respondent to take any action the Respondent deems necessary to protect confidential and proprietary information or trade secrets that may be included in Proposals. This should include, as a minimum, identifying on those pages or portions of pages that are truly confidential, proprietary or a trade secret.

INQUIRIES

Prospective respondents are strongly encouraged to submit inquiries regarding this RFP by email, in writing to:

Alan Ferguson, Sr.
Neighborhood Revitalization Manager
Invest Atlanta
Email: edgewoodRFP@investatlanta.com

Only inquiries received in writing will receive a response. All such written inquiries must be delivered electronically by 5:00 p.m., Friday, March 14, 2014. Invest Atlanta will publish a response to all inquiries on its website (www.investatlanta.com) on or before March 21, 2014. All Respondents to this RFP are advised to visit Invest Atlanta's website on or after March 21, 2014 to view Invest Atlanta's response to inquiries.

PROJECT OVERVIEW

The Edgewood/Candler Park Station area has been the focus of two recent studies, the first in 2008 and the other in 2011. In 2008, the Edgewood community commissioned Market + Main, a local research and planning consultant, to produce the Edgewood Community Master Plan. The plan is part of an effort by the community to ensure that the area lives up to its potential as a vibrant, sustainable, and diverse in-town neighborhood. The master plan focused on Land Use, Zoning, Urban Design, Connectivity, and Market elements, with recommendations for each.

In 2011, Southface and the Atlanta Regional Commission (ARC) led a group of local non-profits, professionals and stakeholders to undertake the Edgewood design charrette in April of 2011. The charrette focused on the south parking lot of the station and created two final concept plans; a "Pocket Parks" concept and a "Central Commons" concept.

The design team developed two visions for the Subject Property, each with similar features and concepts although both are unique. Both plans include mixed-use development containing green space and maintaining current MARTA bus operations as is. Both plans extend Lowery and Hutchinson Streets into the development, however additional street connections are recommended.

Concept A is the Pocket Parks concept. The Pocket Parks concept contains two 4-5 story mixed use buildings that are built around two separate parking garages. The project maintains the existing MARTA tower and escalators, but it develops covered MARTA bus bays under the eastern parking garage. The design maintains its focus on the concept of pocket parks, with a splash fountain park at the corner of Whitefoord Ave. and LaFrance St., a “Community Living Room” park between the extensions of Hutchinson and Lowry and Greenspace along the street frontage. A key component of this site is the development of a Transit Plaza where civic space and retail would be located.

Concept B is the Central Commons concept. The Central Commons concept contains three 4-5 story mixed use buildings that contain one main parking garage and a smaller below grade podium garage that is covered by a residential courtyard. The centerpiece of the development is a central community commons and an iconic MARTA tower built onto the existing MARTA Tower and escalator. This tower provides a key focal point for the development fostering a greater sense of “place.” The Central Commons concept contains a smaller transit plaza than the Pocket Parks scheme and maintains the current MARTA Bus loading area. The Central Commons concept has garage access from Whitefoord Avenue.

Respondents are encouraged to offer proposals for any other use or uses as long as they are consistent with both MARTA's TOD Guidelines as well as existing City of Atlanta zoning and land use plans for the area.

The station serves two established residential neighborhoods experiencing growth in population, income, and demographic diversity which adds to its desirability for development. As such Invest Atlanta encourages the Respondent(s) to exercise their best efforts to include in their Proposals the participation of Disadvantaged Business Enterprises (“DBEs”).

GOALS

MARTA’s overarching strategic goals for Transit Oriented Development include:

- To generate greater transit ridership – a natural consequence of clustering mixed-use development around stations and along corridors;
- To promote a sustainable, affordable and growing future for the people of Metro Atlanta; and
- To generate a return on MARTA’s transit investment- through enhanced passenger revenues, greater federal support, and development on MARTA property.

CERTIFICATIONS

The successful Respondent will be required to certify that during term of contract for the development of the Subject Property (“Contract”) and for one year thereafter none of the following has or will have any interest, direct or indirect, in the Contract or in any part of the development on the Subject Property

thereof: members of Invest Atlanta or MARTA's Board of Directors; officers, employees of Invest Atlanta or MARTA, or of any representative of Invest Atlanta or MARTA in the administration of the Contract, pursuant to Invest Atlanta's Guiding Principles of Ethics and MARTA's Code of Ethics. This section also applies to members of or delegates to the United States Congress or the Georgia legislature; and members of the governing body, and all other officers and employees, of the City of Atlanta or the Counties of Clayton, Cobb, DeKalb, Fulton, or Gwinnett, Georgia.

EXPLANATION and COMMUNICATION WITH MARTA and INVEST ATLANTA

Respondents shall have no contact with the officers, employees, consultants or other individuals representing Invest Atlanta or MARTA regarding the RFP during the Proposal submittal, evaluation or award process, except as authorized by Invest Atlanta's legal staff. Invest Atlanta has discretion to reject a proposal received from a Respondent who has violated this request.

ACCESS TO SUBJECT PROPERTY

Access to the Subject Property will be granted from March 3 -14, 2014. Respondents who would like access to the Subject Property should contact Invest Atlanta prior to accessing the Subject Property to advise when the Respondent will be on-site. Neither Invest Atlanta nor MATA assume any liability for Respondents accessing the Subject Property.

EQUAL EMPLOYMENT OPPORTUNITY AND DISADVANTAGED BUSINESS UTILIZATION

Prospective Respondent(s) are strongly encouraged to consider the use of DBEs in all aspects of the development and should document their efforts, if any, in this regard as a part of their Proposal submittal. Invest Atlanta encourages, but does not require, all Respondents to promote opportunities for DBEs, including Minority Business Enterprises ("MBE"), Female Business Enterprises ("FBE") and Small Business Enterprises ("SBE") to compete for business as subcontractors and/or suppliers. However, nothing herein should indicate that an MBE, FBE or SBE may not apply and be selected independently, as MBEs, FBEs, and SBEs that meet the qualifications of this RFP are encouraged to submit their qualifications for consideration. For an MBE, FBE or SBE to participate on the contract, said MBE, FBE or SBE must be certified as an MBE or FBE and be registered with the City's Office of Contract Compliance M/FBE Register. SBEs must be registered with the City and are defined as businesses not exceeding \$2.5 million in gross sales during the recent calendar or fiscal year.

Firms interested in obtaining applications for certification should contact these organizations:

- **City of Atlanta – Office of Contract Compliance (MBE/FBE/SBE):** Hubert Owens, Director, Office of Contract Compliance, 55 Trinity Avenue, Atlanta, Georgia 30303, Tel: 404.330.6010, Fax: 404.658.7359, email: howens@atlantaga.gov.

All firms must be registered or certified prior to the submittal of the Response. A Respondent is at risk in that there may be an issue of time to certify or register if it intends to use a firm that is not certified or registered at the time the Response is submitted.

Invest Atlanta is an Equal-Opportunity Employer.

PROPOSAL EVALUATION and AWARD

Proposals will be evaluated by an evaluation team selected by Invest Atlanta. The evaluation team will conduct an evaluation of the Respondents' Proposals based on the evaluation criteria described below.

The Evaluation Team will evaluate and score Proposals that are deemed responsive, according to the criteria set forth below:

- 1) *Respondent's Team Project Experience 10 points*
- 2) *Development Plan 20 points*
- 3) *Respondent's Team Composition 5 points*
- 4) *Respondent's Team Staff Experience 5 points*
- 5) *References 5 points*
- 6) *Financial Capability 20 points*
- 7) *Alignment with community plan adopted by the city of Atlanta and TOD Guidelines 10 points*
- 8) *Projected ridership generation 5 points*
- 9) *Financing Plan and Financial Consideration 20 points*

Once the Responses are reviewed and scored, a short list, if necessary, may be compiled by the evaluation team. Interviews may be conducted with the firm(s) determined to be the most qualified and additional information may be required at that time. Negotiations will be held with the firm which has the successful response. The selected firm must be prepared to enter negotiations for the project scope outlined in this RFP.

DISQUALIFICATION

Invest Atlanta reserves the right to disqualify Proposals, before or after the Proposal submission date, upon evidence of collusion with intent to defraud or other illegal practices on the part of the Respondent. Notwithstanding the foregoing, Invest Atlanta reserves the right to reject any or all Proposals, or parts thereof, whenever such rejections are determined to be in the best interest of Invest Atlanta.

