

ECONOMIC DEVELOPMENT STRATEGIC ACTION PLAN (RFP #2024059)

A PROPOSAL FOR INDIAN RIVER COUNTY, FLORIDA
DUE AUGUST 1, 2024, 2:00 PM LOCAL



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TIP is an Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm’s core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

A. COVER LETTER

July 30, 2024

Indian River County Purchasing Division
1800 27th Street, B1-303
Vero Beach, FL 32960

To Whom It May Concern:

TIP Strategies is pleased to present our proposal for the preparation of an economic development strategic action plan for Indian River County. As you evaluate proposals, we invite you to consider the advantages of our team:

- ▶ **WE HAVE A LONG HISTORY OF SUCCESSFUL PLANNING ENGAGEMENTS IN FLORIDA.** Since 1995, we have completed more than 550 engagements in 44 states and 5 countries. We are currently preparing a talent study for the seven-county northeast Florida region served by the JAXUSA Partnership, having previously completed a strategic plan for the region. Other recent work in the state includes an economic development strategy for the Miami-Dade Beacon Council, a comprehensive strategic plan for Pinellas County, a talent strategy for the Tampa Bay Partnership, an organizationally focused action plan for the Tampa Bay Economic Development Council, and a target industry analysis for the City of North Miami.
- ▶ **WE HAVE AN EXTENSIVE PORTFOLIO OF COUNTY-LEVEL WORK.** Crafting strategies for a county often requires an understanding of the differing needs of urban, suburban, and rural areas. Bringing these diverse interests together is a cornerstone of our approach. In addition to our Florida work, TIP's recent county-level engagements include preparing an organizationally focused economic strategy for the Greenville Area Development Corporation (South Carolina); standing up an office of economic opportunity and diversity in Harris County, Texas; and preparing a marketing and economic strategy for Charleston County, South Carolina.
- ▶ **WE UNDERSTAND THE IMPORTANCE OF A ROBUST TOURISM PROGRAM.** The TIP team is adept at aligning tourism promotion and sustainable economic strategies. We have crafted economic development plans for numerous communities that rely on revenue from tourism and related sectors. Those clients include Sun Valley, Idaho (Blaine County); Corpus Christi, Texas; Hot Springs, Arkansas; and Northwest Florida.
- ▶ **WE ARE THOUGHT LEADERS IN ECONOMIC DEVELOPMENT.** TIP has been on the cutting edge of the practice of economic development for almost 30 years. Our principals bring a broad base of experience that includes running state and regional economic development programs, managing international trade efforts, and participating in venture capital initiatives.

Although I am serving as the authorized representative of the firm for the purposes of this response, TIP senior partner Jeff Marcell will be the principal-in-charge and primary point of contact for the project. If you have any questions, please reach out to him at 512.343.9113 or jeff@tipstrategies.com. Our team is excited by the prospect of working with you, and we appreciate the opportunity to present our firm.

Sincerely,



Tom Stellman, Founder and CEO

B. FIRM INFORMATION FORM

2024059 RFP for EDSAP

FIRM INFORMATION FORM

Communications concerning this proposal shall be addressed to:

Company Name	TIP Strategies, Inc.		
Tax ID Number	74-2762692	W-9	Attached <input checked="" type="checkbox"/>
Contact Name	Tom Stellman	Phone	512-343-9113
Title	CEO and Founder	Email	tom@tipstrategies.com
Address	13492 N Hwy 183, Suite 120-254, Austin, TX 78750		

The following addenda are hereby acknowledged:

Addendum Number	Date
<u>1</u>	<u>07/23/2024</u>
_____	_____
_____	_____
_____	_____

1. Date Registered with e-Verify.gov: 10/11/2011 Certificate #456029

2. List all ligation cases during the past three (3) years in which the Consultant has been a named party. Use additional sheets, as necessary. NOT APPLICABLE; N/A

Year filed	Case number	Venue	Description

Request for Taxpayer Identification Number and Certification

Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
 requester. Do not
 send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See <i>Specific Instructions</i> on page 3.	<p>1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)</p> <p>TIP Strategies, Inc.</p>	
	<p>2 Business name/disregarded entity name, if different from above.</p>	
	<p>3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor <input checked="" type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____</p> <p>Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) _____</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____</p> <p style="text-align: right;"><i>(Applies to accounts maintained outside the United States.)</i></p>
	<p>3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/></p>	
	<p>5 Address (number, street, and apt. or suite no.). See instructions.</p> <p>13492 N Hwy 183 Ste 120-254</p>	<p>Requester's name and address (optional)</p>
	<p>6 City, state, and ZIP code</p> <p>Austin, TX 78750</p>	
	<p>7 List account number(s) here (optional)</p>	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
or									
Employer identification number									
7	4		2	7	6	2	6	9	2

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	Date
		6-6-2024

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

C. COMPANY PROFILE

TIP Strategies, Inc. (TIP) is submitting this proposal to assist Indian River County (County) with an economic development strategic action plan. Our team members are experienced in 1) leading economic development planning projects across the US and internationally; 2) structuring effective and sustainable organizations; 3) identifying appropriate target industries and designing effective marketing strategies to recruit them; 4) crafting talent retention, development, and attraction strategies; and 5) assisting with the implementation of economic development plans for cities, counties, regions, and states.

OUR FIRM

TIP is an independently owned Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives. Community leaders across the US have embraced the TIP Talent-Innovation-Place framework to develop innovative publicly supported strategies that establish a clear vision for sustainable economic growth and shared prosperity. Representative clients include:

- ▶ Florida's Great Northwest (with Haas Center at the University of West Florida) – Northwest Florida Forward
- ▶ Tampa Hillsborough Economic Development Corporation (FL) – Economic Development Strategic Plan
- ▶ Tampa Bay Partnership (FL) – Employer-Led Regional Workforce Initiative
- ▶ JAXUSA Partnership (FL) – The Future Is Now—Northeast Florida
- ▶ Saratoga County, NY – Economic Development Strategic Plan
- ▶ Travis County, TX – Economic Development Strategic Plan
- ▶ Pearl River County, MS – Economic Development Strategic Plan
- ▶ Asheville-Buncombe County, NC – AVL 5x5 Vision 2020
- ▶ Calhoun County Chamber (AL) – Workforce Retention and Economic Strategy
- ▶ Jackson County Economic Development Foundation (MS) – Strategic Innovation Plan
- ▶ Delaware Prosperity Partnership – Strategic Operations Plan; Delaware Growth Agenda
- ▶ National League of Cities/Mid-American Regional Council (MO/KS) – Regional Housing Summit
- ▶ Greater Houston Partnership, TX – Addressing Houston's Middle Skills Job Challenge
- ▶ City of Las Vegas and Clark County, NV – Comprehensive Economic Development Strategy (CEDS)
- ▶ Greater Green Bay Chamber (WI) – Economic Development Strategic Plan
- ▶ Greater MSP (Minneapolis-St. Paul, MN) – Center Cities Economic Development Playbook
- ▶ Oregon Talent Council – Oregon Talent Report
- ▶ Northwest Indiana Forum – Ignite the Region: Economic Transformation Strategy
- ▶ Capital Area Workforce Board (Austin, TX) – Master Community Workforce Plan



From the outset, TIP delivered on the promise of their proposal and their interview. They helped us understand national trends and how they could impact our efforts...

David N. Sciocchetti
Project Lead (former), VISTA 2025
Chester County EDC (PA)



1995

YEAR FOUNDED

550+

ENGAGEMENTS

400+

CLIENTS

44

STATES

5

COUNTRIES

OUR LEADERSHIP

TIP is led by four principals who are ideally suited to assist the County with economic development strategic action planning. They are joined by a staff of fulltime analysts, consultants, and production professionals experienced in managing projects similar in scope to the requested work. The TIP team also includes an extensive network of associates and partners whose multidisciplinary skills can be brought to bear on this project. Our principals have spent decades—first as practitioners, then as consultants—building relationships. Hiring TIP as your strategic partner brings access to a global brain trust of specialists and thought leaders.

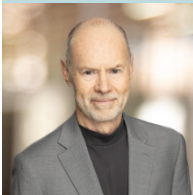


TOM STELLMAN | CEO/FOUNDER

Tom brings a wealth of experience working with communities and businesses. As developer of TIP's model of Talent, Innovation, and Place, he has helped clients identify sustainable strategies to promote workforce and economic health.

TRACYE MCDANIEL | PRESIDENT

As a widely recognized strategist with experience in all facets of economic development and travel marketing, Tracye has earned a reputation for creating mutually beneficial partnerships across a broad spectrum of industries.

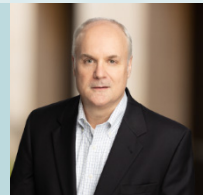


JON ROBERTS | MANAGING PARTNER

Jon is a nationally recognized leader in regional economic development. He has overseen projects throughout the US, as well as in Europe and Asia, and is a frequent speaker for the International Economic Development Council.

JEFF MARCELL | SENIOR PARTNER

Jeff leads high-profile national consulting engagements and provides input from the practitioner's point of view. Prior to joining the firm, he spent a decade leading the Economic Development Council of Seattle and King County.



OUR ADVANTAGE

TIP's national portfolio of consulting engagements spanning more than two decades, combined with hands-on program management experience, provides our team with a unique perspective.

- ▶ **WE HAVE PROVEN EXPERIENCE IN FLORIDA.** We have a history of successful consulting engagements in the state of Florida. In addition to our current engagement with the JAXUSA Partnership, we also recently prepared an economic development strategic plan for the Miami-Dade Beacon Council. Our other work in the state includes a comprehensive economic development strategic plan for Pinellas County, a talent strategy for the Tampa Bay Partnership, an organizationally focused action plan for the Tampa Bay Economic Development Council (formerly the Tampa Hillsborough Economic Development Council), and a target industry analysis for the City of North Miami. TIP also led an economic development strategy planning process for the City of Clearwater in 2011 and assisted the Ocala-Marion County Economic Development Corporation with an action plan in 2012. Previous engagements also include work for Lake, Walton, and Escambia Counties.



Not only did [TIP] meet our expectations during the project period, we continue to call upon them as we move through implementation ...Our experience with them has set a standard we hope can be met by other consulting firms.

John Lawler, Chairman (former)
Saratoga County Prosperity
Partnership (NY)



▶ **WE KNOW HOW TO NAVIGATE COUNTY DYNAMICS.** We have an extensive history of collaborative county-level economic development strategies that bring together the diverse needs of urban, suburban, and rural areas. For example, TIP worked with Oakland County, Michigan, on a plan to build on its asset base and position itself in the region. Our plan for the Racine County Economic Development Corporation (Wisconsin), was used to guide county economic development for more than a decade. The resolution of a wastewater agreement stemming from the planning process opened up land for development. Other county-level engagements include:

- ▶ **Southeast. FL:** Hillsborough, Miami-Dade, Escambia, Walton, Ocala, Lake; **NC:** Buncombe; **SC:** Charleston, Greenville, Richland, McCormick; **GA:** Forsyth; **MS:** Jackson, Pearl River, Hinds, Claiborne; **LA:** Jefferson Parish.
- ▶ **Southwest. TX:** Bexar, Travis, Harris, Fort Bend, Gregg, Morris, Angelina; **NV:** Clark; **CA:** Kern, San Luis Obispo, Santa Barbara.
- ▶ **Northeast. NY:** Saratoga, Tompkins; **MD:** Montgomery; **PA:** Chester, York; **RI:** Newport.
- ▶ **Midwest. WI:** Brown, Kenosha, Walworth; **IL:** Lake, Grundy, Jackson; **MO:** Iron.
- ▶ **Pacific Northwest. WA:** Clark, Lewis, Klickitat, Kittitas; **ID:** Blaine.

▶ **WE UNDERSTAND THE IMPORTANCE OF A ROBUST TOURISM PROGRAM.** The tourism industry is a fiercely competitive market that requires innovative thinking. The TIP team is adept at helping communities see the linkages between tourism promotion and sustainable economic strategies. We have crafted economic development plans for numerous communities that rely on revenue from tourism and related sectors. Those clients include Sun Valley, Idaho (Blaine County); Corpus Christi, Texas; Hot Springs, Arkansas; Southern Oregon (SORED); and Northwest Florida. Tracye McDaniel, TIP president and strategic advisor to the project, has extensive tourism and business attraction experience. As Director of the Texas Tourism Agency, she managed major marketing campaigns, including “Texas: It’s Like a Whole Other Country.” Jon Roberts has worked with Tim McClure of GSD&M (“Don’t Mess with Texas”) on the state’s workforce development marketing initiatives.

▶ **WE HELP CLIENTS CREATE EQUITABLE STRATEGIES.** Resilient communities are inclusive and design actions and policies with under-resourced populations at the center. TIP’s portfolio speaks to our commitment to equitable economic development practices. Our firm is currently helping the City of Dallas, Texas, establish a stand-alone organization to lead inclusive economic development, with a focus on redeveloping historically under-resourced South Dallas. We also recently prepared strategies for Greater Fort Wayne, Inc. (Indiana) to grow sustainable, long-term investments in historically underserved areas of the city. Our other work includes crafting an inclusive growth analysis focused on traded sectors for the Chicago Metropolitan Agency for Planning (Illinois); standing up a Department of Economic Equity and Opportunity for Harris County, Texas; creating an inclusive recovery framework for the City of Fort Collins, Colorado; preparing an inclusive tech talent pipeline strategy for the Delaware Prosperity Partnership; and assisting Detroit-area (Michigan) foundations in the creation of a funders collaborative.

▶ **WE ARE EXPERIENCED FACILITATORS.** Our team has decades of experience engaging stakeholders in-person and virtually. TIP’s projects are typically guided by leadership teams comprised of representatives from multiple jurisdictions and areas of interest, including business, economic development, higher education, and workforce. We have extensive experience balancing competing interests and identifying shared goals using several mechanisms.

- ▶ **Stakeholder task forces.** Our work on middle skills for the Greater Houston Partnership (Texas) focused on facilitating a task force of more than 100 members that included executives from the region’s employers, such as JP Morgan Chase, ExxonMobil, and AT&T. Our defense industry adjustment work for MassDev was guided by an advisory committee comprised of prime defense contractors, including Raytheon and Triton.



[TIP] worked collaboratively with our CEOs and stakeholders throughout Delaware to ensure that the end product – the Delaware Growth Agenda – was not only data-driven and substantive, but politically sensitive and respectful to the varied interests in our state. The result was a plan that was on time, on budget and on point.

Bob Perkins, Executive Director
Delaware Business Roundtable



- ▶ **Private-sector experience.** Our team has engaged thousands of employers and business organizations representing every sector of the economy through personal interviews, focus groups, and online surveys. For example, our survey of employers for the Jefferson Parish Economic Development Commission (Louisiana) drew 244 responses that identified talent gaps, hard-to-fill jobs, and potential strategies.
- ▶ **Listening sessions.** As part of our work for the Delta Regional Authority, we held listening sessions in each of the DRA's eight member states to inform the agency's regional development plan and help ensure the alignment of strategies with state level activities and priorities.
- ▶ **Public engagement.** We conducted an extensive outreach process for the North Iowa Corridor Economic Development Corporation that was credited with catalyzing positive change, including public approval of bond initiatives. TIP recently gathered data from more than 1,000 community survey responses during the creation of a comprehensive economic development strategy for Greater Spokane, Inc. (Washington).
- ▶ **WE KNOW THE FACTORS THAT DRIVE RECRUITMENT AND INVESTMENT.** Helping clients identify catalyst projects and capitalize on their assets is an integral component of our planning model. TIP's experience extends from laying the groundwork for innovation districts (including planned districts in Fort Worth and San Antonio, Texas, to leverage medical technologies and cybersecurity assets, respectively) to supporting Dallas, Texas, with the analysis and promotion of their Opportunity Zones and facilitating the development of co-working spaces in Green Bay and Wausau, Wisconsin.
- ▶ **WE HAVE A TEAM OF EXPERIENCED ANALYSTS.** Our research team is well-versed in analytical techniques and finding innovative approaches to provide clients with the information they need for decision-making. TIP's lead analyst has three decades of experience using public and proprietary data sets to create clear and compelling industry, occupational, and market analyses. He has also overseen the development of our widely cited data visualization tools, featured on our website: <https://tipstrategies.com/visualizations/>.
- ▶ **WE HELP OUR CLIENTS ACHIEVE RESULTS.** Success metrics guide our planning process and form the basis of our implementation plans and workshops. We work with clients to identify metrics and determine if strategies are working or need adjustment. We can point to numerous examples of clients that have successfully implemented recommendations. For instance, the City of Auburn, Washington, has expanded and attracted aerospace and advanced manufacturing businesses, and the Lubbock Economic Development Alliance has made progress tapping into research and innovation assets at Texas Tech University and developing its downtown. Additionally, the Northeast Indiana Regional Development Authority was awarded the maximum \$50 million in state funding in 2021 based on the plan we created for the 11-county region.
- ▶ **WE BRING A PRACTITIONER'S PERSPECTIVE TO OUR WORK.** Our team members have spent decades first as practitioners, then as consultants, helping organizations across the country identify and attract well-suited target industries. We understand the factors that drive successful economies. Our approach recognizes that investment decisions consider many factors, including the available workforce, the presence of well-prepared sites, a climate that fosters innovation, and a quality of place that will support the retention and recruitment of talent. For nearly 30 years, TIP's engagements have been guided by this Talent-Innovation-Place framework. Our team's experience working with cities, counties, regions, and states underscores the benefits of a holistic approach and confirms our view that economic vitality is irrevocably connected to the ability to influence these three key factors.