INSURANCE REQUIREMENTS

The Respondent shall maintain in effect during the term of the agreement, at the Respondent's expense, at least the following coverage and limits of insurance:

- *Commercial General Liability, Bodily Injury and Property Damage, including Contractual Liability and Products/Completed Operations Liability without the explosion, collapse and underground (XCU) exclusions eliminated of not less than \$50,000,000 single limit per occurrence. Limits of Liability may be provided under a Commercial General Liability policy and Umbrella Liability policy if desired.*
- *Workers Compensation -Georgia Statutory coverage and Employers Liability of not less than \$1,000,000.*
- *Automobile, Bodily Injury and Property damage Liability, with not less than \$10,000,000 single limit per occurrence.*
- *Professional Liability, not less than \$1,000,000 single limit per occurrence.*
- *Pollution Liability, not less than \$1,000,000 single limit per occurrence.*
- *Builders Risk: During the course of construction, Builders Risk insurance is required on a completed value basis against all risks of physical loss, covering the replacement cost value of worked performed and the equipment supplies and materials.*
- *All policies shall contain a Waiver of Subrogation as applicable.*
- *MARTA, the Atlanta Development Authority dba Invest Atlanta, and City of Atlanta should be listed as an Additional Insured on all policies as applicable. The foregoing coverages shall be secured from insurers and on forms of policies acceptable to Invest Atlanta and shall include provisions that such insurance cannot be canceled, nor its limits reduced, without at least thirty days prior written notice to Invest Atlanta, Portfolio Servicing, 133 Peachtree Street, NE, Suite 2900, Atlanta, Georgia 30303.*
- *Before beginning work under an agreement, the Respondent or its contractor shall provide to Invest Atlanta certificates of insurance satisfactory to it showing that all such insurance is in effect, and if any such insurance expires or is cancelled before all work under the Contract has been completed, shall provide like evidence of the extension, renewal, or replacement therefore before such insurance expires or lapses.*

- *The Respondent shall furnish evidence of the above in the form and format requested by Invest Atlanta to the Neighborhood Revitalization Manager, 133 Peachtree Street, N.E, Suite 2900, Atlanta, Georgia 30303.*

SECTION II – INSTRUCTIONS FOR PROPOSAL PREPARATION

PROPOSAL FORMAT

Responses to this Request for Proposals (RFP) should follow the format described in this section. The required elements should be presented clearly and briefly and be supported by any necessary attachments regarding individual components. Proposals shall be prepared on standard 8.5" x 11" letter size paper. The font used should be at least 12 point. **Responses should be no more than 30 pages excluding financial statements and appendices.** Proposals should be indexed, bound and organized in the following order:

- A. *Title page - The title page showing the RFP's subject, the firm's name, address and telephone and fax numbers of the contact person(s) and the date of the Proposal.*
- B. *Table of Contents - A table of contents outlining and indexing the contents of the Proposal.*
- C. *Transmittal Letter - A signed letter of transmittal briefly stating the proposers' understanding of the work to be performed, the commitment to perform the work, and the statement why the firm believes it is best qualified to perform the engagement.*
- D. *Proposal Elements - Response to each item set forth under "PROPOSAL ELEMENTS".*
- E. *Appendix - Supporting schedules and information.*
- F. *Number of Copies - Provide an original, five (5) hardcopies, and 1 CD or DVD containing a PDF copy of your Proposal.*

PROPOSAL ELEMENTS

The following pages detail the requirements for each Respondent's submission to Invest Atlanta. Compliance with the specific requirements will be a factor in evaluating the proposals. For consistency, the following definition will apply:

The Respondent or Respondent's Team ("Team") refers to the single organization or group of organizations that will execute the project, enter into agreements with Invest Atlanta and lease and operate the completed project. In the event that there is a Development Team, please define the responsible, decision-making authority and submit all requested information for each organization that comprises the Team.

Proposal response must include the following:

ORGANIZATIONAL STRUCTURE and BUSINESS RELATIONSHIPS

This project must be undertaken in the spirit and practice of full disclosure. In addition, both MARTA and Invest Atlanta are public entities and are responsible to a number of constituencies and must be aware of relationships with those groups. To this end, please provide the following information for the Respondent:

- A. Legal form of the Respondent and the state in which it is domiciled. In the case where the Respondent is an affiliation of two or more firms, please provide information for all participants and the nature of the relationship. This could include organization documents or a brief description of the rights and obligations of the parties.
- B. Name, address, telephone and fax number for the contact person authorized to communicate and negotiate on behalf of the Respondent.
- C. Provide name and firm of primary outside legal counsel(s) to be involved in this project.
- D. Provide name of auditor for each entity and name of primary contact.
- E. List any outstanding disputes, business relationships, or conflicts of interest between the Respondent and the following entities:
 - 1) Invest Atlanta
 - 2) MARTA
 - 3) City of Atlanta Government
 - 4) The United States Department of Transportation
 - 5) Federal Transit Administration
 - 6) Georgia Department of Transportation
 - 7) Housing Authority of the City of Atlanta
 - 8) Fulton County Development Authority
 - 9) Fulton County Government
 - 10) Fulton County Housing Authority
 - 11) Other relevant agencies and organizations

EXPERIENCE AND QUALIFICATIONS

To allow Invest Atlanta to fully understand the experience and capabilities of the Respondent's Team, please provide the following information for each member of the Respondent's Team. Please highlight projects where members of the Respondent's Team have worked together.

- 1) Description of experience within the past ten (10) years with particular emphasis on projects comparable to the development proposed for the Subject Property:

- a) Specific land uses, such as multi-family residential, proposed within your concept development plan;
 - b) Experience in the Atlanta MSA;
 - c) Transit Oriented Development Projects;
 - d) Experience with affordable housing;
 - e) Experience working with other public agencies, specifically public transit agencies if applicable.
- 2) Description of each project will include:
- a) Size in total land area and building area;
 - b) Scope of the project;
 - c) Location of the project;
 - d) Approximate development value;
 - e) Year completed;
 - f) Specific role of Development Team firms; to include any financing team roles and responsibilities on any bank financing support;
 - g) Past role(s) of individuals expected to work on the development proposed for the Subject Property (if applicable);
 - h) Client references and authorization to contact them. Please highlight any previous experience with public agencies (if applicable).
- 3) Resumes of personnel to be involved in the development proposed for the Subject Property on a day to day basis, including:
- a) Education and professional licensing;
 - b) Specific relevant experience;
 - c) Specific role in proposed project.
- 4) Proposed Subcontractors and Disadvantaged Business Enterprise Participation
- a) List of proposed subcontractors and project role; highlight DBE subcontractors, if any
 - b) State percentage of DBE participation, if any

FINANCIAL CAPABILITY

Given the nature of this project, Invest Atlanta must understand the Respondent's financial capability to undertake and successfully complete this project. Please provide the following for the Respondent:

- 1) Summary financial statements for the past two (2) years (Note: The successful Respondent may need to provide audited financial statements for the past two years upon Invest Atlanta's or MARTA's request.)
 - a) Balance sheet;
 - b) Income statement;
 - c) Statement of change in financial position.

- 2) Names and phone number of references for the following:

- a) Two commercial banks; to include existing relationship(s) with Bank services, Bank Finance Partners, Credit Providers, or other Banking Institutions.
 - b) Two institutional partners.
- 3) Terms and conditions of any significant contingent liabilities, such as guaranteed loans or other obligations which could affect this project.
 - 4) Any financial statements that are deemed to be confidential shall be marked as Proprietary.

PROJECT DEVELOPMENT PLAN AND FINANCIAL MODEL

Please note that it is unlikely that Federal Transit Administration funds (including Livable Centers Initiative grants) will be available for the Subject Property, so do not include this as a source in the Financial Model. Please submit the following:

- 1) State the vision of the proposed development plan, including key architectural and community goals;
- 2) Describe the development plan, including proposed mix of uses and density for the overall project, including a general description of planned building densities, including building heights, affordable housing units and open space;
- 3) State how Respondent's plan integrates or deviates with adopted plan of the City of Atlanta
- 4) Provide a development timeline;
- 5) Provide one (1) 11 x 17 sized visual depiction of project, by providing an illustration such as a drawing or artist's rendering that clearly explain the location and appearance of the proposed improvements;
- 6) Provide one (1) 11 x 17 sized site plan;
- 7) Financial Model including:
 - (a) Sources and uses of funds
 - (b) Development and operating budgets
 - (c) Ground lease payments or acquisition price for the property to MARTA
 - (d) Consideration for Invest Atlanta compliance and facilitation

OTHER INFORMATION

Provide any additional information that is relevant to your firm's Proposal to provide the services required by the RFP.

TIMELINE AND DELIVERABLES

Invest Atlanta will ensure that the selected Respondent has access to all necessary files, reports and personnel required to complete the Scope of Services. The following is an approximate project schedule, subject to modification:

Due Date	Action Required
February 28, 2014	Release of RFP
March 3-14, 2014	Subject Property Access
March 14, 2014	Inquiries regarding RFP due
March 21, 2014	Responses to Respondents inquiries posted on Invest Atlanta website
April 28, 2014	Responses due to Invest Atlanta at 2pm
April 29 – May 16, 2014	Response review process
May 19 - 23, 2014	Interviews with selected Respondents if necessary; otherwise successful Respondent selected
May 30, 2014	Successful Respondent selected if interviews are required

TERMS AND CONDITIONS

All proposals and supporting materials as well as correspondence relating to this RFP become property of Invest Atlanta when received. Any proprietary information contained in the Response should be so indicated. However, a general indication that the entire contents, or a major portion, of the proposal is proprietary will not be honored.

- A. All applicable State of Georgia and federal Laws, City and County ordinances, licenses and regulations of all agencies having jurisdiction shall apply to the Respondent and project throughout and are incorporated herein. The contract with the selected Respondent, and all questions concerning the execution, validity or invalidity, capability of the parties, and the performance of the contract, shall be interpreted in all respects in accordance with the laws of the State of Georgia.
- B. Professionals requiring special licenses must be licensed in the State of Georgia, and shall be responsible for those portions of the work as may be required by law.
- C. Sub-contractors/consultants as part of the Project team must be clearly identified in the Response, including roles, resumes of key personnel and project references.
- D. No Response shall be accepted from, and no contract will be awarded to, any person, firm, or corporation that (i) is in arrears to Invest Atlanta or the City with respect to any debt, (ii) is in default with respect to any obligation to Invest Atlanta or the City, or (iii) is deemed irresponsible or unreliable by Invest Atlanta. If requested, the Respondent shall be required to submit satisfactory evidence that they have the necessary financial resources to provide the proposed services.