[TIP] worked diligently for our city. Their work was comprehensive and very instrumental for the future of our city. TIP helped us put our plan in writing and set us on a course to achieve our goals.

M. Kevin Strength, former Mayor
City of Waxahachie, Texas



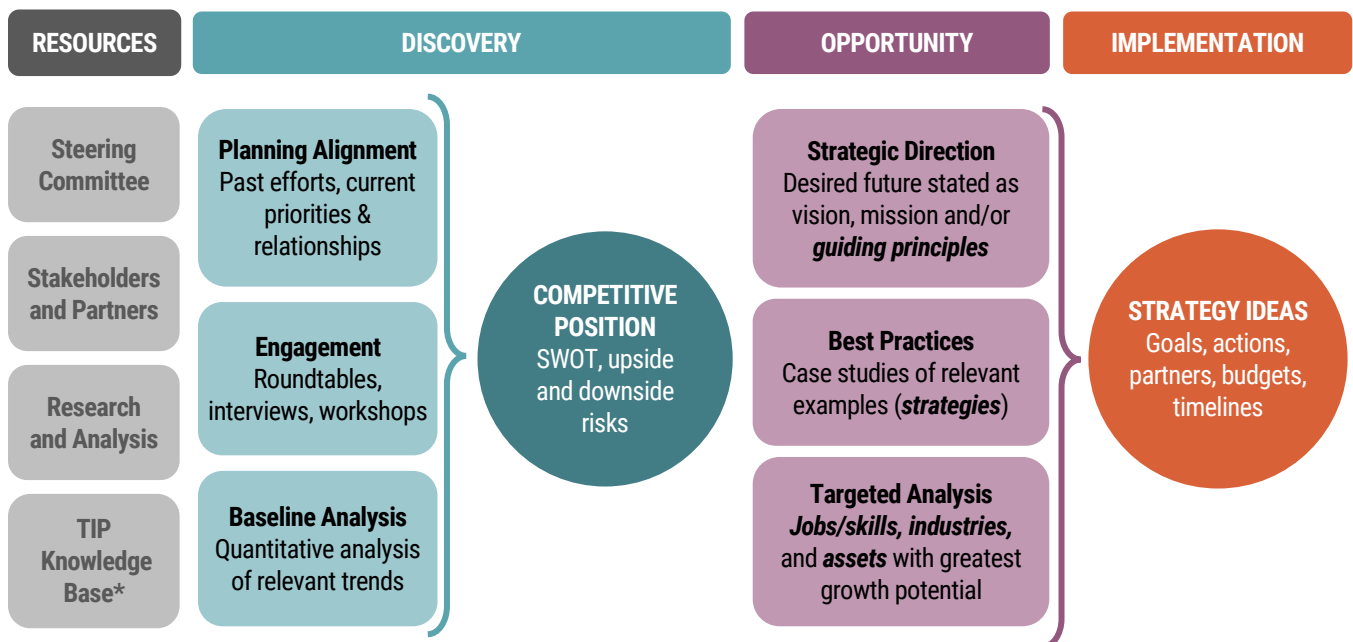
In short, our team has the capability, creativity, and commitment to get it right. Hiring TIP to lead your strategy process will result in 1) a shared vision for economic resilience; 2) clear strategies to support the vision; and 3) an actionable plan for moving forward.

D. PROJECT METHODOLOGY

We have an established approach to our strategic planning engagements. In our years of leading consulting projects across the country, our three-phase Theory Into Practice (TIP) planning model—Discovery, Opportunity, Implementation—has proven flexible enough to address the variety of challenges our clients face and aligns well with the requested scope and deliverables. The Discovery phase reflects our interest in learning what makes a community or region unique. By its very name, the Opportunity phase ensures a focus on identifying the big ideas that will contribute to the community’s economic vitality and garner widespread support for the planning process. Finally, the Implementation phase keeps us focused on the desired outcome and the steps needed to translate ideas into action.

TIP has worked in similarly situated communities across the US, and our firm will bring a fresh perspective to the strategic planning process. Using our three-phase process, TIP will deliver a strategic action plan that helps enhance economic growth, attract investments, retain businesses, and foster employment opportunities in Indian River County.

THEORY INTO PRACTICE PLANNING MODEL



**Extends beyond immediate project team. Includes prior reports and partner network.*

1. DISCOVERY

We begin by reviewing available materials, visiting with knowledgeable sources, and conducting a targeted analysis of relevant trends to create a common foundation for the planning process.

1.1 PROJECT LAUNCH. At the outset of the engagement, we focus on establishing clear communication and effective project management protocols, which are the cornerstone of a successful engagement. Our commitment to getting it right is demonstrated by numerous repeat clients over the life of the firm.

- ▶ **Project guide.** As part of the project launch, we will prepare our *Project Startup Guide*, which sets clear, mutually agreed upon expectations for the engagement. The guide includes anticipated client tasks by phase as well as a detailed list of items we typically request at the outset of the project.

- ▶ **Kickoff meeting.** The kickoff meeting provides the opportunity to discuss objectives, define success factors, identify stakeholders and partners, formalize the outreach strategy, and review the team’s expectations for the engagement.
- ▶ **Point of contact.** We recommend the client designates a point person responsible for assisting with scheduling project meetings, helping with stakeholder input (meeting logistics, advertising, and translation services), and coordinating deliverables review.
- ▶ **Team meetings.** We will meet with County staff regularly to report on findings and discuss upcoming tasks. These meetings will allow us to achieve consensus on specific goals and provide the opportunity to refine our work product as we go. The frequency of meetings will be agreed upon during the project launch.
- ▶ **Steering committee** If an oversight group is not already in place, we can assist with forming a steering committee that is representative of current economic development efforts in the county. Members are responsible for attending meetings (usually monthly), providing input, and reviewing deliverables.

1.2 PLANNING ALIGNMENT. The team will examine the policies, relationships, and organizational priorities that will influence the planning process. Our work on this task will be expanded in subsequent phases and help shape our recommendations.

- ▶ **Policies.** Reviewing background documents (e.g., past economic development strategic action plans, Gifford Neighborhood Plan, Wabasso Corridor Plan, comprehensive plan) allows us to build on existing knowledge and to better understand current initiatives and programs that may be relevant to this work.
- ▶ **Relationships.** A scan of the partner network (e.g., local municipalities and the Chamber of Commerce) will help define existing relationships within the regional market and identify potential partnerships.
- ▶ **Priorities.** Discussions with the appropriate staff will ensure our team has a full picture of the County’s economic development initiatives and core functions.

1.3 COUNTYWIDE BASELINE ANALYSIS. Our analysts will prepare a targeted assessment of factors that define the area’s overall competitiveness and are of greatest concern to economic decision makers. Our analysis will be tailored to meet project objectives. This task will take advantage of available data resources to consider Indian River County’s current economic position and identify broader trends that may impact the county’s future economic position (e.g., population and demographic changes, housing availability, risk mitigation, and labor shortages). Where possible, data will be disaggregated by race and ethnicity to understand differential performance across populations and communities.





1.4 STAKEHOLDER ENGAGEMENT. Engaging a diverse group of community members and stakeholders is integral to our planning model. Our team will design a custom engagement process that gathers meaningful information to the planning process, raises awareness of economic issues, and builds broad community and investor support for the outcome. TIP encourages robust participation by holding a combination of in-person and virtual events; employing a mix of traditional and innovative user-friendly tools such as Zoom, Mentimeter (live polling), and Zoho (survey translation); and including key staff that are either proficient or fluent in several languages (e.g., Spanish).

- ▶ **Roundtables & interviews.** These input sessions are designed to encourage productive discussions around a targeted set of topics. They are typically conducted with major employers; elected and appointed officials; human resources specialists; real estate professionals; economic, workforce, and community development partners; and other experts. The goal is to gather information about trends, barriers, opportunities, and assets that will help shape our recommendations. Where appropriate, these sessions will be supplemented by one-on-one interviews to solicit feedback on issues that may not surface in a collective setting.
- ▶ **Public town halls.** Our team will facilitate three town halls designed to engage a larger, countywide group of stakeholders. These sessions will build energy around the planning process, provide additional insight

into community issues, and obtain general direction regarding a guiding vision for the county’s future economic development activities.

- ▶ **Project webpage.** While TIP does have experience creating and maintaining dedicated external websites, we recommend a dedicated webpage hosted on the County’s (or a partner’s) website. The page can be used to update stakeholders on the planning process, publish deliverables such as interactive data visualizations, collect community feedback on drafts, and host a survey should the County determine the need for this interactive tool (see below). This approach will facilitate easier updates, cost feasibility, accessibility, and built-in credibility for users. Past TIP clients, including the [Anchorage Economic Development Corporation](#) and the [City of San Luis Obispo](#), have structured their websites around the strategic plan. By utilizing a dedicated webpage hosted internally, TIP can easily transition all maintenance to staff after the conclusion of the project, setting the stage for the County to solicit ongoing input and update the public during implementation.
- ▶ **Interactive tools.** To expand participation in the process and ensure diverse perspectives are considered, we can facilitate the use of social media, online surveys, and other interactive tools as agreed upon with the client. These tools are effective mechanisms for engaging stakeholders, gathering anecdotal information about assets and challenges, and increasing buy-in among the broader community. They can also set the stage for the County to solicit ongoing input and share updates with the public.

TIP’s role in community and stakeholder input sessions would be to prepare the materials and facilitate the discussion. Logistics for the meetings, including arranging the location(s), advertising the sessions, and the provision of any translation services, would be the responsibility of the client.

TARGETED ENGAGEMENT					
A successful planning effort should engage a broad constituency, provide meaningful information to the planning process, raise awareness of economic issues, and build support for the outcome.	OBJECTIVES	Raise awareness of the project, generate “buzz”	Identify strengths, weaknesses, opportunities, and threats (SWOT)	Refine issues, explore opportunities, increase stakeholder buy-in	Dedicate resources, engage other leaders
	TOOLS	Social media, press releases, networking	Resident & business surveys, “town hall” style meetings	Roundtable discussions, personal interviews	Steering committee, task forces, MOUs

1.5 COMPETITIVE POSITION. Findings from the Discovery phase will be used to summarize Indian River County’s competitive position. In addition to considering strengths, weaknesses, opportunities, and threats (SWOT) that emerge from this work, our analysis will highlight factors that differentiate the area from the competition. The results will suggest potential opportunities and areas of strategic growth that will drive work in subsequent tasks.

2. OPPORTUNITY

Building on our Discovery phase findings and a review of best practices, we identify which opportunities are likely to have the greatest potential for success.

2.1 STRATEGIC DIRECTION. Working closely with the client, we will ensure the County’s economic development vision and mission statements align with the strategic direction that emerges from the Discovery phase. We will also help craft a set of guiding principles that will embody the goals and objectives of the planning process. This step will provide a framework that both points to recommended actions and establishes priorities.

2.2 STRATEGIC GROWTH AREA ANALYSIS. TIP's methodology for target industry analysis is responsive to today's workforce environment. For more traditional activities, we define targets by grouping EDA-defined industry clusters and subclusters. For less traditional targets with emerging technologies and activities, we begin with a short list of aspirational or representative employers in the desired sector and/or a specific pool of local skills or assets. For each target, we then analyze US job postings from the most recent 24-month period. This approach differs from an industry-occupation staffing matrix, which can be dated and unclear as to where hiring demands are tightest. Carefully selected samples of recent job postings allow us to identify a target's most sought-after occupations and specialized skills in (near) real-time. We then analyze the region's workforce readiness for targeted investments and pose strategic questions about the alignment of the talent pipeline with the current needs of employers.

Using an equity lens, TIP's analysis also documents patterns of occupational participation by race, ethnicity, gender, and age. Living wage thresholds are considered for a mix of family household situations. This approach identifies potential strategic growth sectors (e.g., Clean Energy, Life Sciences, Information Technology, Aviation/Aerospace, Financial/Professional Services, Manufacturing/Warehouse/Distribution, Emerging Technologies, and Art/Entertainment/Recreation) that should be a focus moving forward and equips communities with the information they need to plan for an inclusive, target-ready workforce.

2.3 LAND & REDEVELOPMENT OPPORTUNITIES. TIP will examine the extent to which Indian River County's available sites, buildings, and infrastructure are aligned to support target industry growth. This task will rely on a combination of public and proprietary data (e.g., CoStar) to help identify and map key investment areas and redevelopment zones.

- ▶ **Commercial property.** The analysis will cover supply and demand trends to identify market opportunities for Indian River County's real estate product. We will review key real estate market indicators, including rents, vacancies, and construction deliveries, as well as the underlying drivers of demand in key property types (e.g., land, industrial, retail, multifamily). In particular, we will consider opportunity zones west of I-95 and priority corridors such as Wabasso Corridor.
- ▶ **Infrastructure.** Our team will work with the County and its partners to examine emerging infrastructure assets, needs, and issues. We anticipate this information will be gathered from City and County officials and other local economic development professionals. We will rely on existing resources such as capital improvement plans and other prior planning documents. Our team will consider how potential development and redevelopment opportunities could affect transportation, utilities, and other critical infrastructure needs.
- ▶ **Development process.** Our consultants will conduct technical interviews with approximately four to six local planning and development officials. We will seek the client's input to identify the most appropriate officials to contact. Discussions with planning directors, zoning professionals, and industrial developers will shed light on how the regional development process is viewed and any potential barriers created by current land use, infrastructure, incentives, development processes, and regulations. As part of this analysis, we will seek to understand how available sites align with target industries, workforce capacity, and goals for improved collaboration between the County, the Chamber, and local municipalities.

2.4 BUSINESS GROWTH & RETENTION TOOLS. Building on prior tasks, TIP consultants will examine current incentives and policies, business and entrepreneurial supports, and marketing. Findings will inform recommended attraction, retention, and expansion actions to be implemented by the County and other key partners.

- ▶ **Incentives.** We will conduct a review of existing recruitment and retention efforts, particularly incentives and related policies. This work will suggest how to better align future business development with market opportunities and community vision.

- ▶ **Supports.** TIP will examine current supports for existing businesses (e.g., recruitment and employment services, small business counseling, access to capital, scale-up assistance, mentorship, networking) to understand any unmet needs in the community.
- ▶ **Marketing.** Our team will seek to answer: What image is Indian River County projecting? We will consider the approach used by the County and other local partners, as well as marketing and branding campaigns that are recruitment- and retention-driven. This will suggest opportunities for marketing practices/tools, branding, and programs that are aligned with business attraction, retention, and expansion efforts.