E. From the date Invest Atlanta receives a Respondent's proposal through the date a contract is awarded to a Respondent(s), no Respondent may make substitutions, deletions, additions or other changes in the configuration of Respondent's proposal or members of Respondent's team.

F. E-Verify. Consultant must comply with the Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. All services physically performed within the State of Georgia must be accompanied by proof of your registration with the E-Verify Program, as well as verification of your continuing and future participation in the E-Verify program established by the United States Department of Homeland Security. A completed E-Verify Contractor Affidavit must be submitted to Invest Atlanta. To the extent there are subcontractors working on this contract, you are responsible for obtaining a fully signed and notarized subcontractor affidavit from those firms with whom you have entered into sub-contracts. In turn, should there be second tier subcontractors on this project, you must require the subcontractors to obtain E-Verify Affidavits from those second tier subcontractors.

G. SAVE Affidavit. In addition to E-Verify, Invest Atlanta is required by the SAVE (Systematic Alien Verification for Entitlements) Program to verify the status of anyone who applies for a public benefit from Invest Atlanta. Benefits are defined by state statute, O.C.G.A. §50 36 1, by federal statute, 8 U.S.C. §1611 and 8 U.S.C. §1621, and by the Office of the Attorney General of Georgia. Contracts with Invest Atlanta are considered "public benefits." Beginning on January 1, 2012, any person obtaining a public benefit must show a secure and verifiable document, and complete the attached SAVE Affidavit. Acceptable documents have been identified by the Office of the Attorney General. Those lists may be found at: <http://law.ga.gov>

SECTION III – POLICIES AND GUIDELINES

TRANSIT ORIENTED DEVELOPMENT (TOD) POLICIES AND GUIDELINES

The MARTA TOD Guidelines (the "Guidelines") include a breakdown of station types, based on such factors as the station's location, density, surrounding land uses and transit operations. The Guidelines classify each of MARTA's thirty-eight (38) rail stations with Edgewood/Candler Park Station classified as a *Neighborhood Station*. The Guidelines specifically define *Neighborhood Stations* as being "... located in primarily residential districts, and their principal transportation function is to help people who live nearby get to work, school, shopping, entertainment and medical services, and other destinations accessible through the transit network". Suggested development characteristics for *Neighborhood Stations* include:

- FAR (Floor Area Ratio, i.e. ratio of land to building area) 1.5 to 5.0
- Residential Units Per Acre 15 to 50
- Height In Floors 2 to 10

While MARTA provides the suggested development characteristics, MARTA encourages the development team to use their creative talents to find the right balance of development based on the guidelines, local area plans and zoning, and the development teams market knowledge and experience. For complete information on the MARTA TOD Guidelines, refer to <http://www.itsmarta.com/TOD-real-estate.aspx>. In addition, MARTA has adopted the following policies to support TOD on MARTA-owned property.

TOD Policy #1 -Land Disposition:

MARTA has established a preference for ground lease over sale of joint development property.

TOD Policy #2 -Station Access:

MARTA has established a priority of access to its stations. Access to stations should be prioritized in the following order:

- 1) Pedestrians
- 2) Bicycles
- 3) Feeder Transit
- 4) Drop off
- 5) Park and Ride

TOD Policy #3 –Parking and TOD:

At the Edgewood/Candler Park Station, **the Authority requires between 160 and 200 replacement parking spaces be provided as part of this proposal. These spaces are to be available for use by MARTA patrons free of charge.**

TOD Policy #4 -Affordable Housing:

MARTA has established a goal of 20% affordable housing for all TOD projects. Affordable housing includes workforce housing, as well as housing affordable to seniors with low, moderate or fixed incomes and persons with disabilities. Workforce housing, in turn, is defined as rental housing affordable to households earning 60% to 80% of the area median income ("AMI") for the metropolitan statistical area ("MSA"); or for-sale housing affordable to households earning 80% to 100% of AMI. Respondents are encouraged to meet or exceed this goal and are allowed flexibility in determining the type of

affordable housing that should be provided to meet this goal. Respondent should, however, explicitly state how they intend to meet this goal.

TOD Policy #5 -Sustainable Business Practices:

Respondent is encouraged to embrace sustainable business practices, as described in the MARTA TOD Guidelines, and show how they will be utilized in development at Edgewood/Candler Park Station.

TOD Policy #6 -Intergovernmental Activities:

MARTA will assume responsibility for securing all necessary Federal Transit Administration (FTA) approvals. Invest Atlanta will coordinate any intergovernmental activity among MARTA, the City of Atlanta and Invest Atlanta.

LOCAL LAND USE

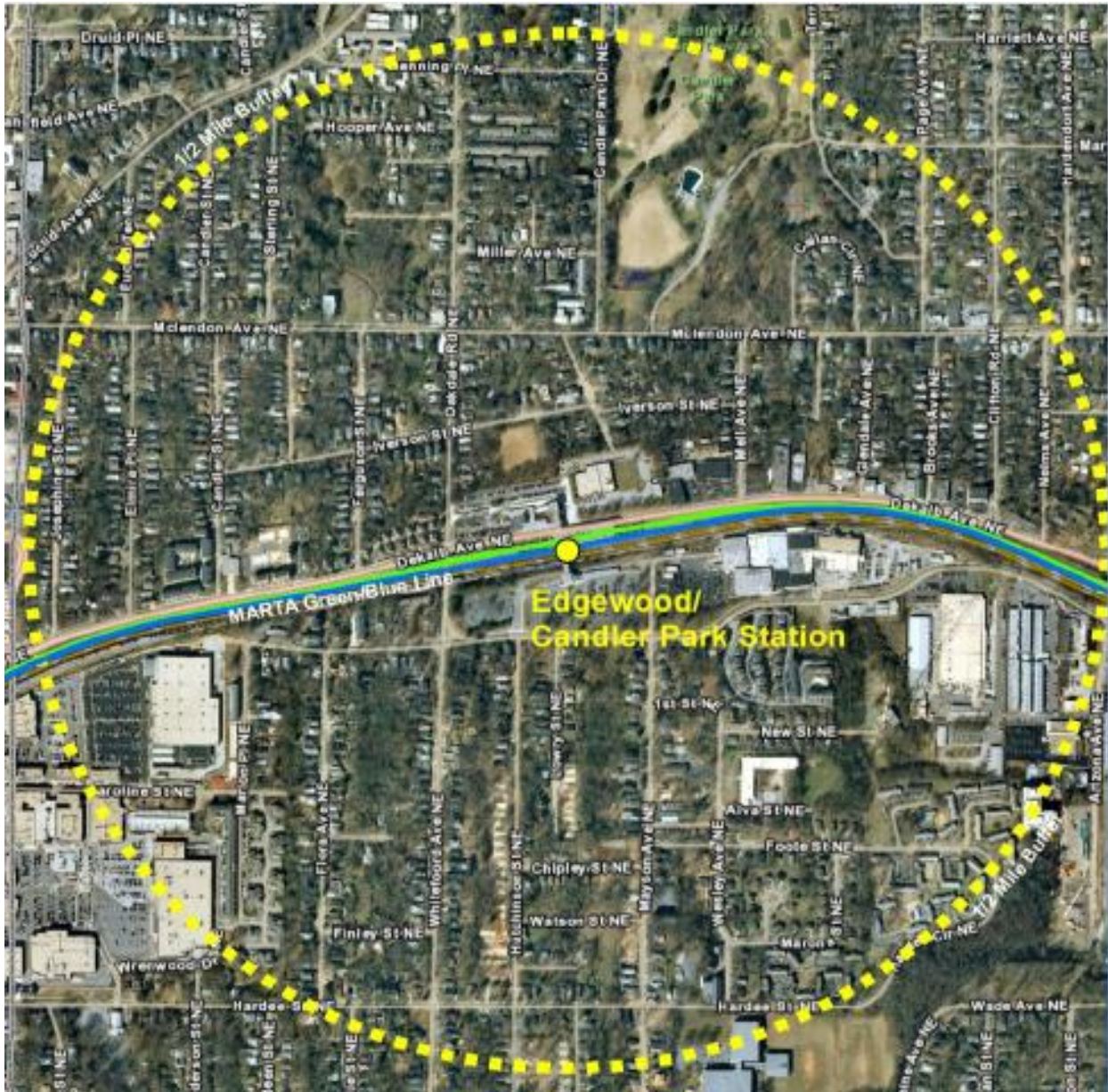
ZONING

Zoning is one of the key elements needed in TOD development. There are two zoning districts that are assigned to the Edgewood/ Candler Park Station. The first district is the I-1 Light Industrial district that covers the north parking lot adjacent to DeKalb Avenue. The second is the C-1 Community Business district that covers the south parking lot. The intent of the I-1 is to provide areas for the manufacture, storage, sale, and distribution of goods and related commercial and industrial activities. The C-1 district is intended to provide medium-intensity retail and service activities in areas already committed to development of this character, or consistent with areas so specified on the comprehensive development plan.

The entire station area is being proactively rezoned by the City of Atlanta, Office of Planning to MRC-3, Mixed Residential and Commercial district. The MRC-3 designation would allow for the mixture of uses commonly found in TOD design and the densities needed to support the development. For the sake of planning, assume that the site is rezoned to MRC-3. See “Edgewood/Candler Park Charette Report” located in Section V – Exhibit B for evidence of community support for rezoning.

Section IV-Exhibit A
Location Map
Aerial Photograph
Subject Property
Site Photographs
Survey
Property Certification Maps

LOCATION MAP

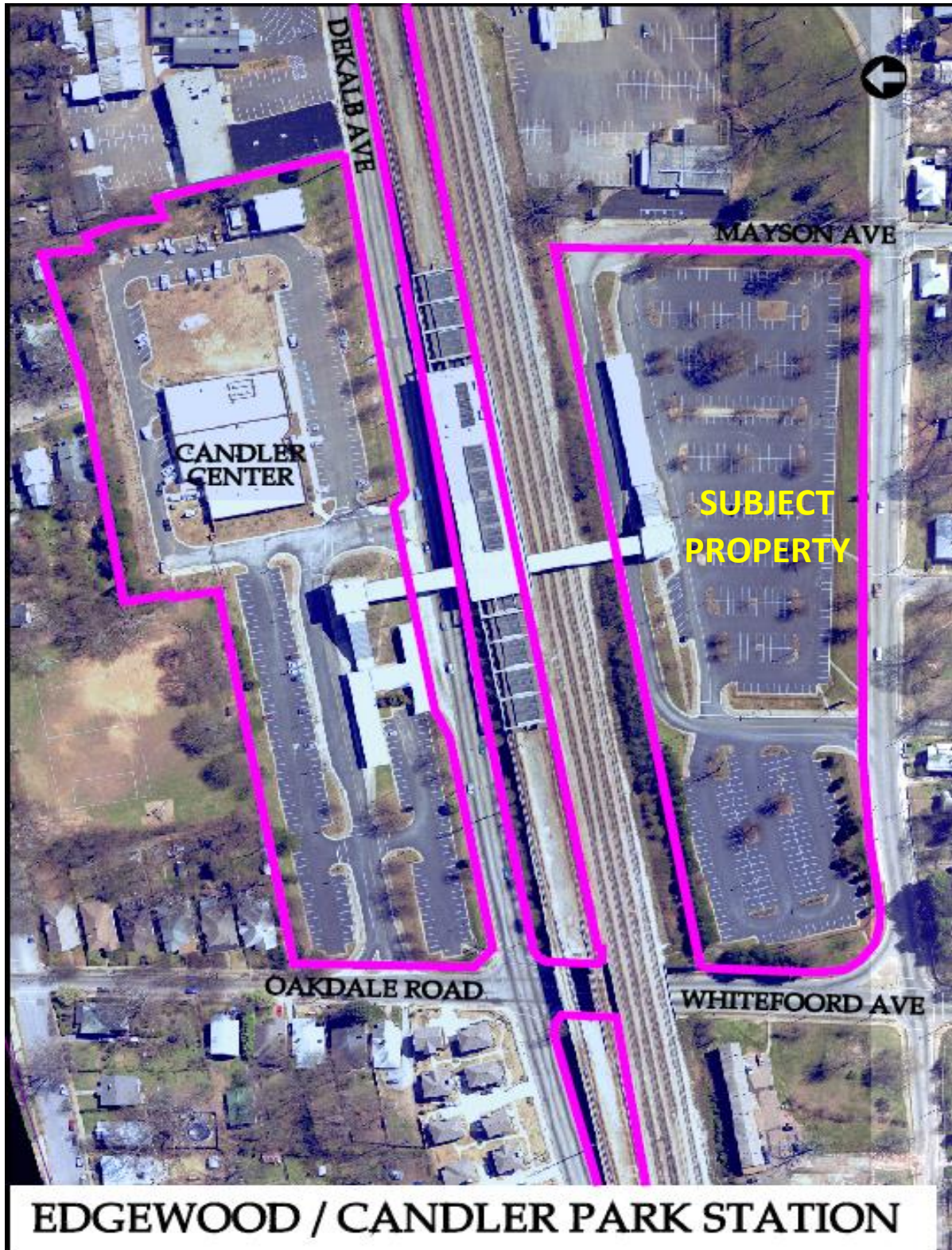


AERIAL PHOTOGRAPH



Aerial Image of Study Area, 2010

SUBJECT PROPERTY



SITE PHOTOGRAPHS



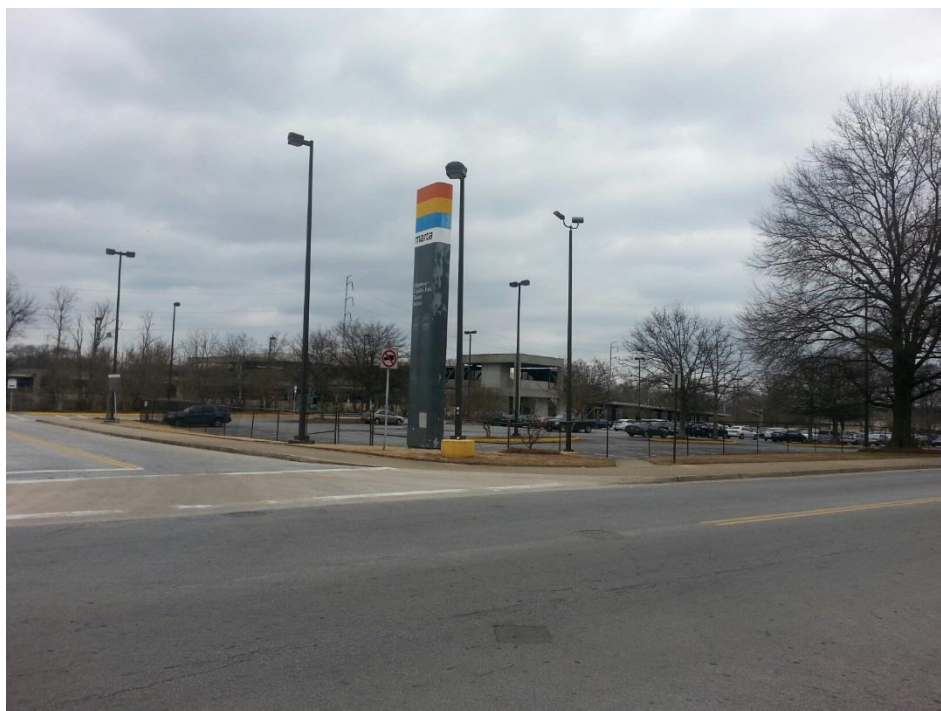