2.5 OPPORTUNITY WORKSHOP. The culmination of this phase is a facilitated discussion of potential strategies and opportunities for consideration in the Implementation phase. The purpose of the workshop will be to build consensus on economic development priorities for Indian River County. The outcome of this task will be a set of prioritized strategies and focus areas, along with a collaborative framework for aligning available resources to accomplish them.

2.6 BEST PRACTICES. Throughout the strategic planning process, we will draw on our team’s extensive network to identify and share with leadership national best practices that may be a fit for Indian River County. Based on our work in prior tasks and the priorities that emerge from the Opportunity workshop, we will select the use cases most relevant to the County’s economic development efforts moving forward. Insights into selected programs or initiatives will help shape recommendations and will be integrated into the final deliverable where appropriate.

3. IMPLEMENTATION

We provide a transparent, actionable plan for achieving the identified goals and objectives.

3.1 STRATEGIC ACTION PLAN. Using findings from prior phases, coupled with the experience of the consulting team, TIP will prepare a ten-year strategic action plan. In addition to outlining specific goals and strategies, the plan will highlight key findings from our quantitative analyses and stakeholder input. Together with the implementation matrix (see Task 3.2), the resulting document will provide specific recommendations and tools needed to implement a short-term (1-3 years), mid-term (3-6 years), and long-term (6-10 years) economic strategy. We anticipate the plan would address a number of topics, including the following.

- ▶ Positioning Indian River County with key industry sectors.
- ▶ Aligning the talent pipeline with the needs of current and future employers.
- ▶ Prioritizing key investment areas and redevelopment zones aligned with target industry growth and business retention efforts.
- ▶ Identifying opportunities to improve incentives and other business attraction, retention, and expansion tools.
- ▶ Aligning the efforts of the County, local municipalities, and the Chamber around messaging for industry recruitment.
- ▶ Spurring growth that preserves Indian River County’s unique quality of place.
- ▶ Addressing quality of place factors such as housing that impact the attraction and retention of businesses and talent.
- ▶ Evaluating collaborations, including potential public-private partnerships.

3.2 IMPLEMENTATION MATRIX. TIP will prepare a matrix that accomplishes the following.

- ▶ Identifies responsible parties and potential partnership opportunities.
- ▶ Establishes short-, mid-, and long-term timelines and sets priorities.
- ▶ Includes budget estimates (where applicable) and identifies potential funding sources.

- ▶ Defines meaningful and realistic performance metrics.

3.3 SUMMARY REFERENCE DOCUMENT. Our Production team will prepare a one-page summary of the strategic action plan. The design of this deliverable will be determined in collaboration with the client based on anticipated use and audience.

3.4 FINAL PRESENTATION. Once the strategy is finalized, we will present the recommendations to the leadership. If a higher profile rollout is desired by the client, this presentation can occur in a forum open to stakeholders or the public.

3.5 IMPLEMENTATION WORKSHOP. To build momentum for implementation, we will also facilitate an Implementation workshop focused on near-term tasks (60 to 90 days) in conjunction with the final presentation. This step capitalizes on the energy present at the rollout and helps to jump start the process.

DELIVERABLES

In the execution of this work, TIP will provide the following deliverables in the formats indicated in parentheses.

- ▶ *Project Startup Guide* (PDF of Word document).
- ▶ Facilitation of project meetings, such as team meetings, steering committee meetings, and workshops, including electronic versions of any presentations (PowerPoint) or other materials.
- ▶ Facilitation of stakeholder input sessions, such as roundtables, interviews, townhalls, and public forums, including electronic versions of any presentations (PowerPoint) or other materials.
- ▶ Dedicated webpage (existing County website) for project information and public input.
- ▶ Interactive data visualizations (Tableau Public) of the analyses outlined in the scope of work, including comprehensive investment and redevelopment area maps.
- ▶ Strategic action plan (PDF of Word document) highlighting findings and recommendations, including selected graphics as applicable.
- ▶ One-page summary reference document (PDF of Word document) of the strategic action plan.
- ▶ Implementation matrix (Excel) with goals, strategies, and actions for use assigning roles and timeframes.

E. PROJECT SCHEDULE

The TIP team is available to begin work immediately upon agreement of terms. The timeline assumes a commencement date of October 1, 2024, as indicated on page 3 of the RFP, and estimates nine months for project completion. It is intended to provide an overview of the process and can be adjusted to meet project objectives.

TASK	2024/2025									
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	
DISCOVERY										
1.1 Project launch	①									
1.2 Planning alignment										
1.3 Countywide baseline analysis										
1.4 Stakeholder engagement		②								
1.5 Competitive position			③							
OPPORTUNITY										
2.1 Strategic direction										
2.2 Strategic growth areas analysis										
2.3 Land & redevelopment opportunities						④				
2.4 Business growth & retention tools										
2.5 Opportunity workshop										
2.6 Best practices										
IMPLEMENTATION										
3.1 Strategic action plan								⑤		⑥
3.2 Implementation matrix										
3.3 Summary reference document										
3.4 Final presentation										
3.5 Implementation workshop										
ONGOING MEETINGS										
Steering committee meetings										
Staff team meetings										

SELECTED MILESTONES

- ① Kickoff meeting
- ② Roundtables & interviews begin
- ③ SWOT
- ④ Investment and redevelopment area maps
- ⑤ Draft EDSAP
- ⑥ Final EDSAP

NOTE: TIP has a production process that should be factored into timelines for the development of deliverables. This process includes professional proofreading and design. The time required for production may vary based on the type of deliverable, planned uses and audiences, and amount of content.

F. REFERENCES

Using the form provided in the RFP, we have included three references from clients for whom similar work was completed. These clients can speak to our economic development expertise and provide detailed descriptions of the following projects.

- ▶ Pinellas County, Florida | Comprehensive Economic Development Strategic Plan
- ▶ Virginia Beach Department of Economic Development (VA) | Economic Development Plan
- ▶ Richland County Economic Development Office (SC) | Economic Development Strategic Plan

REFERENCE FORM

The Consultant/Firm below has listed you as a performance reference. We would appreciate your time in completing this survey to assist us in evaluation of the Consultant/Firm's qualifications.

Consultant/Firm Name	<input type="text" value="TIP Strategies"/>
Your Project's Name & Primary Goals/Objectives	<input type="text" value="Pinellas County Comprehensive Economic Development Strategic Plan. The primary objectives of the plan were to increase collaboration between the county's communities, increase target sector investment, and attract and develop talent."/>
Name of Your Organization	<input type="text" value="Pinellas County Economic Development"/>
Name of Person Completing Form	<input type="text" value="Dr. Cynthia Johnson"/>
Title	<input type="text" value="Director"/>

Has the work of the Firm been consistently thorough, acceptable and professional? Yes No

Did this Consultant/Firm complete the work in a timely manner? Yes No

Were there any delays or added days to the project? Yes No

Were the methodologies and approaches used by the Consultant/Firm appropriate and effective for your project needs? Yes No

Were there any challenges in communication, and if so, how were they addressed?

TIP Strategies was available via email, phone, and virtual call on a regular basis and as needs arose throughout the project.

Please describe any problems with this Consultant/Firm's work, product or conduct, if applicable.

N/A

Were there any disputes regarding their work, including pending or ongoing litigation or the collection of liquidated damages? Yes No If yes, please describe.

What impact did the Consultant/Firm's work have on your economic development initiatives?

The Economic Development Strategic Plan laid out a path for county-municipality collaboration and increased private sector involvement on economic development issues. The plan aligned business development activities with the identified target sectors, and set investment priorities to increase commercial and industrial real estate and develop the workforce to support these sectors.

How well did the Consultant/Firm engage with stakeholders and incorporate their feedback into the project?

TIP Strategies conducted a series of roundtables with key stakeholder groups, as well as one-on-one interviews to gain an understanding of the opportunities and challenges facing Pinellas County. The consulting team also conducted an opportunity workshop to gather feedback on the direction of the plan.

Is there any additional feedback you would like to provide about your experience working with this Consultant/Firm?

Would you utilize this Consultant/Firm in the future should you have the opportunity? Yes No

Please rate the Consultant/Firm's overall job performance.

Excellent Very Good Good Fair Poor

May we contact you to obtain additional information? Yes No

REFERENCE FORM

The Consultant/Firm below has listed you as a performance reference. We would appreciate your time in completing this survey to assist us in evaluation of the Consultant/Firm's qualifications.

Consultant/Firm Name	TIP Strategies, Inc
Your Project's Name & Primary Goals/Objectives	Economic development plan with an effective and focused approach to the department's efforts to grow the city's tax base and expand opportunities.
Name of Your Organization	Virginia Beach Department of Economic Development (VA)
Name of Person Completing Form	Charles J. Bauman III
Title	Business Development Coordinator

Has the work of the Firm been consistently thorough, acceptable and professional? Yes No

Did this Consultant/Firm complete the work in a timely manner? Yes No

Were there any delays or added days to the project? Yes No

Were the methodologies and approaches used by the Consultant/Firm appropriate and effective for your project needs? Yes No

Were there any challenges in communication, and if so, how were they addressed?

There were absolutley no challenges in communication. In fact, TIP Strategies ensured there was an available representative of the firm at all times.

Please describe any problems with this Consultant/Firm's work, product or conduct, if applicable.

We found no issues or concerns with the work performed by TIP Strategies as it was professional, and well managed by the company.

Were there any disputes regarding their work, including pending or ongoing litigation or the collection of liquidated damages? Yes No If yes, please describe.

What impact did the Consultant/Firm's work have on your economic development initiatives?

Significant impact on our work as an economic development agency. In fact, the credibility of our work immediatly changed given our team was following a strategic plan seeking additional wealth generating opportunities for the community.

How well did the Consultant/Firm engage with stakeholders and incorporate their feedback into the project?

The consultant engaged with stakeholders in a highly professional manner that gained immediate respect for the process.

Is there any additional feedback you would like to provide about your experience working with this Consultant/Firm?

The City of Virginia Beach was so pleased by our past work with TIP Strategies that consideration is being given to having the company update our strategic plan.

Would you utilize this Consultant/Firm in the future should you have the opportunity? Yes No

Please rate the Consultant/Firm's overall job performance.

Excellent Very Good Good Fair Poor

May we contact you to obtain additional information? Yes No

REFERENCE FORM

The Consultant/Firm below has listed you as a performance reference. We would appreciate your time in completing this survey to assist us in evaluation of the Consultant/Firm's qualifications.

Consultant/Firm Name	TIP Strategies, Inc
Your Project's Name & Primary Goals/Objectives	Economic development strategic plan guiding the department's efforts to grow jobs, investment, and existing businesses in Richland County.
Name of Your Organization	Richland County Economic Development Office (SC)
Name of Person Completing Form	Jeff Ruble
Title	Director, Economic Development

Has the work of the Firm been consistently thorough, acceptable and professional? Yes No

Did this Consultant/Firm complete the work in a timely manner? Yes No

Were there any delays or added days to the project? Yes No

Were the methodologies and approaches used by the Consultant/Firm appropriate and effective for your project needs? Yes No

Were there any challenges in communication, and if so, how were they addressed?

We had no challenges with communication despite the fact the plan was created during the height of the pandemic.

Please describe any problems with this Consultant/Firm's work, product or conduct, if applicable.

TIP Strategies was thoroughly professional.

Were there any disputes regarding their work, including pending or ongoing litigation or the collection of liquidated damages? Yes No If yes, please describe.

What impact did the Consultant/Firm's work have on your economic development initiatives?

Plan was received by Richland County Council with unanimous support, and has served as a tool for developing planning since its delivery. Specifically, the plan called for the creation of a public-private partnership, and that effort is now coming to fruition.

How well did the Consultant/Firm engage with stakeholders and incorporate their feedback into the project?

The consultant interviewed, or attempted to interview, all identified stakeholders.

Is there any additional feedback you would like to provide about your experience working with this Consultant/Firm?

Veteran consultants who were able to provide valuable insight based on their work nationally.

Would you utilize this Consultant/Firm in the future should you have the opportunity? Yes No

Please rate the Consultant/Firm's overall job performance.

Excellent Very Good Good Fair Poor

May we contact you to obtain additional information? Yes No

G. PROJECT SAMPLES

The following are selected examples of TIP’s work, along with corresponding contact information and links to online deliverables. These clients can speak to our team’s ability to deliver a quality, professional product on time and within budget. Additional information about these and other projects can be found on our online portfolio at <https://tipstrategies.com/portfolio/>.



GREENVILLE AREA DEVELOPMENT CORPORATION (SC) ECONOMIC DEVELOPMENT STRATEGY

CHALLENGE

Located in South Carolina’s Upstate region, Greenville County is home to one of the nation’s most vibrant economies. Its long track record of attracting large-scale domestic and international investment has garnered media attention, including the front page of the Wall Street Journal and a segment on CBS’s 60 Minutes. The region’s natural beauty, abundant amenities, pro-business climate, and strategic location make it a sought-after destination for investors, employers, and talent. Yet, the county is not without problems. As with many fast-growing areas, housing unaffordability and a shortage of available industrial land threaten its future success. And some long-term residents fear that rapid growth is forever changing the community’s character while also leaving some groups behind.

RESPONSE

Recognizing the need to play a role in addressing the County’s critical challenges, (such as affordable housing; childcare; and diversity, equity, and inclusion) while maintaining its high-performing business development program, the Greenville Area Development Corporation (GADC) engaged TIP Strategies to prepare an economic development strategic plan. Following delays associated with the COVID-19 pandemic and local election cycles, the project team established three major goals: driving new business investment and retaining current businesses, ensuring the availability of tools and sites that are competitive, and expanding the GADC’s visibility and capacity. This framework and the associated strategies and actions were developed based on input from more than 40 stakeholder interviews, a series of roundtable discussions, and several competitive analyses, including a review of the GADC’s target sectors. While Greenville County faces a new phase in its evolution, the County is well positioned to succeed and thrive. Maintaining the County’s success and creating an economy that works for everyone will require the GADC to expand its business retention and expansion program, target emerging sectors (including advanced mobility technologies and professional and technology services), and generate new foreign investment opportunities. It must also move beyond its traditional business development role to help address long-term issues by expanding financial support, raising awareness, providing thought leadership, and convening partner organizations.

REFERENCE

Kevin Landmesser, Senior Advisor, Greenville Area Development Corporation | 233 North Main Street, Suite 250, Greenville, SC 29601 | PH: 864.235.2008 | klandmesser@greenvillecounty.org

DELIVERABLE

Economic Development Strategy, Greenville Area Development Corporation | Sept 2022
<https://greenvilleeconomicdevelopment.com/mp-files/gadc-greenville-economic-development-strategic-plan-2023.pdf/>



CHARLESTON COUNTY ECONOMIC DEVELOPMENT (SC) STRATEGIC OPERATIONS PLAN

- CHALLENGE** Faced with the closure of the Charleston Naval Complex in the early 1990s and the loss of some 22,000 jobs, Charleston County leaders responded decisively, establishing an economic development function with broad deal-making authority and dedicated funding. The decision proved to be a game-changer when Charleston was selected as the location of the second assembly line for the Boeing 787 in 2009 and the home of the first North American site for Mercedes Benz Vans in 2015. However, the county faced new economic challenges, some of which are the result of its own success, including economic disparities, housing affordability, and a strained mobility infrastructure. These challenges, along with the need to diversify the employment base, enhance the entrepreneurship ecosystem, and expand the inventory of developable sites, required Charleston County Economic Development (CCED) to expand and restructure its approach.
- RESPONSE** The successful recruitment of Boeing, Mercedes Benz, and other global brands demonstrated Charleston County’s ability to compete on an international stage for business investment, visitors, and residents. And CCED will continue to play a critical role in establishing the region as a global destination, on par with rising metros such as Charlotte, Nashville, Seattle, and Austin. Toward that end, CCED engaged TIP Strategies to prepare an operations plan that would equip the organization for the future. The plan itself was organized around two main sections: Organization and Programs. The Organization section addressed key structural recommendations for CCED, including governance, oversight, and funding. The Programs section laid out strategies and actions for pursuing the organization’s operational initiatives, including business retention and expansion, new business, business intelligence, workforce, and entrepreneurship. Economic development marketing agency Golden Shovel developed a marketing strategy and brand in conjunction with the planning process.
- REFERENCE** Steve Dykes, Executive Director, CCED | 4922 O’Hear Ave, Suite 201, North Charleston, SC 29405 | PH 843.958.4513 | SDykes@charlestoncounty.org



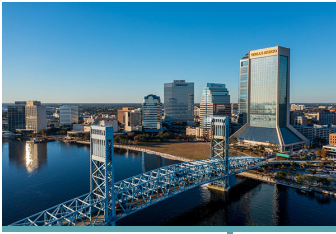
**ASHEVILLE-BUNCOMBE COUNTY ECONOMIC DEVELOPMENT
COALITION (NC)**
AVL 5X5 VISION 2020 ECONOMIC DEVELOPMENT STRATEGIC PLAN

CHALLENGE Despite a long-term decline in manufacturing employment at the national level, Buncombe County has captured top tier advanced manufacturing companies. The region is also home to the National Centers for Environmental Information and a dynamic community of entrepreneurs and innovative startups. Building on this success is a challenge for the community—one that it has been eager to meet.

RESPONSE TIP Strategies worked closely with EDC staff and board members to identify the region’s most promising economic development opportunities. The first step was to establish a common understanding of assets and challenges. Next was to conduct a deep quantitative analysis for Asheville, Buncombe County, and the four-county Asheville metro area, including comparisons to several benchmark regions, to understand how Asheville-Buncombe County compares with other communities. The new plan, AVL 5x5 Vision 2020, built on the original plan’s success and expanded its range. The new plan emphasized discrete niches within established target industries, including strengthening the existing technology base and leveraging the region’s burgeoning craft brewery sector. It also expanded upon entrepreneurship and innovation as a priority for economic development, largely through the EDC’s Venture Asheville program. Finally, a new set of metrics were established to track implementation.

REFERENCE Ben Teague, former Executive Director/COO for Asheville-Buncombe County EDC; Current position: Vice President of Strategic Development, Biltmore Farms | PH 828.209.2014 | www.biltmorefarms.com

DELIVERABLE AVL 5x5 Vision 2020 Economic Development Strategic Plan, Asheville-Buncombe County Economic Development Coalition | December 2015
www.ashevillechamber.org/wp-content/uploads/2018/01/EDC_AVL_5x5_Vision_2020.pdf



NORTHEAST FLORIDA (JACKSONVILLE, FL, AREA) THE FUTURE IS NOW—NORTHEAST FLORIDA

CHALLENGE

Northeast Florida offers residents a high quality of life with a wide range of amenities, including access to ocean beaches, inland waterways, and other outdoor recreational opportunities as well as options for rural and urban living. Over the past decade, population has increased significantly across the region as skilled talent from around the country is drawn to the area by its innovative jobs and vibrant communities. However, housing and infrastructure developments have not kept pace with growth, threatening the region’s ability to attract and retain workers.

RESPONSE

In spring 2022, leadership from across Northeast Florida’s seven counties (Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns) came together to create The Future Is Now—Northeast Florida, a people-centric strategy anchored by a strong, regionally focused vision. Driven by JAXUSA Partnership and facilitated by TIP Strategies, the ambitious and inclusive planning process acknowledged that talent is, and will continue to be, the primary driver of economic success. As part of the engagement, TIP prepared a series of analyses, including a broad-based examination of factors influencing Northeast Florida’s competitiveness (with comparisons to peer communities), a review of the talent pipeline, an analysis of local and global factors impacting market and economic growth, and the identification of specific innovation niches within the region’s emerging and high-growth industries. Nurturing these innovation niches will require significant regional investments—in physical infrastructure, in educational programming, in talent pipelines, and in the nurturing and cross-pollination of institutional relationships. In addition to the plan’s regional focus, guiding principles reflected in the goals and strategies include competitiveness, economic mobility, innovation, and resilience. Also woven through the plan’s four goals are several catalytic initiatives ranging from workforce development investments to supporting new development and revitalization efforts to growing the outdoor economy. In recognition of the work that had already been accomplished, the plan recommended the continuation of proven strategies, the scaling up of local programs that could benefit the wider region, and new initiatives that will foster new partnerships needed to continue to grow and diversify the economy.

REFERENCE

Anna Lebesch, SVP-Strategy & Talent Development, JAXUSA Partnership | 3 Independent Drive, Jacksonville, Florida 32202 | PH 904.366.6652 | alebesch@jaxusa.org

DELIVERABLE

The Future is Now—Northeast Florida: Executive Summary | February 2023
<https://jaxusa.org/wp-content/uploads/2023/02/2023-03-16-NEFL-Executive-Summary-FINAL-Web.pdf>
The Future is Now—Northeast Florida (Final Report) | March 2023
<https://jaxusa.org/wp-content/uploads/2023/03/The-Future-is-Now-Final-Report.pdf>

Image Credit: Downtown Jacksonville by Ketterman Photography courtesy of JAXUSA Partnership.



TAMPA BAY ECONOMIC DEVELOPMENT COUNCIL ECONOMIC DEVELOPMENT STRATEGIC PLAN

CHALLENGE	Tampa Bay’s strong economic base, high-profile developments, diverse culture, and desirable amenities have made it one of the country’s fastest-growing regions. Guided by its 2017 strategic plan, the Tampa Bay Economic Development Council (TBEDC), formerly the Tampa Hillsborough Economic Development Corporation, has been instrumental in several regional transformations. Despite the TBEDC’s achievements, the region’s untapped potential, coupled with significant changes to the practice of economic development, meant that further investments were needed to propel Tampa Bay to the next level.
RESPONSE	In the spring of 2019, the TBEDC hired TIP Strategies to develop an organizational action plan. Findings from a comprehensive assessment of the regional economy and insights gained from meetings with 70 influential leaders and stakeholders provided an understanding of the region’s economic landscape. Based on this work, TIP identified three goals for the TBEDC to focus its efforts over the next three years (2020-2023): business development, talent attraction, and placemaking. The business development goal leveraged recent corporate investments, including the region’s strong record of foreign direct investment, by targeting five strategic growth areas that align with the region’s strengths: cybersecurity, fintech, health tech, supply chain management technologies, and cancer solutions. The talent goal sought to build on the highly successful Make It Tampa Bay campaign aimed at attracting Millennials to the region. Finally, the placemaking goal recognized the role that vibrant communities play in economic competitiveness. TIP also made recommendations for a capital campaign that would enable the TBEDC team to enhance its marketing, business development, and research capacity and address catalyst opportunities.
REFERENCE	Craig Richard, President & CEO 101 East Kennedy Blvd., Suite 1750, Tampa, FL 33602 PH 813.518.2620 crichard@tampabayedc.com



CITY OF NORTH MIAMI, FL TARGET INDUSTRY ANALYSIS

CHALLENGE

Centrally located between Miami and Fort Lauderdale, the City of North Miami enjoys the benefits of both cities, including international airports, major seaports, and vibrant downtowns. Aside from its enviable location in one of the most dynamic regions in the US, North Miami boasts several distinct features. These include a unique downtown district anchored by the Museum of Contemporary Art (MOCA), Florida International University's Biscayne Bay Campus, Johnson and Wales University, and one of the largest mixed-use development projects in Florida: Solé Mia. The city also benefits from a diverse population, an established group of local businesses, visionary leadership, a strong professional staff, and a robust network of partners. However, North Miami's commercial districts have not achieved the levels of investment experienced by similarly positioned South Florida cities and it continues to serve, primarily, as a bedroom community for surrounding cities.

RESPONSE

To better leverage their competitive position, the City of North Miami engaged TIP Strategies to conduct a target industry analysis. The objective of the work was to provide a clear strategy for identifying the industry sectors and businesses the City should target for development, attraction, and foreign direct investment within North Miami's industrial and commercial zoning districts. In addition to an extensive economic analysis and a review of trends in entrepreneurial and foreign direct investment, the identification of target sectors was informed by stakeholder interviews, site visits, input from the Steering Committee, and guidance from City staff and elected officials. Four sectors were identified—medical services, hospitality and culinary, environmental sustainability, and arts and design—along with the anchor institutions that help shape and support each sector's growth. As the analysis was headed to print, the COVID-19 pandemic and associated economic crisis took center stage. The recommendations were restructured to acknowledge and address those near-term challenges, however, the strategy remained focused on long-term responses, including an expanded business retention and expansion effort, consideration of pro-development policies and forward-looking infrastructure investments, and a more aggressive target marketing effort.

REFERENCE

Tanya Wilson, AICP, Planning, Zoning & Development Director | 12400 NE 8th Avenue, North Miami, FL 33161 | PH 305.893.6511, Ext. 19001 | twilson@northmiamifl.gov

Image Credit: MOCA North Miami courtesy City of North Miami - Copyright Leo A. Daly and Island Studio Productions

ADDITIONAL WORK SAMPLES

The following examples of TIP's work have been made available online by our clients.

- ▶ **Economic Development Strategic Plan, City of San Luis Obispo, CA** | September 2023
<https://www.slocity.org/business/economic-development/economic-development-strategic-plan>
- ▶ **Strategic Plan Five-Year Update, Pasadena Economic Development Corporation (TX)** | June 2023
<https://www.pasadenaedc.com/about-us/strategic-plan/2023-strategic-five-year-update>
- ▶ **Economic Development Strategic Plan, City of Waco, Texas** | May 2023
<https://www.waco-texas.com/files/content/public/v/48/departments/economic-development/2023-04-20-waco-edsp-final.pdf>
- ▶ **Choose Anchorage: A Framework for Revitalization, Anchorage Economic Dev. Corp. (AK)** | November 2022
<https://aedcweb.com/choose-anchorage/>
<https://aedcweb.com/data-tools/>
- ▶ **Economic Development Strategic Framework, City of San Antonio, TX** | October 2022
<https://www.sanantonio.gov/Portals/0/Files/EDD/Reports/EDD-StrategicFramework.pdf>
- ▶ **Strategic Plan for Equitable Economic Development, City of Richmond, VA** | May 2022
www.rva.gov/sites/default/files/2022-05/Richmond%20SPEED%20-%20051822%20-%20Clean%20Final%20For%20Introduction.pdf
- ▶ **Comprehensive Economic Development Strategy, Indianapolis Metropolitan Planning Org. (IN)** | May 2022
<https://www.indympo.org/whats-underway/ceds>
- ▶ **Comprehensive Economic Development Strategy, Lake County Partners (IL)** | April 2022
www.lakecountypartners.com/wp-content/uploads/2022/04/2022-04-04-Lake-County-CEDS-FINAL-2.pdf
- ▶ **Economic Development Strategic Plan Update, City of Fort Worth, TX** | January 2022
www.fortworthtexas.gov/files/assets/public/ecodev/documents/strategic-plan/updates/2022-strategic-plan-update.pdf
- ▶ **Jefferson EDGE 2025: Strategic Economic Dev. Plan, Jefferson Parish Economic Dev. Commission (LA)** | Mar. 2021
www.jedco.org/wp-content/uploads/2021/03/edge2025.pdf
- ▶ **One Rogue Valley: Comprehensive Economic Development Strategy (OR)** | March 2020
soredi.org/wp-content/uploads/2019/11/2019-11-08-SORED-CEDES-FINAL.pdf
- ▶ **First Suburbs Coalition Regional Housing Summit: Summary Report** | November 2019
www.marc.org/sites/default/files/2022-03/NLCReport.pdf
- ▶ **Coastal Mississippi Investment Opportunities Analysis, Gulf Coast Business Council and Gulf Coast Community Foundation** | November 2019
irp-cdn.multiscreensite.com/1446ff30/files/uploaded/2019-11-19%20MS%20Gulf%20Coast%20Plan%20FINAL.pdf
- ▶ **Comprehensive, Countywide Econ. Dev. Strategy, Travis County, TX (Austin)** | February 2019
www.traviscountytexas.gov/images/planning_budget/Docs/FY20/FINAL_Comprehensive_Economic_Development_Strategy.pdf
- ▶ **Economic Impact and Workforce Transition Study, Savannah River Site Community Reuse Org.** | Aug 2017
srscro.org/wp-content/uploads/2019/10/2017-SRS-Economic-Impact-Study-Full-Report.pdf
srscro.org/wp-content/uploads/2019/10/2017-SRS-Economic-Impact-Study-Summary.pdf

H. PROJECT TEAM

At TIP, the work of our consulting team is conducted under the direct supervision of a senior member of the firm. The **principal-in-charge** is actively involved in every phase. TIP senior partner **JEFF MARCELL** will act as principal-in-charge and will serve as the primary point of contact for this work. In this capacity, he will participate in the scoping of the project and provide technical and strategic input during each phase.

The principal-in-charge receives input from other senior members of our staff who serve as **strategic advisors** to the work. **TRACYE MCDANIEL**, TIP president, will serve as an advisor and contribute expertise on topics including tourism, marketing, and global business recruitment.

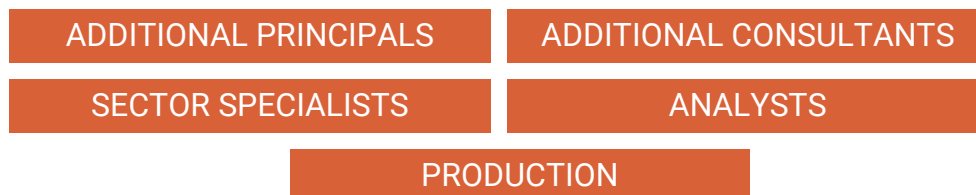
In addition, a **lead consultant** is assigned to manage each engagement and is responsible for day-to-day client communication, directing project research, and report writing. Consultant **VICTORIA WILSON** will serve as lead consultant for this work and will be assisted in these duties by senior consultant **ELIZABETH SCOTT**. As shown in the staffing diagram below, the project leads are assisted by a team of **analysts** and **production professionals**, who have extensive experience preparing thought-provoking analyses and engaging deliverables.

Beyond the immediate project team, our process includes regular brainstorming sessions that involve the entire firm. At these meetings, project managers present their findings for peer review. We believe our clients benefit from this approach, which engages the full brainpower and expertise of our team in addressing their challenges.

CLIENT-FACING TEAM



ADDITIONAL ADVISORS & EXPERTISE



STAFF PERCENTAGES

The following is anticipated percentage of the work to be assigned to team members. It is an estimate only.

- ▶ Jeff Marcell, Senior Partner 20%
- ▶ Tracye McDaniel, President 5%
- ▶ Victoria Wilson, Consultant 30%
- ▶ Elizabeth Scott, Senior Consultant 10%
- ▶ Analysts 20%
- ▶ Production 15%

At any given time, the principal-in-charge and consultants are working on three to four projects. While the percentage allocation varies over the course of an engagement, this workload translates to between 25 percent and 35 percent of time committed per project. Analysts and Production are involved throughout the course of the engagement as needed on specific tasks and deliverables.

A summary of qualifications for key TIP personnel is provided in the remainder of this section. Resumes are provided as an appendix. Additional resumes are available upon request.

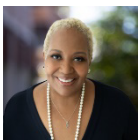
CLIENT-FACING TEAM

JEFF MARCELL *Senior Partner*



Jeff has more than two decades of experience in economic development as a practitioner and consultant. This “hands-on” experience brings a deep understanding of how to structure high-functioning, competitive organizations. As a principal, Jeff leads TIP’s high-profile national consulting engagements and contributes to the strategic planning of the business. His client portfolio includes facilitating the Governor of Delaware’s Economic Development Taskforce that established a new public-private partnership for economic development, supporting the Detroit Regional CEO Group in a review of employer-led solutions to workforce challenges, and leading multiple phases of the State of Washington’s defense industry adjustment strategy. Prior to joining TIP in 2014, he was with the Economic Development Council of Seattle and King County for a decade, first as executive vice president and COO and then as the president and CEO. During this time, he was active in statewide and regional organizations, including serving in leadership roles on the regional workforce council and a number of industry trade associations. His involvement with these groups coupled with his corporate recruitment experience gives him vital insights into the requirements of firms in a variety of industries. Jeff holds a law degree from the South Texas College of Law, a BA in political science from the University of Illinois at Chicago, and a certificate in Nonprofit Management from the University of Washington. An avid mountaineer, Jeff makes a point to carve out time to tackle some of the world’s most challenging peaks from his home base in the Seattle area.