1: Subject Property West View



2: Subject Property NW View from La France & Mayson



3: Subject Property North View from La France

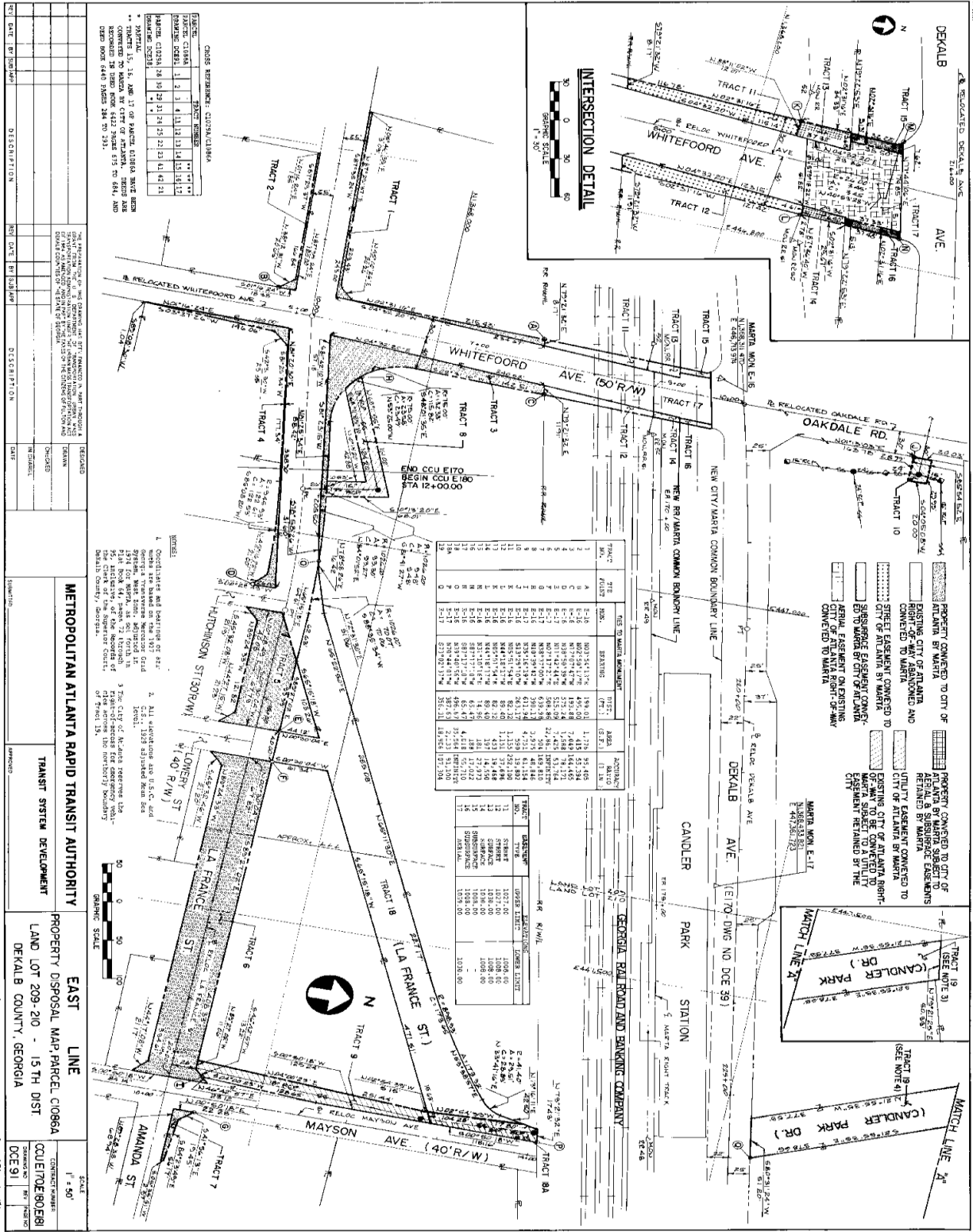


4: Subject Property NE View from La France & Hutchinson



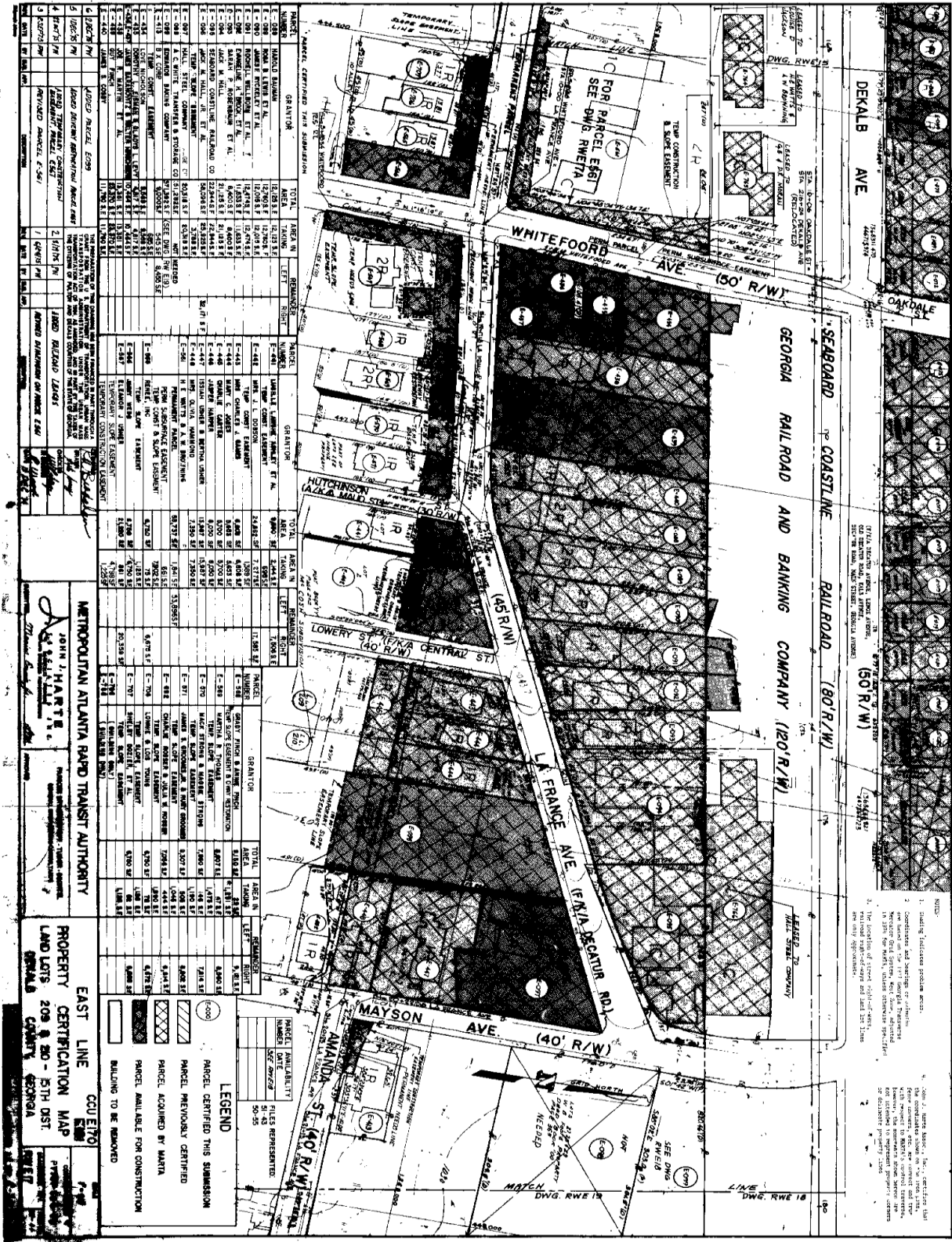
5: Subject Property East View from Whiteford Ave

SURVEY

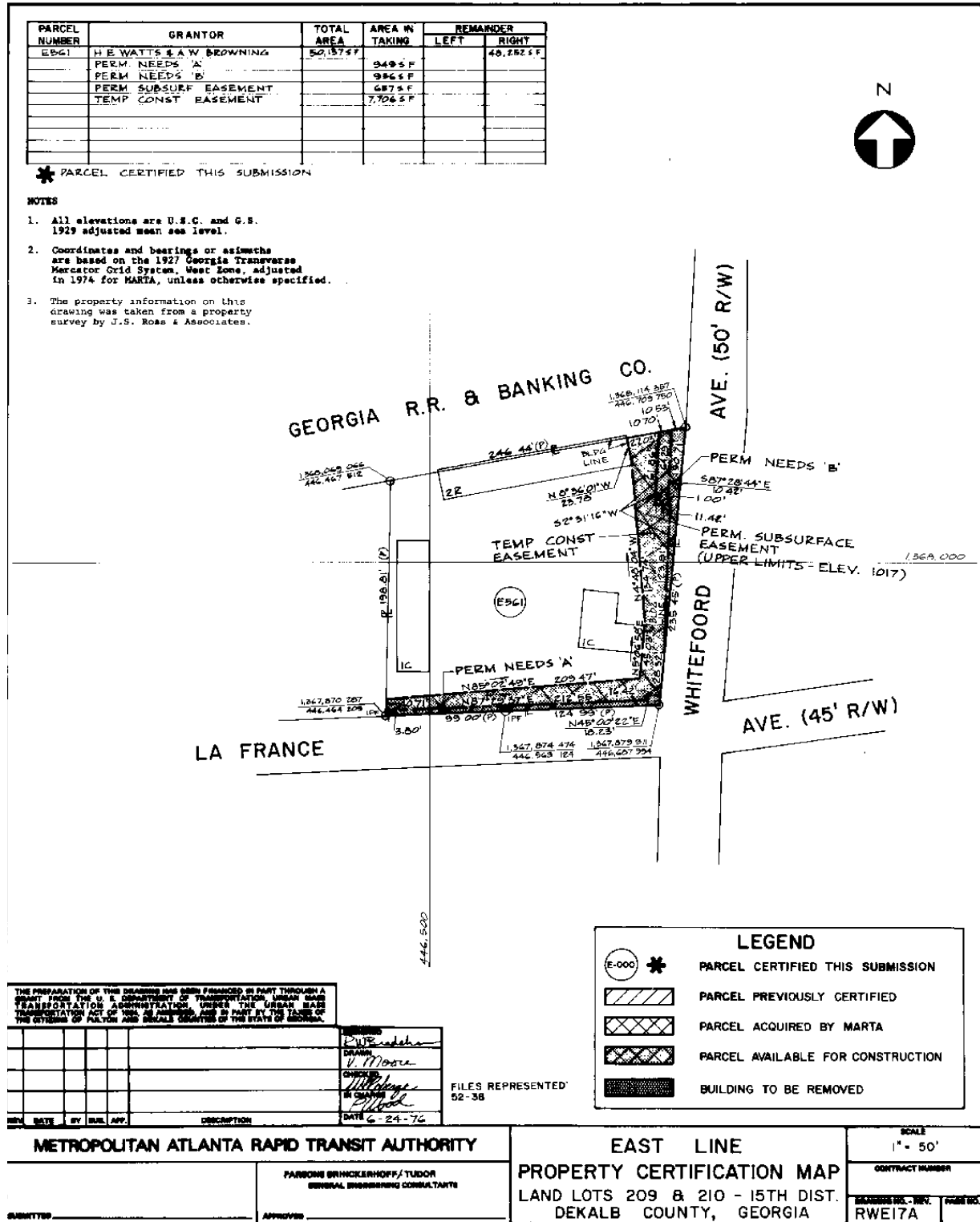


REVISIONS: 1/15/24, 1/16/24, 1/17/24, 1/18/24, 1/19/24, 1/20/24, 1/21/24, 1/22/24, 1/23/24, 1/24/24, 1/25/24, 1/26/24, 1/27/24, 1/28/24, 1/29/24, 1/30/24, 1/31/24, 2/1/24, 2/2/24, 2/3/24, 2/4/24, 2/5/24, 2/6/24, 2/7/24, 2/8/24, 2/9/24, 2/10/24, 2/11/24, 2/12/24, 2/13/24, 2/14/24, 2/15/24, 2/16/24, 2/17/24, 2/18/24, 2/19/24, 2/20/24, 2/21/24, 2/22/24, 2/23/24, 2/24/24, 2/25/24, 2/26/24, 2/27/24, 2/28/24, 2/29/24, 2/30/24, 3/1/24, 3/2/24, 3/3/24, 3/4/24, 3/5/24, 3/6/24, 3/7/24, 3/8/24, 3/9/24, 3/10/24, 3/11/24, 3/12/24, 3/13/24, 3/14/24, 3/15/24, 3/16/24, 3/17/24, 3/18/24, 3/19/24, 3/20/24, 3/21/24, 3/22/24, 3/23/24, 3/24/24, 3/25/24, 3/26/24, 3/27/24, 3/28/24, 3/29/24, 3/30/24, 3/31/24, 4/1/24, 4/2/24, 4/3/24, 4/4/24, 4/5/24, 4/6/24, 4/7/24, 4/8/24, 4/9/24, 4/10/24, 4/11/24, 4/12/24, 4/13/24, 4/14/24, 4/15/24, 4/16/24, 4/17/24, 4/18/24, 4/19/24, 4/20/24, 4/21/24, 4/22/24, 4/23/24, 4/24/24, 4/25/24, 4/26/24, 4/27/24, 4/28/24, 4/29/24, 4/30/24, 5/1/24, 5/2/24, 5/3/24, 5/4/24, 5/5/24, 5/6/24, 5/7/24, 5/8/24, 5/9/24, 5/10/24, 5/11/24, 5/12/24, 5/13/24, 5/14/24, 5/15/24, 5/16/24, 5/17/24, 5/18/24, 5/19/24, 5/20/24, 5/21/24, 5/22/24, 5/23/24, 5/24/24, 5/25/24, 5/26/24, 5/27/24, 5/28/24, 5/29/24, 5/30/24, 5/31/24, 6/1/24, 6/2/24, 6/3/24, 6/4/24, 6/5/24, 6/6/24, 6/7/24, 6/8/24, 6/9/24, 6/10/24, 6/11/24, 6/12/24, 6/13/24, 6/14/24, 6/15/24, 6/16/24, 6/17/24, 6/18/24, 6/19/24, 6/20/24, 6/21/24, 6/22/24, 6/23/24, 6/24/24, 6/25/24, 6/26/24, 6/27/24, 6/28/24, 6/29/24, 6/30/24, 7/1/24, 7/2/24, 7/3/24, 7/4/24, 7/5/24, 7/6/24, 7/7/24, 7/8/24, 7/9/24, 7/10/24, 7/11/24, 7/12/24, 7/13/24, 7/14/24, 7/15/24, 7/16/24, 7/17/24, 7/18/24, 7/19/24, 7/20/24, 7/21/24, 7/22/24, 7/23/24, 7/24/24, 7/25/24, 7/26/24, 7/27/24, 7/28/24, 7/29/24, 7/30/24, 7/31/24, 8/1/24, 8/2/24, 8/3/24, 8/4/24, 8/5/24, 8/6/24, 8/7/24, 8/8/24, 8/9/24, 8/10/24, 8/11/24, 8/12/24, 8/13/24, 8/14/24, 8/15/24, 8/16/24, 8/17/24, 8/18/24, 8/19/24, 8/20/24, 8/21/24, 8/22/24, 8/23/24, 8/24/24, 8/25/24, 8/26/24, 8/27/24, 8/28/24, 8/29/24, 8/30/24, 8/31/24, 9/1/24, 9/2/24, 9/3/24, 9/4/24, 9/5/24, 9/6/24, 9/7/24, 9/8/24, 9/9/24, 9/10/24, 9/11/24, 9/12/24, 9/13/24, 9/14/24, 9/15/24, 9/16/24, 9/17/24, 9/18/24, 9/19/24, 9/20/24, 9/21/24, 9/22/24, 9/23/24, 9/24/24, 9/25/24, 9/26/24, 9/27/24, 9/28/24, 9/29/24, 9/30/24, 10/1/24, 10/2/24, 10/3/24, 10/4/24, 10/5/24, 10/6/24, 10/7/24, 10/8/24, 10/9/24, 10/10/24, 10/11/24, 10/12/24, 10/13/24, 10/14/24, 10/15/24, 10/16/24, 10/17/24, 10/18/24, 10/19/24, 10/20/24, 10/21/24, 10/22/24, 10/23/24, 10/24/24, 10/25/24, 10/26/24, 10/27/24, 10/28/24, 10/29/24, 10/30/24, 10/31/24, 11/1/24, 11/2/24, 11/3/24, 11/4/24, 11/5/24, 11/6/24, 11/7/24, 11/8/24, 11/9/24, 11/10/24, 11/11/24, 11/12/24, 11/13/24, 11/14/24, 11/15/24, 11/16/24, 11/17/24, 11/18/24, 11/19/24, 11/20/24, 11/21/24, 11/22/24, 11/23/24, 11/24/24, 11/25/24, 11/26/24, 11/27/24, 11/28/24, 11/29/24, 11/30/24, 12/1/24, 12/2/24, 12/3/24, 12/4/24, 12/5/24, 12/6/24, 12/7/24, 12/8/24, 12/9/24, 12/10/24, 12/11/24, 12/12/24, 12/13/24, 12/14/24, 12/15/24, 12/16/24, 12/17/24, 12/18/24, 12/19/24, 12/20/24, 12/21/24, 12/22/24, 12/23/24, 12/24/24, 12/25/24, 12/26/24, 12/27/24, 12/28/24, 12/29/24, 12/30/24, 12/31/24.

PROPERTY CERTIFICATION MAP



PROPERTY CERTIFICATION MAP B



SECTION V – EXHIBIT B
EDGEWOOD/CANDLER PARK CHARETTE REPORT
INVEST ATLANTA FACT SHEET

EDGEWOOD/CANDLER PARK CHARETTE REPORT

(Please double click the embedded file to view the report.)



Adobe Acrobat
Document

INVEST ATLANTA FACT SHEET



Invest Atlanta Comprehensive Programs Information Sheet

Program	Description	Contact	Award Amounts	Geographic Limitations	Other Comments
<u>City of Atlanta Incentives</u>					
Economic Opportunity Fund	This discretionary fund is structured on a project by project basis based upon criteria such as job retention and creation in the city of Atlanta, financial strength of the business, and amount of business investment in the project.	Kevin Johnson	25,000 - open	City of Atlanta	Currently all funds have been pledged and therefore a request to the Mayor's office must be made for any new offers.
New Markets Tax Credits	The New Markets Tax Credit Program provides financial assistance to private-sector companies (for-profits and non-profits) seeking low-cost financing for real estate development projects that create positive targeted community benefits.	Dale Royal	dependent upon project and available allocation	30% or greater poverty; Average household income below 60% of area median income; Unemployment of 1.5x the national average	\$5 million to \$40 million is ideal range. Contact us for projects requiring less than \$5 million to determine eligibility or other options
Tax Allocation Districts	TADs are established to publicly finance certain redevelopment activities in underdeveloped areas. Redevelopment costs are financed through the pledge of future incremental increases in property taxes generated by the resulting new development.	Amanda Rhein	Varies	10 specified areas throughout the city	
Employee Recruitment and Training	The Atlanta Workforce Development Agency (AWDA) is a bureau of the City of Atlanta under the Executive Offices of the Mayor. AWDA's primary purpose is to administer employment and training programs mandated under the Workforce Investment Act (WIA) of 1998 to the citizens of Atlanta to offer workforce solution services to the metro Atlanta businesses. The AWDA can assist with employee recruitment, job fairs, customized training, and on-the-job training.	Deborah Lum	dependent upon project	City of Atlanta	
Lease Purchase Bonds	Through the issuance of lease purchase bonds, Invest Atlanta holds title to real and personal property for a ten year period. Invest Atlanta enters into a Memorandum of Agreement with the Fulton County Board of Assessors to assess the property under a ramp up schedule starting at 50% in the first year and decreasing by 5% each year for the next 9 years until full taxes are paid in year 11.	Eloisa Klementich	No limit; suggested for investments over \$10 million	Non-TAD areas	Invest Atlanta may not be able to offer this program in a Tax Allocation District ("TAD") since the TAD's rely on the property tax increment to fund their bonds.
501c3 Revenue Bonds	Issued to finance property of applicable non-profits, such as schools, charities, & healthcare facilities. Typically, aren't subject to amount limitations. Some tax-exempt Private Activity Bonds for section 501c3 orgs can be designated as "qualified" for bank purchase with full tax benefits.	Eloisa Klementich	Varies	City of Atlanta	Low interest rates, Better terms, Comprehensive fund use, no volume cap requirement, must be IRS-registered 501c3, borrower can retain accumulated funds, min debt standard
Industrial Revenue Bonds (IRB)	Long-term, low-interest, below-market financing for construction of or improvements to manufacturing facilities. Either structured as public sales in the nation's bond markets or sold as private placements with interested investors. Interest rate may be fixed or variable.	Eloisa Klementich	Up to \$10 million for each eligible project	State and Local requirements	Comprehensive use of funds, tax-exempt bonds
Clean Energy Atlanta	Low-cost financing to reduce energy and water consumption in commercial or multi-family buildings. Program provides upfront funding for energy improvements, renewable energy installations and water conservation.	Dale Royal	Minimum \$5,000, Maximum is 10% of building's market value	New Clean Energy District, staff can assist with map	Property Assessed Clean Energy (PACE) Financing is repaid over 20 years in annual installments along with property tax