TRACYE MCDANIEL *President*



Tracye is a recognized trailblazer in the economic development and travel marketing industry, with expertise in international business development and marketing spanning more than 50 countries. For more than three decades, she has been a trusted advisor to CEOs, nonprofits, public organizations, and private enterprises. Tracye brings her experience as a widely recognized C-Suite level strategist and a reputation for creating mutually beneficial strategic partnerships across a broad spectrum of industries to her role as TIP president. She serves on the Environmental Management Advisory Board (EMAB) of Department of Energy, whose mission is to provide independent and external information and recommendation to Environmental Management. She is also past chair of the International Economic Development Council (IEDC), the world’s largest economic development association, and served as co-founding chair of IEDC’s Race and Economic Development (RED). Prior to joining the firm in 2019, Tracye founded McDaniel Strategy Ecosystems and served as president and CEO for two separate state-level marketing and lead-generation organizations: first in New Jersey (where she was appointed by then newly elected New Jersey governor, Chris Christie, and business leaders to serve as the founding CEO of Choose New Jersey) and later in Texas (where she headed up the Texas Economic Development Corporation). Tracye also served as executive vice president and COO of the Greater Houston Partnership where she teamed with business leaders to raise more than \$32 million and to devise and execute Opportunity Houston, the organization’s successful economic development global marketing and lead generation initiative. Tracye also served on the Board of Regents of Texas Southern University, one of the nation’s largest historically Black universities (HBCU). She holds a Bachelor of Science in Communications from the University of Texas at Austin.

VICTORIA WILSON *Consultant*



Victoria has over 10 years of experience applying her knowledge of data, research, and community engagement toward research and consulting projects. Through this work she has collaborated closely with community leaders and industry experts to develop and execute successful strategies to advance their policy goals. At TIP, she has managed economic development engagements at the city, county, and state levels focused on community outreach, organizational alignment, and fostering innovation. Her most recent work includes managing the economic development strategic planning process for Pinellas County, Florida, and the Town of Flower Mound, Texas, as well as supporting the delivery of state-wide strategic plans on behalf of the Delaware Business Roundtable and the Texas Association of Business. Prior to joining TIP Strategies in 2021,

she worked in the affordable housing space, analyzing and developing policies that would increase the supply of affordable housing in Texas. Victoria also conducted transportation and international trade research for several years, during which she specialized in the impacts of trade flows and corridors on the communities they serve. As a native Spanish speaker, Victoria has extensive experience engaging stakeholders in Mexico and the US in the language, as well as translating written materials. She holds a Master of Public Affairs from the University of Texas at Austin and a Bachelor of Arts in Philosophy and German from Colgate University.

ELIZABETH SCOTT *Senior Consultant*



Elizabeth has nearly 20 years of experience managing diverse projects including business recruitment and retention, economic and workforce development strategies, socioeconomic impact analyses, and land use studies. Elizabeth draws from her deep experience with regional strategies to manage TIP projects—working closely with community, business, and academic leaders to develop comprehensive strategies that improve economic vitality and quality of life. Before joining TIP in 2019, Elizabeth directed business recruitment, retention, and expansion efforts for the Columbia River Economic Development Council (CREDC) in Clark County, Washington. During her tenure with CREDC, she also successfully managed several multi-million-dollar grant programs across the Greater Portland-Vancouver region. Early in her career, she also supported BRAC/NEPA projects by providing socioeconomic analysis for environmental assessments and environmental impact statements. She received a Master of Natural Resources from Virginia Tech and a Bachelor of Arts in History and Sociology from the University of Tampa. Elizabeth lives in Michigan’s Upper Peninsula with her husband and three children, where they can be found exploring the woods by foot, bike, or skis.

ADVISORS & ADDITIONAL EXPERTISE

TOM STELLMAN *Founder/CEO*



Tom brings more than 30 years of experience working with communities and businesses to identify collaborative strategies for achieving economic growth. As developer of TIP’s model of Talent, Innovation, and Place, he has helped clients harness their energy and resources to focus on those factors that most impact their success. Over the last decade, Tom’s consulting work has increasingly concentrated on the role of talent and social equity in achieving a sustainable future. His client-facing work has engaged high-level executives from many of the nation’s leading companies, including JPMorgan Chase, ExxonMobil, and AT&T, along with its largest defense contractors, including Raytheon, Triton Systems, and General Dynamics. As CEO, he embodies TIP’s commitment to getting it right. Prior to founding the firm, Tom served as director of international business development and marketing for the State of Texas, where he assisted Texas companies looking to expand and locate in international markets. He also served as staff to the Texas Mexico Authority and as border development coordinator for the state. Tom received a Bachelor of Arts in Government from the University of Texas at Austin and studied at UT’s Institute of Latin American Studies.

JON ROBERTS *Principal/Managing Partner*



Jon has focused on the role of innovation and technology in economic development since the 1980s. Upon joining TIP as a principal and managing partner in 2000, Jon helped transition the company from its Texas-based site selection practice to a national strategy firm. As managing partner, Jon plays an instrumental role in strategic goalsetting. He has also amassed an impressive portfolio that includes planning work from New York to California, with significant regional projects in the Mississippi Delta, Seattle’s Puget Sound, and the Great Lakes area. Prior to joining the firm, Jon was the director of business development first for the State of Washington and then, under Governor Ann Richards, for the State of Texas. During the transition to Governor Bush’s tenure, he helped restructure the state’s economic development organization and then co-authored the new strategic plan for the State of Texas. Jon also has deep ties to the state of Oregon. He was vice-president with the Oregon Technology Fund and lead investor for the Hood River Brewing Company, managed two start-up technology companies (Fiberlite Composites and LifePort Inc.), and founded a mountain bike company in Portland, Oregon (Fat Tire Farm). He

received his BA and MA degrees from the University of Hawaii and did post-graduate work towards his PhD at the University of Oregon. Born and raised in Germany, Jon now resides in Austin and spends his summers in Bend, Oregon.

BRENT MCELREATH, AICP SVP, Research & Development



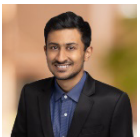
Brent has more than 25 years of experience in comparative urban economic analysis of US and international cities. He has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets and has monitored infrastructure investment performance in the US, Europe, Asia, and Australia. As senior vice president of TIP's research effort, Brent brings his extensive experience managing public- and private-sector research teams and an understanding of global economic and demographic drivers to TIP's client work. As a vice president at MSCI prior to joining TIP, Brent participated in the development of a geographically standardized global tool that evolved from the consolidation of dozens of asymmetrical national databases. While at PPR (now CoStar), he supervised the publication of 250+ quarterly property market forecasts. Other achievements in his career have included the design of a scenario modeling system for analyzing urban growth patterns; improvements and refinements to outdated models of fiscal impact analysis; and the design of data collection systems for analyzing and modeling global real estate markets. Brent is an AICP-certified planner and a long-time member of the American Planning Association. He received a Master of Community and Regional Planning and Bachelor of Business Administration in Finance from the University of Texas at Austin.

EVAN JOHNSTON Senior Analyst



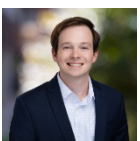
Evan has nearly 10 years of experience and specializes in regional labor market analysis and data manipulation. As a senior analyst at TIP, he organizes data systems for visualization and dissemination, creates data-driven analytics across a variety of topics, and researches policy to help contextualize the data. His recent work includes developing TIP's occupational assessments of job risk, quality, and access in addition to expanding the firm's workforce analytics with an equity lens and an increased emphasis on where and how people work. His previous experience includes research on gender diversity in high-tech employment growth and the development of entrepreneurial ecosystems at the IC2 Institute and the McCombs School of Business at the University of Texas at Austin.. Evan holds a Bachelor of Arts in Economics and Psychology and a Bachelor of Science in Mathematics from the University of Texas at Austin in addition to certificates in applied statistical modeling, computer science, and business.

AJAY KASTURIRANGAN Analyst



Ajay has experience in machine learning, big data, and dashboard creation. He recently drew from this expertise to present on the urban commute for visually impaired individuals in New York City at the 2023 Applied Urban Science Conference. As a member of TIP's research and development team, Ajay leverages his analytical skills, honed through rigorous research and academic roles. He helps devise data-driven tools and dashboards to monitor quantitative and qualitative economic indicators for TIP's clients. Before joining the firm, Ajay was a data analyst in the insurance industry, crafting enterprise-level dashboards and working extensively with sales, risk, and financial data. One standout project he created while in this role was a visualization of flood risks for highway projects, which served to enhance transparency for insurance clients. In addition, Ajay previously served as a course assistant for graduate-level courses in machine learning and data analytics at New York University (NYU). He holds a Master of Science from NYU's Center for Urban Science + Progress and a Bachelor of Technology from Manipal Institute of Technology.

REECE NEATHERY Analyst



Reece has experience developing municipal and county-level comprehensive plans, including stakeholder-focused projects aimed at creating long-term growth plans for rural Texas communities. While previously working in the real estate field, he provided data analysis and visualization of proprietary real estate data to report trends in both housing and commercial markets. As an analyst at TIP, Reece

gathers and analyzes fiscal, demographic, and commercial real estate data to allow project consultants to communicate clearly with stakeholders. He specializes in GIS mapping and analysis, using maps to effectively convey the information contained in a dataset in a way that is easily understood and visually appealing. Reece received his Master of Urban Planning from Texas A&M University, where he performed extensive research on placemaking and walkability in regions of extreme heat. He also earned a Bachelor of Science in Geography with a minor in Mathematics from the University of Alabama.

KAREN BEARD *SVP, Production*



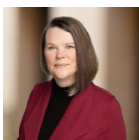
Karen has 30 years of experience thinking about economic development and community planning from a data, policy, and strategy perspective. Since joining TIP in 2000, she has filled both client-facing and “home team” roles for the firm. As a research associate and then a consultant, she managed client engagements in Texas and across the US. Her major projects included the preparation of talent-driven strategies for clients in military-dependent regions including northern Kentucky (Fort Knox), central Texas (Fort Hood), middle Tennessee (Fort Campbell), and east Alabama (Anniston Army Depot). In her current role as senior vice president of production, Karen helps coordinate the firm’s client deliverables. Karen’s prior experience includes working as a researcher for several state agencies including the Texas Department of Commerce, the Texas Rehabilitation Commission, and the State Bar of Texas. She has a background in survey research and taught the data analysis component of the Texas Basic Economic Development Course from 2006 to 2020. She received a Master of Community and Regional Planning and Bachelor of Arts in Sociology from the University of Texas at Austin. Karen lives in Austin with her husband and children, but escapes to their tiny hideaway in Rockport, Texas, every chance she gets.

MEREDITH EBERLE *Senior Graphic Designer*



Meredith possesses more than a decade of experience in graphic design. As TIP’s senior graphic designer, Meredith draws on both her career experience and fine-arts education to help shape the look and feel of TIP’s presentations, communications, and deliverables. Her contributions include design and layout; custom infographics, maps, and illustrations; project websites; and other creative digital and print media. Meredith studied at The School of The Art Institute of Chicago and the University of North Texas, graduating with honors. She received a Bachelor of Arts in Photography with a minor in Social Science. Outside of TIP, Meredith pursues other artistic endeavors, including music, photography, and writing, which further shape her creative contributions to the firm.

TINA AVENT *Designer*



Tina has nearly two decades of design experience, including expertise in user interface (UI), user experience (UX), and accessibility standards. At TIP, Tina prepares client deliverables and presentations, creates and maintains design assets, and designs and packages Tableau deliverables. She holds an associate degree in UI/UX from Austin Community College (Austin, Texas) and studied graphic design and photography at the University of North Texas (Denton, Texas).

I. BUDGET

The fee for completion of this work is \$140,000, plus expenses, with total costs not to exceed \$150,000. If we are selected based on our approach, qualifications, and experience, our team will work with the County to align the scope with the financial resources available for the execution of this project.

FEES

Our contracts are typically structured as a flat fee, payable in set monthly installments based on the estimated length of the engagement. The breakdown shown below is an estimate and is intended to reflect anticipated level of effort.

PHASE	NUMBER OF HOURS BY POSITION				TOTAL	
	Principal \$275	SVP/VP/Senior \$200	Professional \$150	Associate \$125	Hours	Fees
Discovery	65	75	110	--	250	\$49,375
Opportunity	55	80	100	--	235	\$46,125
Implementation	60	65	100	--	225	\$44,500
Total	180	220	310	--	710	\$140,000

EXPENSES

Expenses are subject to approval and are billed at cost. They include custom data purchases (if any) and travel and lodging associated with conducting this work.

- ▶ **Travel.** We anticipate a combination of virtual and in-person meetings for this work. The not-to-exceed amount provided above assumes between three and four in-person trips to the region. The per unit cost shown below are estimates only. Actual trips may include a mix of travel modes and varying levels of staffing, travel days, etc. The timing and number of trips would be discussed as part of the development of a project work plan.
- ▶ **Deliverables.** All deliverables will be in electronic format. If requested, TIP can provide printed copies at cost. All deliverables will be provided in TIP's color scheme and fonts unless custom branding is agreed upon in advance.

ESTIMATED TRAVEL EXPENSES PER TRIP	PER UNIT COST	TOTAL
Airfare (roundtrip fare for 2 staff members)	\$500	\$1,000
Parking	\$20	\$120
Car rental/ground transportation	\$100	\$300
Meals & incidentals	\$50	\$300
Lodging (2 nights)	\$195	\$780
Total Estimated Expenses Per Trip		\$2,500

J-K. SWORN STATEMENT & CERTIFICATION FORMS

As indicated on page 3 of the RFP, TIP has completed and attached the following required forms.

- ▶ Sworn statement on Disclosure of Relationships as per Section 105.08 of the Indian River County Code.
- ▶ Certification Regarding Prohibition Against Contracting with Scrutinized Companies.

SWORN STATEMENT UNDER SECTION 105.08, INDIAN RIVER COUNTY CODE, ON DISCLOSURE OF RELATIONSHIPS

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement **MUST** be submitted with Bid, Proposal or Contract No. 2024049
for RFP for EDSAP

2. This sworn statement is submitted by: TIP Strategies, Inc.
(Name of entity submitting Statement)

whose business address is:

13492 N Hwy 183, Suite 120-254, Austin, TX 78750

and its Federal Employer Identification Number (FEIN) is 74-2762692

3. My name is Tom Stellman
(Please print name of individual signing)

and my relationship to the entity named above is CEO and Founder

4. I understand that an “affiliate” as defined in Section 105.08, Indian River County Code, means:

The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of the entity.

5. I understand that the relationship with a County Commissioner or County employee that must be disclosed as follows:

Father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, daughter-in-law, son-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, half sister, grandparent, or grandchild.

6. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. [Please indicate which statement applies.]

X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the

entity, have any relationships as defined in section 105.08, Indian River County Code, with any County Commissioner or County employee.

_____ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents, who are active in management of the entity have the following relationships with a County Commissioner or County employee:

Name of Affiliate or entity	Name of County Commissioner or employee	Relationship

Tom Stellman
(Signature)

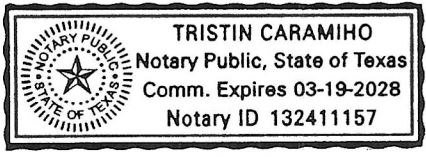
07/30/2024
(Date)

STATE OF Texas

COUNTY OF Williamson

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this 30th day of July, 2024, by Tom Stellman (name of person making statement).

Tristin Caramiho
(Signature of Notary Public - State of Texas)



(Print, Type, or Stamp Commissioned Name of Notary Public)

who is personally known to me or who has produced _____ as identification.