<u>Small Business Loans</u>	Invest Atlanta offers a variety of small business loan programs headed by Lonnie Saboor				
Business Improvement Loan Fund	Encourage the revitalization of targeted business districts to support development	Lonnie Saboor	Direct Loans up to \$50,000	Business Improvement Districts	Requirement 20% of equity injection
Phoenix Fund	Provides small and medium sized business with affordable loans	Lonnie Saboor	The Phoenix Fund provides loans ranging from \$10,000 - \$100,000 for 3 to 7 years and ½ of prime plus 2%		Must create 1 job for each \$15,000 loaned
Opportunity Loan Fund	The Opportunity Loan Fund provides gap financing	Lonnie Saboor	from \$100,000 - \$200,000 for 3 to 7 years at ½ of prime plus 2%		
Empowerment Zone Program	Stimulate economic development in Empowerment Zone through direct loans	Lonnie Saboor	\$50-200,000		
Atlanta Catalyst Fund	Direct business loans for operating capital or real estate improvements	Lonnie Saboor	\$50-\$100,000	Census tracts with 20% or greater poverty	Loans are 3 to 7 years with below market interest rates
SBA 504 Loan Program	Offers financial and technical assistance to small, minority and female owned businesses relocating or expanding in the City	Lonnie Saboor	\$4 million for a maximum term of 20 years at an interest rate based on a 10-year Treasury note.		Create or retain 1 job for each \$50,000 loaned

Home Loans	Invest Atlanta offers a variety of home loan and grant programs headed by Dawn Luke				
Opportunity Down payment Assistance Program	The "Opportunity Downpayment Assistance Program (ODAP)" provides homebuyers with downpayment assistance of 5% of the sales price at 0% interest rate as a soft second mortgage.	Dawn Luke	5% of sales price (max sales price of \$252,800)	Incorporated City Limits of Atlanta	Funds can be used for purchase of primary residence only. Maximum family income for 1 to 2 people is \$68,300; for 3 or more \$78,545. Property can be a Single family detached home, townhome, or condominium.
BeltLine Affordable Housing Trust Fund	Grants are available to multifamily, single family and CHDO developers from the BeltLine Affordable Housing Trust Fund to finance multifamily and single family developments along the BeltLine. Grant funds may be used to finance acquisition, construction or renovation of multifamily and single family housing for families at or below 60% of Area Median Income (Multifamily Rental) and 100-115% (Single Family Homeownership). These grants to developers are enforced by a Land Use Restriction Agreement (LURA).	Dawn Luke	The total amount of the grant dollars may not exceed 30% (35% for CHDOs) of the total development costs.	Within the BeltLine tax allocation district	For Single Family, funds can be used for purchase of primary residence only. Maximum family income for 1 to 2 people is \$68,300; for 3 or more \$78,545. Property can be a Single family detached home, townhome, or condominium. (max sales price of \$252,800)
Atlanta Affordable Housing Opportunity Program	The Atlanta Affordable Housing Opportunity Program (AAHOP) provides first time homebuyers with downpayment assistance of \$10,000 as a soft second lien. This program can be layered with other down payment assistance programs provided by Invest Atlanta. The Atlanta Affordable Homeownership Program provides \$10,000 mortgage assistance in form of a zero-percent interest rate soft second mortgage and covers up to 50 percent of the settlement costs.	Dawn Luke	\$10,000 (max sales price of \$252,800)	Incorporated City Limits of Atlanta	Funds can be used for purchase of primary residence only. Maximum family income for 1 to 2 people is \$68,300; for 3 or more \$78,545. Property can be a Single family detached home, townhome, or condominium.
Vine City English Avenue Trust Fund (Homeownership Assistance Program - HOAP)	The Vine City/English Avenue Trust Fund (HOAP) provides a zero-percent interest rate loan of up to 10 percent of purchase price, not to exceed \$15,000. There is no maximum purchase price.			The property must be located within the Trust Fund Program boundaries: Joseph Lowery Blvd. on the west; Donald Hollowell Pkwy on the north; Northside Drive on the east; Martin Luther King Jr. Drive on the south. (incorporated limits of Atlanta)	Funds can be used for purchase of primary residence only. Maximum family income for 1 to 2 people is \$68,300; for 3 or more \$78,545. Property can be a Single family detached home, townhome, or condominium.
Housing Opportunity Bond	Low interest loans are available to finance multifamily developments in the City of Atlanta that have at least 20% of the units set aside for individuals at 60% of the Area Median Income. Funds may be used to finance acquisition, construction or renovation. These loans to developers are enforced by a Land Use Restriction Agreement (LURA).	Dawn Luke	The total amount of the loan may not exceed 20% of the total development costs.	Atlanta	
Tax Exempt Bonds	Tax Exempt Bonds may be issued to finance multifamily developments in the City of Atlanta that have at least 20% of the units set aside for individuals at 50% of the Area Median Income or 40% of the units set aside at 60% of the Area Median Income. We recommend this financing tool for projects of 75 units or more. Funds may be used to finance acquisition, construction or renovation. These bonds must be enhanced by a third party or sold via a private placement and restrictions regarding affordability are evidenced by a Land Use Restriction Agreement (LURA).	Dawn Luke	The bond financing must be greater than 50% of the overall eligible development costs. Financing can be as high as 100% if the project can support the debt payments.	City of Atlanta	
Home Investment Partnerships Program	Low interest loans are available to finance multifamily developments in the City of Atlanta that have at least 20% of the units set aside for individuals at 50% of the Area Median Income. Funds may be used to finance acquisition, construction or renovation. These loans to developers are enforced by a Land Use Restriction Agreement (LURA).	Dawn Luke	The total amount of the loan may not exceed 50% of the total development costs.	City of Atlanta	

State and Partner Incentives					
Less Developed Census Tracts & Opportunity Zones	The city of Atlanta has several locations in "less developed census tracts" and Opportunity Zones. Qualified businesses locating in a less developed census tract are eligible to receive a \$1,750 per employee credit against state corporate income taxes for 5 years. Any legal business locating in an Opportunity Zone receives a \$3,500 per employee credit against state corporate income taxes for 5 years.	Dawn Sturbaum	Up to \$3,500 per job per year for 5 years Total of \$17,500 per job No maximum amount	Specific Geographic Areas	Both of these credits may also be taken against a company's income tax withholding once the company's income tax liability has been met for that calendar year.
Regional Economic Business Assistance (REBA)	REBA is a job creation incentive program run by the State of Georgia to encourage business relocation into the State of Georgia.	Dawn Sturbaum	Recommended by GDEcD	Statewide	
Training Incentives		Invest Atlanta works closely with the state in delivering multiple training incentives to applicable businesses			
Quick Start	In addition to the AWDA, the State of Georgia offers the Quick Start program that develops and delivers customized training at no charge to eligible new, expanding and existing companies. These two organizations can work together to provide a comprehensive workforce development program for the company. A more detailed explanation of assistance can be provided by AWDA at a later date.	Rodger Brown	dependent upon project	Statewide	
Georgia's Intellectual Capital Partnership Program (ICAPP)	The University System of Georgia's economic development program. Connects the intellectual resources of Georgia's 35 public colleges and universities to the statewide business community. Affords businesses access to college-educated employees, latest research, and business and/or operations advice.	Greg King	Non-Monetary	Statewide	
HOPE Scholarship and Grant	Tuition assistance at one of Georgia's 35 public colleges and universities for graduating Georgia high school seniors with a B or better average. Available for degree or certification programs, including those of Georgia's technical colleges and schools.		Varies	Statewide	
Hiring Assistance	Georgia's Department of Labor (GDOL) assists companies in recruitment by posting job notices, collecting/screening applications and/or resumes. Providing interview space, scheduling interviews, and hosting job fairs. GDOL will work with private employment agencies that list jobs with the state.		Non-Monetary	Statewide	
Retraining Tax Credit	All Georgia businesses that file a Georgia income tax return and directly invest in retraining are eligible for tax credits. Must be approved by the Technical College System of Georgia. Must be for quality, productivity, and/or certain software technologies. Can be used to offset up to 50% of a company's state income tax liability, unused amounts can be carried forward 10 years and combined with other tax credits		50% of employers direct cost up to \$500 per FT employee per approved training program / \$1,250 per employee, per annum	Statewide	

<u>Small Business & Entrepreneur Assistance</u>		<u>Invest Atlanta works closely with the state to meet the needs of area small businesses and entrepreneurs</u>			
Angel Investor Tax Credit	Income tax credits for qualified investors that invest in certain qualified Georgia businesses in Calendar years 2011, 2012, and 2013. Qualified investors must gain approval from the GA Department of Revenue before claiming the credit. Credit can be claimed 2 years after, 2013, 2014, and 2015 respectively.		Credits are 35% of investment with an individual investor cap of \$50,000 per year. The aggregate annual cap is \$10 million.	Statewide	
Small Business Tax Relief	Small Business Capital investments under \$410,000 can have \$102,000 of those expense written-off. Investments greater than \$410,000 have the write-offs reduced dollar for dollar.		Varies	Statewide	
<u>Existing Industry Assistance</u>		<u>Invest Atlanta maintains contact with businesses, helping to resolve issues existing industries face.</u>			
Investment Tax Credit	Existing manufacturing or telecommunications support facilities having operated for at least 3 years and making capital investments of \$50,000 are eligible. Taxpayers must choose between this or job tax credit. May be applied against 50% of state corp income tax liability and carried forward 10 years		1-5% of direct new investment. (3-8% for recycling, pollution control equipment & a new product conversion of defense manufacture plant)	Statewide	
Optional Investment Tax Credit	Offered in lieu of the Investment Tax Credit. Minimum investment range \$5-20 million. Taxpayer can use the tax credit up to the calculated amount for a given year. Can be claimed up to 10 years after property was first placed in service, providing it remains in service. Is a calculated risk since without large increases yearly the tax credit could be small or even zero.		6-10% of qualified capital investments	Statewide	
Centers of Innovation	Tech-oriented support within the areas of Aerospace, Agribusiness, Energy, Life Sciences, Logistics, & Advanced Manufacturing with direct access to university and technical college applied research, commercialization resources, technology connections, matching grant funds, potential investor networks, and key government agencies.		Non-Monetary	Statewide	
Georgia Film Tax Credit	Across-the-board 20% flat tax credit on minimum qualified Georgia production investments of \$500,000. (Eligible productions: feature films, pilots, series, commercials, TV movies, music videos, & certain interactive projects including types of animation, special effects, & video game development) A 10% uplift can be earned for imbedding animated GA logo on approved projects. The minimum threshold can be met with one or more projects aggregated. Tax credit can be applied toward GA income tax liability or withholdings. A one-time sale or transfer of the credit to one or more GA taxpayers is allowed.		Across the board flat tax credit of 20%. Additional 10% uplift for imbedding animated Georgia logo on approved projects	Statewide	