CERTIFICATION REGARDING PROHIBITION AGAINST CONTRACTING WITH SCRUTINIZED COMPANIES

(This form **MUST** be submitted with your response)

I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit have been placed on the Scrutinized Companies that Boycott Israel List created pursuant to s. 215.4725 of the Florida Statutes, or are engaged in a boycott of Israel.

In addition, if this solicitation is for a contract for goods or services of one million dollars or more, I hereby certify that neither the undersigned entity, nor any of its wholly owned subsidiaries, majority-owned subsidiaries, parent companies, or affiliates of such entities or business associations, that exists for the purpose of making profit are on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473 of the Florida Statutes, or are engaged in business operations in Cuba or Syria as defined in said statute.

I understand and agree that the County may immediately terminate any contract resulting from this solicitation upon written notice if the undersigned entity (or any of those related entities of respondent as defined above by Florida law) are found to have submitted a false certification or any of the following occur with respect to the company or a related entity: (i) it has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or (ii) for any contract for goods or services of one million dollars or more, it has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or it is found to have been engaged in business operations in Cuba or Syria.

Name of Respondent: Tom Stellman

By: Tom Stellman
(Authorized Signature)

Title: CEO and Founder

Date: 07/30/2024

L. REQUESTED CHANGES TO THE SAMPLE AGREEMENT

Consulting Agreement for Economic Development Strategic Action Plan (EDSAP)

THIS AGREEMENT, entered into this ____ Day of ____, 2024, by and between INDIAN RIVER COUNTY, a political subdivision of the State of Florida, hereinafter referred to as the "COUNTY", and _____, hereinafter referred to as the "CONSULTANT".

BACKGROUND RECITALS:

The COUNTY selected CONSULTANT to complete development of an economic development strategic action plan (EDSAP), based on a proposal submitted in response to Request for Proposals 2024059.

The COUNTY and the CONSULTANT, in consideration of their mutual covenants, herein agree with respect to the performance of professional consulting services by the CONSULTANT, and the payment for those services by the COUNTY, as set forth in this Agreement.

The CONSULTANT shall provide the COUNTY with consulting services and such other related services as defined in the scope of services, provided as Exhibit 1.

NOW THEREFORE, in accordance with the mutual covenants herein contained and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. COUNTY OBLIGATIONS

The COUNTY will provide the CONSULTANT with a copy of any preliminary data or reports available as required in connection with the work to be performed under this Agreement, together with all available documents in the possession of the COUNTY pertinent to the Services. The CONSULTANT shall satisfy itself as to accuracy of any data provided. The CONSULTANT is responsible for bringing to the COUNTY's attention, for the County's resolution, material inconsistencies or errors in such data that come to the CONSULTANT'S attention.

The COUNTY will cooperate fully with the CONSULTANT in order that all phases of the work may be properly scheduled and coordinated.

2. RESPONSIBILITIES OF THE CONSULTANT

The CONSULTANT agrees to perform all necessary Services in connection with the work set forth in Exhibit 1.

The CONSULTANT agrees to complete the work within the time frame specified in Exhibit 3.

The CONSULTANT will maintain an adequate staff of qualified personnel.

The CONSULTANT will comply with all present and future federal, state, and local laws, rules, regulations, policies, codes, and guidelines applicable to the Services performed under this Agreement.

The CONSULTANT shall during the entire term of this Agreement, procure and keep in full force, effect, and good standing any and all necessary licenses, registrations, certificates, and any and all other authorizations as are required by local, state, or federal law, in order for the CONSULTANT to render its Services as described in this

Agreement. The CONSULTANT shall also require all sub-consultants to comply by contract with the provisions of this section.

The CONSULTANT will cooperate fully with the COUNTY in order that all phases of the work may be properly scheduled and coordinated.

The CONSULTANT will cooperate and coordinate with other COUNTY CONSULTANTS, as directed by the COUNTY.

The CONSULTANT shall report the status of the Services under this Agreement to the County Project Manager upon request, and hold all drawings, calculations and related work open to the inspection of the County Project Manager or his authorized agent at any time, upon reasonable request.

All documents, reports, maps, contract documents, and other data developed by the CONSULTANT for the purpose of this Agreement, are, and shall remain, the property of the COUNTY. The foregoing items will be created, maintained, updated, and provided in the format specified by the COUNTY. When all work contemplated under this Agreement is complete, and upon final payment, all of the above data shall be delivered to the County Project Manager.

The CONSULTANT shall not assign or transfer any work under this Agreement without the prior written consent of the COUNTY.

CONSULTANT is registered with and will use the Department of Homeland Security's E-Verify system (www.e-verify.gov) to confirm the employment eligibility of all newly hired employees for the duration of this agreement, as required by Section 448.095, F.S. CONSULTANT is also responsible for obtaining proof of E-Verify registration and utilization for all subconsultants.

3. TERM; DURATION OF AGREEMENT

This Agreement shall remain in full force and effect for a period of one year, after the date of execution thereof, or upon completion of all project phases as defined by the COUNTY, whichever occurs earlier, unless otherwise terminated by mutual consent of the parties hereto, or terminated pursuant to Section 8 "Termination".

4. COMPENSATION

The COUNTY shall pay to the CONSULTANT a mutually agreed upon maximum amount not-to-exceed professional fee for each completed task, on a deliverable basis, all as set forth in Exhibit 2. Invoices shall be submitted to the County Project Manager, in detail sufficient for proper prepayment and post payment audit. Upon submittal of a proper invoice the County Project Manager will determine if the tasks or portions thereof have been satisfactorily completed. Upon a determination of satisfactory completion, the County Project Manager will authorize payment to be made. All payments for services shall be made to the CONSULTANT by the COUNTY in accordance with the Florida Prompt Payment Act, as may be amended from time to time (Section 218.70, Florida Statutes, et seq.).

No additional payment will be due to the CONSULTANT for administrative copies, printing, per diem, meals and lodgings, taxi fares and miscellaneous travel-connected expenses for CONSULTANT's personnel.

The COUNTY may at any time notify the CONSULTANT of requested changes to the Services, and thereupon the COUNTY and the CONSULTANT shall execute a mutually agreeable amendment to this agreement. Should this amendment result in the reduction in services, the CONSULTANT shall be paid for the Services already performed

and also for the Services remaining to be done and not reduced or eliminated, upon submission of invoices as set forth in this Agreement.

The COUNTY may, at any time and for any reason, direct the CONSULTANT to suspend Services, in whole or in part under this Agreement. Such direction shall be in writing, and shall specify the period during which Services shall be stopped. The CONSULTANT shall resume its Services upon the date specified, or upon such other date as the COUNTY may thereafter specify in writing. Where the COUNTY has suspended the Services under this Agreement for a period in excess of six (6) months, the compensation of CONSULTANT for such suspended Services may be subject to modification. The period during which the Services are stopped by the COUNTY shall be added to the time of performance of this Agreement.

5. ADDITIONAL WORK

If services in addition to the Services provided hereunder are required or desired by the County in connection with the Project, the COUNTY may, at the sole option of the COUNTY: separately obtain same outside of this Agreement; or request the CONSULTANT to provide, either directly by the CONSULTANT or by a sub consultant, such additional services by a written amendment to this Agreement.

6. OWNERSHIP AND REUSE OF DOCUMENTS

Ownership and Copyright: Ownership and copyright of all reports, tracings, plans, electronic files, specifications, field books, survey information, maps, contract documents, and other data first developed by the CONSULTANT pursuant to this Agreement, shall be vested in the COUNTY. Said materials shall be made available to the COUNTY by the CONSULTANT at any time during normal business hours upon reasonable request of the COUNTY. On or before the tenth day after all work contemplated under this Agreement or individual Work Order is complete, all of the above materials shall be delivered to the County Project Manager.

Reuse of Documents: All documents, including but not limited to reports, drawings and specifications, prepared or performed by the CONSULTANT pursuant to this Agreement, are related exclusively to the services described herein. They are not intended or represented to be suitable for reuse by the COUNTY or others on extensions of this project or on any other project. The COUNTY's reuse of any document or drawing shall be at the COUNTY's own risk. The COUNTY shall not hold the CONSULTANT liable for any misuse by others.

7. INSURANCE AND INDEMNIFICATION

During the performance of the work covered by this Agreement, the CONSULTANT shall provide the COUNTY with evidence that the CONSULTANT has obtained and maintains the insurance listed in the Agreement.

CONSULTANT shall maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the CONSULTANT, its agents, representatives, or employees. The cost of such insurance shall be included in the CONSULTANT's fees.

Minimum Scope of Insurance

- A. Worker's Compensation as required by the State of Florida. Employers Liability of \$100,000 each accident, \$500,000 disease policy limit, and \$100,000 disease each employee.
- B. General Liability \$1,000,000 combined single limit per accident for bodily injury and property damage. Coverage shall include premises/operations, products/completed operations, contractual liability, and independent contractors. COUNTY shall be named an "Additional Insured" on the certificate of insurance.

C. Auto Liability \$500,000 combined single limit per accident for bodily injury and property damage. Coverage shall include ~~owned vehicles~~, hired vehicles and non-owned vehicles. (Note: TIP does not own vehicles.)

CONSULTANT's insurance coverage shall be primary.

All above insurance policies shall be placed with insurers with a Best's rating of no less than A-VII. The insurer chosen shall also be licensed to do business in Florida.

The insurance policies procured shall be occurrence forms, not claims made policies.

The insurance companies chosen shall provide certificates of insurance prior to signing of contracts, to the Indian River County Risk Management Department.

The CONSULTANT shall ensure any subconsultants to maintain the insurance as detailed herein.

The Consultant shall indemnify and hold harmless the County and its commissioners, officers, employees and agents, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorney's fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the CONSULTANT and other persons employed or utilized by the CONSULTANT in the performance of the contract.

8. TERMINATION

This Agreement may be terminated: (a) by the COUNTY, for any reason, upon thirty (30) days' prior written notice to the CONSULTANT; or (b) by the CONSULTANT, for any reason, upon thirty (30) days' prior written notice to the COUNTY; or (c) by the mutual Agreement of the parties; or d) as may otherwise be provided below. In the event of the termination of this Agreement, any liability of one party to the other arising out of any Services rendered, or for any act or event occurring prior to the termination, shall not be terminated or released.

In the event of termination by the COUNTY, the COUNTY's sole obligation to the CONSULTANT shall be payment for those portions of satisfactorily completed work previously authorized. Such payment shall be determined on the basis of the percentage of work complete, as estimated by the CONSULTANT and agreed upon by the COUNTY up to the time of termination. In the event of such termination, the COUNTY may, without penalty or other obligation to the CONSULTANT, elect to employ other persons to perform the same or similar services.

The obligation to provide services under this Agreement may be terminated by either party upon seven (7) days prior written notice in the event of substantial failure by the other party to perform in accordance with the terms of this Agreement through no fault of the terminating party.

In the event that the CONSULTANT merges with another company, becomes a subsidiary of, or makes any other substantial change in structure, the COUNTY reserves the right to terminate this Agreement in accordance with its terms.

In the event of termination of this Agreement, the CONSULTANT agrees to surrender any and all documents first prepared by the CONSULTANT for the COUNTY in connection with this Agreement.

The COUNTY may terminate this Agreement for refusal by the CONSULTANT to allow public access to all documents, papers, letters, or other material subject to the provisions of Chapter 119 Florida Statutes and made or received by the CONSULTANT in conjunction with this Agreement.

The COUNTY may terminate this Agreement in whole or in part if the CONSULTANT submits a false invoice to the COUNTY.

CONSULTANT certifies that it and those related entities of CONSULTANT as defined by Florida law are not on the Scrutinized Companies that Boycott Israel List, created pursuant to s. 215.4725 of the Florida Statutes, and are not engaged in a boycott of Israel. COUNTY may terminate this Contract if CONSULTANT, including all wholly owned subsidiaries, majority-owned subsidiaries, and parent companies that exist for the purpose of making profit, is found to have been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel as set forth in section 215.4725, Florida Statutes.

CONSULTANT certifies that it and those related entities of CONSULTANT as defined by Florida law are not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, create pursuant to Section 215.473 of the Florida Statutes and are not engaged in business operations in Cuba or Syria. COUNTY may terminate this agreement if CONSULTANT is found to have submitted a false certification as provided under section 287.135(5), Florida Statutes, been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or been engaged in business operations in Cuba or Syria, as defined by section 287.135, Florida Statutes.

9. MISCELLANEOUS PROVISIONS

Independent Contractor. It is specifically understood and acknowledged by the parties hereto that the CONSULTANT or employees or sub-consultants of the CONSULTANT are in no way to be considered employees of the COUNTY, but are independent contractors performing solely under the terms of the Agreement and not otherwise.

Merger; Modification. This Agreement incorporates and includes all prior and contemporaneous negotiations, correspondence, conversations, agreements, or understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements, or understandings of any nature whatsoever concerning the subject matter of the Agreement that are not contained in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior or contemporaneous representations or agreements, whether oral or written. No alteration, change, or modification of the terms of this Agreement shall be valid unless made in writing and signed by the CONSULTANT and the COUNTY.

Governing Law; Venue. This Agreement, including all attachments hereto, shall be construed according to the laws of the State of Florida. Venue for any lawsuit brought by either party against the other party or otherwise arising out of this Agreement shall be in Indian River County, Florida, or, in the event of federal jurisdiction, in the United States District Court for the Southern District of Florida.

Remedies; No Waiver. All remedies provided in this Agreement shall be deemed cumulative and additional, and not in lieu or exclusive of each other or of any other remedy available to either party, at law or in equity. Each right, power and remedy of the parties provided for in this Agreement shall be cumulative and concurrent and shall be in addition to every other right, power or remedy provided for in this Agreement or now or hereafter existing at law or in equity or by statute or otherwise. The failure of either party to insist upon compliance by the other party with any obligation, or exercise any remedy, does not waive the right to so in the event of a continuing or subsequent delinquency or default. A party's waiver of one or more defaults does not constitute a waiver of any other delinquency or default. If any legal action or other proceeding is brought for the enforcement of this Agreement or because of an alleged dispute, breach, default, or misrepresentation in connection with any provisions of this Agreement, each party shall bear its own costs.

Severability. If any term or provision of this Agreement or the application thereof to any person or circumstance shall, to any extent, be held invalid or unenforceable for the remainder of this Agreement, then the application of such term or provision to persons or circumstances other than those as to which it is held invalid or unenforceable shall not be affected, and every other term and provision of this Agreement shall be deemed valid and enforceable to the extent permitted by law.

Availability of Funds. The obligations of the COUNTY under this Agreement are subject to the availability of funds lawfully appropriated for its purpose by the Board of County Commissioners of Indian River County.

No Pledge of Credit. The CONSULTANT shall not pledge the COUNTY's credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgment, lien, or any form of indebtedness.

Survival. Except as otherwise expressly provided herein, each obligation in this Agreement to be performed by CONSULTANT shall survive the termination or expiration of this Agreement.

Construction. The headings of the sections of this Agreement are for the purpose of convenience only, and shall not be deemed to expand, limit, or modify the provisions contained in such sections. All pronouns and any variations thereof shall be deemed to refer to the masculine, feminine or neuter, singular or plural, as the identity of the parties or parties may require. The parties hereby acknowledge and agree that each was properly represented by counsel and this Agreement was negotiated and drafted at arm's-length so that the judicial rule of construction to the effect that a legal document shall be construed against the draftsman shall be inapplicable to this Agreement.

Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original copy and all of which shall constitute but one and the same instrument.

10. Public Records Compliance

Indian River County is a public agency subject to Chapter 119, Florida Statutes. The Consultant shall comply with Florida's Public Records Law. Specifically, the Consultant shall:

- (1) Keep and maintain public records required by the County to perform the service.
- (2) Upon request from the County's Custodian of Public Records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 or as otherwise provided by law.
- (3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the County.
- (4) Upon completion of the contract, transfer, at no cost, to the County all public records in possession of the Consultant or keep and maintain public records required by the County to perform the service. If the Consultant transfers all public records to the County upon completion of the contract, the Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from the Custodian of Public Records, in a format that is compatible with the information technology systems of the County.

B. IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

(772) 226-1424

publicrecords@indianriver.gov

Indian River County Office of the County Attorney

1801 27th Street

Vero Beach, FL 32960

C. Failure of the Consultant to comply with these requirements shall be a material breach of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first written above.

COUNTY:

INDIAN RIVER COUNTY

By: _____
Susan Adams, Chairman

By: _____
John A. Titkanich, Jr., County Administrator

APPROVED AS TO FORM AND LEGAL SUFFICIENCY:

By: _____
William K. DeBaal, County Attorney

Ryan L. Butler, Clerk of Court and Comptroller

Attest: _____
Deputy Clerk

(SEAL)

Designated Representative:
Christopher Balter, Chief of Long-Range Planning
1801 27th Street, Vero Beach, FL 32960
cbalter@indianriver.gov
772-226-1250

CONSULTANT:

By: _____
(CONSULTANT)

(CORPORATE SEAL)

Attest _____

Address for giving notices:

License No. _____
(Where applicable)

Agent for service of process: _____

Designated Representative:

(If CONSULTANT is a corporation or a partnership, attach evidence of authority to sign.)

APPENDIX: RESUMES



JEFF MARCELL
Senior Partner
jeff@tipstrategies.com

EDUCATION

- ▶ Juris Doctorate, South Texas College of Law
- ▶ Bachelor of Arts, Political Science, University of Illinois at Chicago

EXPERTISE

- ▶ Policy development
- ▶ Competitive analysis and positioning
- ▶ Organization fundraising
- ▶ Change management
- ▶ Process reengineering

AFFILIATIONS

- ▶ Past Chair, Washington Economic Development Association
- ▶ Board and Executive Committee Member (former), Puget Sound Economic Development District Board
- ▶ Founding Board Member, Aerospace Futures Alliance
- ▶ Board Member (former), Washington Aerospace Partnership
- ▶ Board and Executive Committee Member (former) Seattle-King County Workforce Development Council
- ▶ Board Member (former), Seattle Metropolitan Chamber of Commerce
- ▶ Member (former), Multi-cultural & Small Business Task Force, Seattle Metro Chamber

ABOUT

As a principal, Jeff Marcell leads high-profile national consulting engagements and contributes to the strategic planning of the business.

EXPERIENCE

Before joining TIP, Jeff served as the president and CEO of the Economic Development Council of Seattle and King County (EDC). He was responsible for the organization's mission of business and job creation, retention, expansion, and recruitment in King County. Jeff joined the EDC in 2004, and during his tenure, rebuilt the organization's client-based economic development program.

Prior to joining the EDC, Jeff was an economic development consultant with Angelou Economics, and a marketing executive in the Economic Development Division of the Greater Houston Partnership. He was responsible for retaining and recruiting corporate expansions and relocations by marketing and promoting the Houston region nationally and internationally. During his term with the Partnership, the organization brought in over 25,000 jobs to the Houston region with \$3.4 billion in annual economic impact to the community.

In 2007, Jeff was named one of the Puget Sound Business Journal's 40 Under 40. In 2013, he received the MacArthur Award for Leadership from the Washington State Department of Commerce. He has been recognized by the IEDC for his efforts in Technology-Led Economic Development and Clean Technology and was the recipient of an Outstanding Board Service Award from the Seattle-King County Workforce Development Council, 2012.

SIGNIFICANT PROJECTS

- ▶ Led strategies for counties including Charleston and Greenville in South Carolina; Miami-Dade in Florida; Lewis, Kittitas, and Klickitat in Washington; and Oakland County in Michigan.
- ▶ Conducted strategies for regions in California's Central Coast (Santa Barbara and San Luis Obispo Counties); the Chicago, Illinois, area; East Central Michigan; North Iowa; Northwest Indiana.
- ▶ Drafted program and operation plans for the Delaware Prosperity Partnership, the Washington Military Alliance (on behalf of the Washington State Department of Commerce), and Newport County, RI.
- ▶ Conducted strategic planning for San Luis Obispo, CA; Miami-Dade County, FL; Minneapolis-St. Paul, MN; Detroit, MI; City of Auburn, WA; City of Corning, NY; Missouri City, TX; and City of Shelton, WA.
- ▶ Supervised the recruitment, retention, and expansion of 65 companies representing nearly 7,000 primary jobs in the Seattle region.



TRACYE MCDANIEL
President
tracye@tipstrategies.com

EDUCATION

- ▶ Bachelor of Science in Communications, University of Texas at Austin

EXPERTISE

- ▶ International and domestic market development
- ▶ Business recruitment, expansion, retention
- ▶ Economic development marketing
- ▶ Tourism development and marketing
- ▶ Fundraising strategies
- ▶ Workforce strategies
- ▶ Regional economic development
- ▶ State and regional public-private partnerships

AFFILIATIONS

- ▶ Member, US Department of Energy's Environmental Management Advisory Board
- ▶ Immediate Past Chair, International Economic Development Council
- ▶ Member, Texas Economic Development Council
- ▶ Fellow, Ford Foundation Regional Sustainable Development
- ▶ Board of Directors, NAIOP—New Jersey Chapter
- ▶ Appointed, Council on Innovation
- ▶ Appointed, New Jersey Military Installation Growth and Development Task Force
- ▶ Board member (former), Texas Economic Development Corporation

ABOUT

Tracye McDaniel is a recognized trailblazer who has led successful public and private economic development organizations at the state and regional level under five governors in two states. She has been a trusted advisor to CEOs, nonprofits, public organizations, and private enterprises for more than three decades. Tracye has earned a reputation of creating mutually beneficial strategic partnerships among leaders across a broad spectrum of industries.

EXPERIENCE

Prior to joining TIP Strategies, Tracye founded McDaniel Strategy Ecosystems and served as president/CEO for two separate state-level marketing and lead-generation organizations: first in New Jersey (where she was appointed by then newly elected New Jersey governor, Chris Christie, and business leaders to serve as the founding CEO of Choose New Jersey) and later in Texas (where she headed up the Texas Economic Development Corp.). Her expertise in international business development and marketing spans more than 50 countries.

Tracye also served as executive vice president and COO of the Greater Houston Partnership, Houston's most influential business organization. During her tenure she refined and implemented the organization's 10-year strategic plan and teamed with business leaders to raise more than \$32 million and to devise and execute Opportunity Houston, the organization's successful economic development global marketing and lead generation initiative.

Tracye is known for building accomplished teams that get results. She is a sought-after speaker, presenting to national and international audiences, and has published and appeared in global publications and news outlets. Tracye lives in Austin, Texas.

SIGNIFICANT PROJECTS

- ▶ **State and regional strategic planning:** Texas Association of Business; Greater Baltimore Committee (MD); Fort Bend County, TX; Greater Fort Wayne, Inc. (IN); Northeast Florida.
- ▶ **Organizational and entity development:** Department of Economic Equity and Opportunity, Harris County, TX; City of Dallas Economic Development Corporation (TX); Columbus Partnership (OH).
- ▶ **Facilitation:** First two cohorts of the International Economic Development Council's (IEDC's) Equitable Communities Initiative.
- ▶ **Economic development fundraising:** Opportunity Houston (TX), Choose New Jersey.
- ▶ **Public-private partnerships state/regional level:** Choose New Jersey, TexasOne (Texas Economic Development Corporation), and Greater Houston Partnership (TX).
- ▶ **Economic development marketing:** Texas Wide Open for Business, Office of the Governor Economic Development and Tourism.
- ▶ **Tourism development/marketing:** Texas: It's Like A Whole Other Country, Texas Department of Economic Development & Tourism.



JON ROBERTS
Managing Partner
jon@tipstrategies.com

EDUCATION

- ▶ Post graduate research, University of Oregon
- ▶ Master of Arts, Political Philosophy, University of Hawaii
- ▶ Bachelor of Arts, University of Hawaii

EXPERTISE

- ▶ International and domestic recruitment
- ▶ Regional economic strategies
- ▶ Venture capital and high-growth entrepreneurship
- ▶ Economic development marketing

AFFILIATIONS

- ▶ Fellow of the Washington World Affairs Council (Seattle)
- ▶ Economic Development Certification, National Development Council
- ▶ Member, Texas Economic Development Council
- ▶ Member, International Economic Development Council
- ▶ Board of Trustees (former), KMFA radio (Austin, Texas)

ABOUT

Jon Roberts has been a principal and managing partner at TIP Strategies since 2000. He helped transition the company from its Texas-based site selection practice to an economic strategy firm with major national recognition. His portfolio includes planning work from New York to California, with significant regional projects in the Mississippi Delta, Seattle's Puget Sound, and in the Great Lakes area.

EXPERIENCE

Prior to joining TIP, Jon was the director of business development first for the State of Washington and then under Governor Ann Richards for the State of Texas. During the transition to Governor Bush's tenure, he helped restructure the state's economic development organization and then co-authored the new strategic plan for the State of Texas. Jon also has deep ties to the state of Oregon. He was vice-president with the Oregon Technology Fund and was the lead investor for the Hood River Brewing Company (Full Sail), which continues to hold a prominent place in the craft brewing industry. He also managed two start-up technology companies: Fiberlite Composites and LifePort Inc. LifePort was subsequently acquired by Sikorsky.

Jon has served on the boards of several startup technology companies and on state task forces and gubernatorial committees. He has lectured in business at the University of Washington, the University of Texas, and was on the faculty at Marylhurst College in Portland, Oregon. Jon was also the founder of a mountain bike company in Portland: the Fat Tire Farm, which now operates multiple retail outlets.

Born and raised in Germany, Jon has traveled extensively throughout Europe and Asia. He resides in Austin but spends his summer in Bend, Oregon.

SIGNIFICANT PROJECTS

- ▶ **State and regional economic development planning:** Texas Higher Education Foundation; Mississippi; Puget Sound Regional Council (WA); Delta Regional Authority (multi-state); Gulf Coast Community Foundation (MS).
- ▶ **Countywide economic development planning:** Jackson County, MS; Chester County, PA; Forsyth County, GA; Jefferson Parish, LA; Montgomery County, MD; Green Bay, WI; Wausau, WI.
- ▶ **Citywide economic development planning:** Fort Collins, CO; Clearwater, FL; Redmond, WA; McKinney, TX.
- ▶ **Comprehensive economic development strategies:** Association of Central Oklahoma Governments; Richmond, VA.
- ▶ *Envision Central Texas* project for regional planning in the Austin Metro area.
- ▶ State of Texas Strategic Economic Development Plan.
- ▶ Recruitment of Matsushita Semiconductor (NSC) to Washington.



TOM STELLMAN
CEO/Founder
tom@tipstrategies.com

EDUCATION

- ▶ Bachelor of Arts, Government, University of Texas at Austin

EXPERTISE

- ▶ International and domestic recruitment
- ▶ Talent management and workforce development
- ▶ Regional economic strategies
- ▶ Automotive supplier strategies
- ▶ Defense-dependent communities

AFFILIATIONS

- ▶ Board of Directors (former), Texas Economic Development Council
- ▶ Advisory Board Member (former), Community Development Institute
- ▶ Board Member (former), Camino Real Export Council
- ▶ Board Member (former), Center for International Business and Economic Research at the University of Texas at Austin
- ▶ Instructor, Texas Basic Economic Development Course

ABOUT

Tom Stellman is founder of the consultancy and leads high-impact project engagements throughout the country. As developer of TIP's model of Talent, Innovation, and Place, he helps clients identify their core value and build consensus around strategies to promote economic health. He is the lead author of TIP's Automotive Profile, the Invest in Texas Business Guide, and the Texas Manufacturing Skills Gap.

EXPERIENCE

Over the last decade, Tom has led defense-related engagements, including the preparation of a statewide defense diversification strategy for MassDevelopment; an economic growth strategy for the bi-state region surrounding Fort Campbell; and an economic diversification plan for Eastern Kern County, CA. He has also expanded the firm's workforce practice, including talent-driven analyses and strategies for regional organizations in Tampa Bay, Houston, Milwaukee, El Paso, and South Carolina.

In addition to leading consulting engagements, Tom developed and launched the Invest in Texas Alliance, a marketing initiative sponsored by 26 economic development agencies and electric utilities. His team targeted both domestic and international growth companies through a unique mix of direct marketing and networking, resulting in over \$3 billion in investment leads and the location of 15 companies.

Prior to establishing TIP, Tom was director of the Office of International Business for the Texas Department of Commerce, where his team was charged with promoting the state's exports, marketing the state to foreign investors, and facilitating communication between foreign investors and economic development organizations statewide. He also served as staff to the Texas Mexico Authority and as border development coordinator for the state. A Texas native, Tom lives in Austin with his wife and their four children.

SIGNIFICANT PROJECTS

- ▶ **Statewide planning:** Texas Workforce Commission, Economic Development Districts of Idaho, Idaho Department of Commerce, Oregon Talent Council.
- ▶ **Economically driven strategies for workforce boards:** Western Kentucky Workforce Investment Board; Workforce Solutions of Central Texas, Rural Capital Area, North Central Texas, and Lower Rio Grande Valley (TX); Clarksville-Montgomery County, TN.
- ▶ **Regional planning and targeting analysis:** Tampa-Hillsborough, FL; Bismarck-Mandan and Greater Fargo Moorhead, ND; WIRED 26-county region (Louisville, KY/IN area).
- ▶ **Defense-related work:** State of Massachusetts; Fort Campbell (KY); Kern County, CA; Fort Hood (TX); Sheppard AFB (TX); Anniston Army Depot (AL); Eglin AFB (FL).
- ▶ **Rural entrepreneurship assessments:** Northeast Texas and Southwest Arkansas.
- ▶ **Marketing initiative:** Invest in Texas Alliance.



VICTORIA WILSON
Consultant
victoria@tipstrategies.com

EDUCATION

- ▶ Master of Public Affairs, University of Texas at Austin
- ▶ Bachelor of Arts, Philosophy and German, Colgate University

EXPERTISE

- ▶ Local & regional economic development
- ▶ Project management
- ▶ Freight and transportation planning
- ▶ International trade
- ▶ Binational logistics hubs and corridors
- ▶ Affordable housing policy
- ▶ Data analysis
- ▶ Policy analysis
- ▶ Written deliverables in Spanish and English

ABOUT

Victoria Wilson has experience leveraging qualitative and quantitative datasets to develop original insights. She has worked with government agencies, legislators, and industry leaders to deliver collaborative policy solutions to complex problems.

EXPERIENCE

Prior to joining TIP Strategies, Victoria was a policy manager in the affordable housing space. In this role, she worked with industry leaders and legislators to develop policy positions and strategy. She has also worked as a transportation researcher focused on freight and trade policy, as well as transportation planning, in Texas. Her experience includes policy and data analysis, writing research reports, and engaging with local, state, and federal stakeholders in both Spanish and English to promote collaboration in planning efforts.

Victoria received a Master of Public Affairs from the University of Texas' Lyndon B. Johnson School of Public Affairs and a Bachelor of Arts in Philosophy and German from Colgate University.

SIGNIFICANT PROJECTS

- ▶ Regional and local economic development plans for McAllen (TX), Kittitas County (WA), Pinellas County (FL), the Texas Association of Business, and the Delaware Business Roundtable.
- ▶ Contributed to development, tracking, and visualization of public-facing performance metrics for the Texas Department of Transportation.
- ▶ Co-authored research on last-mile logistics and delivery driver job satisfaction.
- ▶ Conducted research about the impacts of demographic changes on transportation corridors and local economies in Texas.
- ▶ Evaluated community impacts of cross-border trade.
- ▶ Led research about the impacts of technology on the supply chain industry.
- ▶ Co-led Low Income Housing Tax Credit education campaign during the 87th Texas Legislative Session.