Corporate Tax Credits		Invest Atlanta works with local businesses to fully utilize available state corporate tax credits			
Job Tax Credit	Companies and their HQ engaged in strategic industries, Including: manufacturing, warehousing & distribution, processing, telecommunications, broadcasting, tourism, and R&D may be eligible. Depending upon the community tier, 5-25 net new FT jobs would need to be created in the first year. additional jobs created in years 2-5 may accrue additional credits.		\$750-3,500 per job, per year, for 5 years (unless a new job creation threshold is reached)	Statewide	Credits can be used against 50-100% of tax liability depending upon the tier and can be carried forward for 10 years.
Quality Jobs Tax Credit	Creation of at least 50 job in a 12 month period by a company. New quality jobs created within seven years can qualify. Credits can be used to offset payroll withholdings once all other tax liability has been exhausted. Credits can be carried forward 10 years.		\$2,500-5,000 per job, per year, up to 5 years	Statewide	
Research & Development	New & existing businesses performing qualified Research & Development in Georgia are eligible. The credit is applicable to 50% of the company's net tax liability after all other credits have been applied. Any excess can be applied to state payroll withholdings. Credits can be carried forward 10 years		10% tax credit of increased R&D expenses subject to base amount calculation	Statewide	For new companies the base amount is 30%. For existing it is 0.300 or the current year GA gross receipts x (the average of the ratios of qualified GA research expenses to GA gross receipts for the preceding 3 taxable years), whichever is less.
Mega Project Tax Credit	companies that employ at least 1,800 net new employees and either invest at least \$450 million or have a minimum annual payroll of \$150 million are eligible.		\$5,250 per job, per year for five years	Statewide	The credit is applied to tax liability. Any excess can be applied to state payroll withholdings. Credits can be carried forward 10 years
Child Care Tax Credits (Purchase or Build)	Employers who purchase or build qualified child care facilities are eligible. Credits are applied to GA state income taxes.		100% of cost of construction (credited over 10 years)	Statewide	Unused credits can be carried forward 3 years. Facility must be state licensed
Child Care Tax Credits (Provide or Sponsor)	Employers who provide or sponsor child care are eligible for additional credits. Direct costs of providing/sponsoring services are credited at 75%. Credits are applied to 50% of GA state income taxes in a given year.		75% of direct costs	Statewide	Unused credits can be carried forward 5 years. Facility must be state licensed
Work Opportunity Tax Credit Program (WOTC)	GDOL coordinates the WOTC provided by the U.S. Congress to private-sector businesses for hiring individuals within 9 target groups. Credit is used to reduce federal income tax liabilities.		\$1,200 - \$9,000 per qualified employee, depending upon group	Statewide	Employer must request & receive certification from GDOL that new hire is of a targeted group before claiming credit
Port Tax Credit Bonus	Available to taxpayers that increase imports or exports through a Georgia port by 10% over previous or base year. Base year port traffic must be at least 75 net tons, 5 containers, or 10 TEUs, if not the previous amounts will be used as the base. Can be combined with JOB or investment tax credit programs. Credits can be used to offset up to 50% of income tax liability. unused amounts can be carried forward 10 years, as long as previous requirements continue to be satisfied.		JOB-\$1,250 per job created. INVESTMENT-5-8% depending upon sector.	Statewide	
Tax Exemptions		Invest Atlanta strives to secure as many tax exemptions as possible for applicable companies			
Sales and Use Tax Exemption	Qualified purchases or leases are exempt from sales tax if purchased for use in manufacturing. Under certain conditions, primary material handling equipment (in warehouse & distribution centers), computer equipment and Class 100 (or less) clean room machinery, equipment and materials can also be exempted		Varies	Statewide	
Inventory Tax Exemption	Business inventory is exempt from state property taxes		Varies	Statewide	
Foreign-Trade Zone (FTZ)	Qualified companies are allowed to defer, decrease, or eliminate duties on materials imported from overseas used in products assembled within Georgia.		Varies	Statewide	

SECTION VI – CERTIFICATIONS and FORMS

CONTRACTOR AFFIDAVIT UNDER O.C.G.A §13-10-91(b)(1)

By executing this affidavit, the undersigned Contractor verifies its compliance with O.C.G.A. §13-10-91, et seq. (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services on behalf of Invest Atlanta: (1) has registered with; (2) is authorized to use; (3) is using; and (4) will continue to use throughout the contract period a federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicability provisions and deadlines established in the Act and the Rules.

The undersigned contractor further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to the contract with Invest Atlanta of which this affidavit is a part, the undersigned contractor will secure from such subcontractor(s) similar verification of compliance with the Act and the Rules through the subcontractor's execution of the subcontractor affidavit provided below.

The undersigned contractor further agrees to provide a copy of each such affidavit to Invest Atlanta at the time the subcontractor(s) is retained to perform such services and to maintain copies of all such affidavits for no less than five (5) years from the date provided to Invest Atlanta and otherwise maintain records of compliance with the Act and the Rules as required.

Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

_____	_____
Employment Eligibility Verification (E-Verify)	Date of Authorization
User Identification Number	

I hereby declare under penalty of perjury that the foregoing is true and correct.

_____	_____
BY: Authorized Officer or Agent	Date

Subcontractor Name

Title of Authorized Officer or Agent of Subcontractor

Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me
This ___ day of _____, 201__

Notary Public

My commission expires: _____

SUBCONTRACTOR AFFIDAVIT UNDER O.C.G.A §13-10-91(b)(3)

By executing this affidavit, the undersigned subcontractor verifies its compliance with O.C.G.A. § 13-10-91 (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services under a contract with _____ (name of contractor) on behalf of Invest Atlanta: (1) has registered with; (2) is authorized to use; (3) is using; and (4) will continue to use throughout the contract period a federal work authorization program known as E-Verify, or any subsequent replacement program, in accordance with the applicability provisions and deadlines established in the Act and the Rules.

The undersigned subcontractor further agrees that it will contract for the physical performance of services in satisfaction of the Contract only with sub-subcontractors who present an E-Verify Affidavit to the undersigned subcontractor with the information required by the Act and the Rules. The undersigned subcontractor will forward notice of the receipt of an E-Verify Affidavit from a sub-subcontractor to the Contractor within five (5) business days of receipt. If the undersigned subcontractor receives notice that a sub-subcontractor has received an a E-Verify Affidavit from any other contracted sub-subcontractor, the undersigned subcontractor must forward, within five (5) business days of receipt, a copy of the notice to the Contractor.

Subcontractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

Employment Eligibility Verification (E-Verify) Date of Authorization
User Identification Number

I hereby declare under penalty of perjury that the foregoing is true and correct.

BY: Authorized Officer or Agent Date

Subcontractor Name

Title of Authorized Officer or Agent of Subcontractor

Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me
This ____ day of _____, 201__

Notary Public

My commission expires: _____

SAVE AFFIDAVIT IN ACCORDANCE WITH O.C.G.A §50-36-1(e)(2)
INVEST ATLANTA AFFIDAVIT
VERIFYING STATUS FOR RECEIPT OF PUBLIC BENEFIT

By executing this affidavit under oath, as an applicant for a contract with Invest Atlanta, or other public benefit as provided by O.C.G.A. §50-36-1, and determined by the Attorney General of Georgia in accordance therewith, I state the following with respect to my application for a public benefit from Invest Atlanta:

For: _____.

[Name of natural person applying on behalf of individual, business, corporation, partnership, or other private entity]

1) _____ I am a United States Citizen

OR

2) _____ I am a legal permanent resident 18 years of age or older or

OR

3) _____ I am an otherwise qualified alien or non-immigrant under the Federal Immigration and Nationality Act 18 years of age or older and lawfully present in the United States.

All non-citizens must provide their Alien Registration Number below.

Alien Registration number for non-citizens

The undersigned applicant also hereby verifies that he or she has provided at least one secure and verifiable document as required by O.C.G.A. §50-36-1(e)(1) with this Affidavit. **The secure and verifiable document provided with this affidavit is:**

In making the above representation under oath, I understand that any person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall be guilty of a violation of O.C.G.A. §16-10-20, and face criminal penalties as allowed by such criminal statute

Signature of Applicant

Date: _____

Printed Name:

Sworn to and subscribed before me
This ____ day of _____, 201__

Notary Public

My commission expires: _____