ELIZABETH SCOTT
Senior Consultant
elizabeth@tipstrategies.com

EDUCATION

- ▶ Master of Natural Resources, Environmental & Land Use Policy, Virginia Tech
- ▶ Bachelor of Arts, History and Sociology, University of Tampa

EXPERTISE

- ▶ Regional & Comprehensive Economic Development Strategic Plans (CEDs)
- ▶ Economic development organizational strategic plans
- ▶ Domestic & international business recruitment
- ▶ Talent attraction strategy
- ▶ Project management
- ▶ Target industry & industry cluster analysis
- ▶ Policy analysis
- ▶ Socioeconomic & fiscal impact analysis

AFFILIATIONS

- ▶ Member, Michigan Economic Developers Association
- ▶ Former member, Port of Portland International Air Service Executive Committee
- ▶ Former vice chair, Leadership Clark County
- ▶ Former member, Clark County Railroad Advisory Board

ABOUT

Elizabeth Scott has nearly 20 years of experience managing a wide range of projects including business recruitment and retention, economic and workforce development strategy, socioeconomic impact studies, and land use studies. She works closely with community, business, and academic leaders to develop comprehensive strategies that advance equitable economic growth and foster a high quality of place.

EXPERIENCE

Prior to joining TIP, Elizabeth spent seven years with the Columbia River Economic Development Council (CREDC) in Clark County, WA. As the director of business development, she led the business services team executing the strategy for business recruitment, retention, and expansion efforts. In this role, she managed over 20 successful projects including Vigor Industrial, Banfield Pet Hospital Corporate Headquarters, RealWear, and GTMA. Areas of focus include site selection, permitting processes, incentives negotiation, higher education engagement, and workforce development. During her tenure with CREDC, she successfully managed a number of grant programs, including a four-year, \$5 million grant from five federal agencies as part of the Advanced Manufacturing Jobs and Innovation Accelerator Challenge (AMJIAC) program for the five county, bi-state Greater Portland-Vancouver Region.

In addition to her economic development expertise, she has experience in business development, project management, and research and data analysis. Early in her career, she supported BRAC/NEPA projects by providing socioeconomic analysis for environmental assessments and environmental impact statements.

Elizabeth resides in Houghton, Michigan.

SIGNIFICANT PROJECTS

- ▶ Large scale regional economic development plans for urban and rural communities across the US, including San Luis Obispo-Santa Barbara (CA), Jacksonville (FL), Oklahoma City (OK), Indianapolis (IN), and Spokane (WA).
- ▶ Completed organizational strategies for economic development entities in Tampa Bay (FL) and Miami (FL).
- ▶ Led statewide strategic planning work in Michigan and Montana.
- ▶ Led and supported over 20 successful recruitment and expansion projects, including corporate headquarters relocations.
- ▶ Led Greater Portland AMJIAC & JIAC CTA Federal Grant Programs.
- ▶ Implemented Target Industry Growth Strategy for Clark County (WA).
- ▶ Implemented Foreign Direct Investment Strategy for Clark County within the Greater Portland Region.



BRENT MCELREATH, AICP
SVP, Research & Development
brent@tipstrategies.com

EDUCATION

- ▶ Master of Science, Community & Regional Planning, University of Texas at Austin
- ▶ Bachelor of Business Administration, Finance, University of Texas at Austin

EXPERTISE

- ▶ Regional and metropolitan economics
- ▶ Economic development strategy
- ▶ Real estate and property market fundamentals
- ▶ Infrastructure analysis
- ▶ Capital and financial analysis

AFFILIATIONS

- ▶ Member, American Institute of Certified Planners
- ▶ Member, American Planning Association
- ▶ Past Member, Urban Land Institute

ABOUT

Brent McElreath has more than 25 years of experience in comparative urban economic analysis. He has managed research teams in both the public and private sectors and has extensive work experience in real estate and infrastructure markets, with a focus on their cyclical and structural drivers. During his career he has spearheaded innovations in scenario modeling, fiscal impact analysis, and data collection and reporting systems. Brent has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets during his career.

EXPERIENCE

As a vice president at MSCI, Brent designed and implemented performance monitoring systems for metropolitan property markets. He also developed and authored publications explaining differences in investment risks across property types, metropolitan areas, and national markets. His graphical analysis became a fixture of MSCI's annual property market review presentations in North America, Europe, and the Asia Pacific region.

While at PPR (now CoStar), Brent supervised the publication of 250+ quarterly property market forecasts. He also oversaw the modernization of PPR's data collection systems and led the firm's initial groundwork in global risk analysis.

Brent's career began in economic development in Texas in the 1990s. He brings this background to his current role at TIP, combined with extensive experience in the dynamics of real estate, infrastructure, and capital markets.

Brent is a member of the American Planning Association and an AICP-certified planner.

SIGNIFICANT PROJECTS

- ▶ **Strategic planning:** Greater Baltimore Committee (2024); Chicago Metropolitan Agency for Planning (2022); Indianapolis Metropolitan Planning Organization (2022); Virginia Beach, VA (2021); Tampa Bay Economic Dev. (2019); Fort Worth, TX (2017).
- ▶ **Prioritization models:** global port investment, for Deutsche Bank (2009); global agricultural markets, for Southern United States Trade Association, (2007); global city office markets, for Mitsui Fudosan (2004).
- ▶ **Property sector dynamics:** European industrial property, for IPD (2013); Asian retail property, for Prudential (2013), US residential property, for Michigan Office of Retirement Services (2001).
- ▶ **Selected publications:** *Global Property Performance* (2016); *The Road to a Seamless Global Real Estate Portfolio* (2016); *Sectoral Aspects of Global Infrastructure Investment* (2015); *Global Infrastructure Investment: An Overview of the Institutional Landscape* (2014); "Global Real Estate Risk Index," RE/PS 6.6 (2002).



EVAN JOHNSTON
Senior Analyst
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EDUCATION

- ▶ Bachelor of Arts, Economics and Psychology, University of Texas at Austin
- ▶ Bachelor of Science, Mathematics, University of Texas at Austin

EXPERTISE

- ▶ Regional labor market analysis
- ▶ Data manipulation and visualization
- ▶ Statistical analysis
- ▶ Quantitative and qualitative research

ABOUT

Evan Johnston works with principals and consultants to collect, organize, and analyze data for clients. He helps the project team to find reputable, reliable data and to distill them into meaningful analyses used in reports and presentations. He specializes in data visualization, economic analysis, and labor market research with an emphasis on equitable workforce development and resiliency.

EXPERIENCE

Before joining TIP, Evan worked as a social science research associate at the IC² Institute and the McCombs School of Business at the University of Texas at Austin on research projects examining labor market dynamics and entrepreneurship.

Evan holds a Bachelor of Arts in Economics and Psychology and a Bachelor of Science in Mathematics from the University of Texas at Austin. He also completed certificates in applied statistical modeling, computer science, and business during his undergrad.

SIGNIFICANT PROJECTS

- ▶ Developed TIP Strategies' Occupational Risk Tool and Job Quality & Access Analysis, two dynamic analytical tools that estimate aspects of workers' risk during the COVID-19 pandemic as well as job quality and access more broadly.
- ▶ Talent Migration: Analyzed federal data tracking worker separations and hires to create an interactive analytical tool describing worker migration trends across the US.
- ▶ Workforce housing: National League of Cities, pilot project on affordable housing on behalf of the Mid-America Regional Council (MARC) which serves the Kansas City area.
- ▶ Job Polarization in Austin: Co-author of Echeverri-Carroll, Oden, Gibson, & Johnston (2018) "Unintended consequences on gender diversity of high-tech growth and labor market polarization" in *Research Policy*.
- ▶ Austin's Entrepreneurial Ecosystem: Contributed to a Kauffman Foundation-funded study of Austin's entrepreneurial ecosystem. Acknowledgement of contributions in Echeverri-Carroll and Feldman (2018) "Chasing entrepreneurial firms" in *Industry and Innovation*.



AJAY KASTURIRANGAN
Analyst
ajay@tipstrategies.com

EDUCATION

- ▶ Master of Science, New York University Center for Urban Science + Progress
- ▶ Bachelor of Technology, Manipal Institute of Technology

EXPERTISE

- ▶ Data Science
- ▶ Machine Learning
- ▶ Big Data Management
- ▶ Urban Informatics
- ▶ Dashboarding

ABOUT

Ajay Kasturirangan works with the firm’s Research and Development team. His responsibilities include using data-driven methods to develop tools and dashboards to track economic metrics both quantitatively and qualitatively for the client.

EXPERIENCE

Prior to joining TIP, Ajay worked as a course assistant for a *Machine Learning for Cities* course at New York University (NYU). Prior to that he worked as a data analyst in the insurance industry, crafting enterprise-level dashboards and working extensively with sales, risk, and financial data.

Ajay holds a Master of Science from NYU’s Center for Urban Science + Progress, where he studied how to use data science and machine learning techniques to solve critical problems in cities.

SIGNIFICANT PROJECTS

- ▶ Presented a research study at the Applied Urban Science Conference 2023, analyzing the patterns of head and eye coordination in low vision individuals in New York City.
- ▶ Developed a machine learning model to predict gross domestic product of US counties based on night light emission image data using open-source tools.
- ▶ Created a report about how government agencies can use technology to improve the state of public toilets in New York City.



REECE NEATHERY
Analyst
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EDUCATION

- ▶ Master of Urban Planning, Texas A&M University
- ▶ Bachelor of Science, Geography with a minor in Mathematics, University of Alabama

EXPERTISE

- ▶ Geospatial analysis
- ▶ Land use planning
- ▶ Data finding summarization
- ▶ Walkability and placemaking

ABOUT

Reece Neathery works on TIP's Research and Development team, gathering and analyzing data to provide clear communication between consultants and project stakeholders. He specializes in GIS mapping and analysis, using maps to effectively convey the story being told by a dataset.

EXPERIENCE

Prior to joining TIP, Reece worked as a research assistant at the Texas Real Estate Research Center at Texas A&M University, using GIS software to provide mapping and data visualization of various land use and property characteristics, later automating some of these processes for replication.

Additionally, Reece has worked on several long-term planning projects for various rural communities across Texas with Texas Target Communities. This has included developing long-term transportation and economic development plans, based heavily on stakeholder engagement. He brings with him several years of GIS and demographics analysis experience, especially in the context of planning and real estate.

SIGNIFICANT PROJECTS

- ▶ Participation in development of long-term growth management plans for various rural communities across Texas.
- ▶ Automation of quarterly commercial maps illustrating real estate trends in major Texas metro areas at Texas Real Estate Research Center.
- ▶ Contribution to various urban economics and real estate-focused articles published in Texas Real Estate Research Center's *Tierra Grande* magazine.
- ▶ Graduate-level research on placemaking and walkability in regions of extreme heat.



KAREN BEARD
SVP, Production
karen@tipstrategies.com

EDUCATION

- ▶ Master of Science, Community & Regional Planning, University of Texas at Austin
- ▶ Bachelor of Arts, Sociology, University of Texas at Austin

EXPERTISE

- ▶ Survey research
- ▶ Regional economic analysis
- ▶ Workforce and higher education analysis
- ▶ Writing and editing

AFFILIATIONS

- ▶ Instructor, Texas Basic Economic Development Course

ABOUT

Karen Beard has 30 years of experience thinking about economic development and community planning from a data, policy, and strategy perspective. Since joining TIP in 2000, she has filled both client-facing and “home team” roles for the firm. As a research associate and then a consultant, she managed client engagements in Texas and across the US, including a focus on helping clients understand their workforce. In her current role as senior vice president of production, Karen helps coordinate the firm’s client deliverables.

EXPERIENCE

Prior to joining TIP, Karen held the position of senior research analyst at the Texas Department of Economic Development. During her tenure at TDED, she was involved in a number of projects, including the design and maintenance of the agency’s “one stop” economic development web sites. In this capacity, she served as the principal developer of the Texas Business & Community Economic Development Clearinghouse, a searchable database of economic development resources.

As a research associate for the State Bar of Texas, Karen analyzed subjects of interest to the legal services industry and participated in dozens of law-related survey research projects, including an extensive annual report on attorney fees and compensation, as well as an award-winning survey on the concerns of minorities in the legal profession. She has also conducted research on the disability community for the Texas Rehabilitation Commission and led a major household travel survey as a research manager for NuStats, an Austin-based transportation research firm. Other topics that she has addressed include the evaluation of manufacturing technology centers and the effect of regulation on the cost of land development.

SIGNIFICANT PROJECTS

- ▶ **Regional economic development planning:** Green River Area Development District, KY; WIRED 26-county region, KY/IN; Racine County EDC, WI.
- ▶ **Defense-dependent communities:** Anniston Army Depot, AL; Fort Hood, TX; Fort Campbell, KY.
- ▶ **Workforce projects:** Workforce Solutions of Central Texas; Western Kentucky Workforce Investment Board; Pearland Economic Development Corporation (TX); Workforce Solutions Lower Rio Grande Valley (TX).



MEREDITH EBERLE
Senior Graphic Designer
meredith@tipstrategies.com

EDUCATION

- ▶ Bachelor of Arts, Photography, University of North Texas
- ▶ Undergraduate Studies, Photography, School of the Art Institute of Chicago

EXPERTISE

- ▶ Engaging designs for complex content
- ▶ Document quality control
- ▶ Custom visual content (infographics, maps, and illustrations)
- ▶ Thought-provoking presentations

ABOUT

Meredith Eberle has over 20 years of graphic design and administrative experience in industries ranging from survey research to education. As TIP's graphic designer, Meredith draws on both her career experience and fine-arts education to help shape the look and feel of TIP's presentations and deliverables. Her contributions include design and layout; custom infographics, maps, and illustrations; and other creative digital and print media.

EXPERIENCE

Before joining TIP, Meredith worked in creative and administrative capacities for private education firms. She studied at The School of The Art Institute of Chicago and the University of North Texas, graduating with honors. Meredith also received a Bachelor of Arts in Photography with a minor in Social Science.

SIGNIFICANT PROJECTS

- ▶ Design of presentation on disruptive technology delivered to the International Economic Development Council; also delivered as a webinar and made available for purchase through the organization's online store.
- ▶ Design of presentation on economic equity and inclusion for the Texas Economic Development Council's COVID-19 response webinar series, available for purchase through the organization's online store.
- ▶ *Allen County Together*, an economic development action plan for Greater Fort Wayne, Inc. (IN), designed in the client's branding that showcased the county's quality of place and unique assets.
- ▶ *THRIVE Spokane*, a regional CEDS and resilience framework designed in the client's branding, communicating a collective vision for equitable and sustainable economic prosperity across Spokane County (WA).
- ▶ *Inclusive Growth Analysis* for the Chicago Metropolitan Agency for Planning (CMAP) region designed in TIP's branding.



TINA AVENT
Designer
tina@tipstrategies.com

EDUCATION

- ▶ Associate degree in UI/UX, Austin Community College (Austin, Texas)
- ▶ Studied graphic design and photography at the University of North Texas (Denton, Texas)

EXPERTISE

- ▶ Tableau interface and design
- ▶ Adobe Creative Suite
- ▶ Typography
- ▶ Web development, design, and SEO
- ▶ User experience design
- ▶ Accessibility

ABOUT

Tina Avent has nearly two decades of experience as a dedicated and innovative graphic designer. As a designer at TIP, Tina assists with the preparation of client deliverables and presentations, creating and maintaining design assets, and designing and packaging the firm's Tableau deliverables. She brings expertise in user interface (UI) and user experience (UX) and has developed an expertise in ensuring TIP's deliverables comply with accessibility standards.

EXPERIENCE

Prior to joining TIP, Tina held graphic design positions with International Conference Management, Inc. (a national convention and trade show producer) and OnRamp Access (now LightEdge, a high security data center and internet services company). During her tenure at each firm, she worked cohesively with creative, sales, operational, and leadership professionals to align goals and enhance the company's image. Before working as the lead graphic designer for OnRamp for nearly seven years, Tina spent more than a decade as a web developer for OnRamp clients, including the Texas Secretary of State and Railroad Commission. Through this experience she gained a proficiency in digital, print, tradeshow, and overall branding design, as well as exceptional front-end development skills.

SIGNIFICANT PROJECTS

- ▶ Collaborated on asset management, design, and layout to create *Growing with Vision*, a regional development plan for Northeast Indiana Regional Development Authority that has brought critical investment to the region.
- ▶ Improved ADA accessibility adherence for deliverables, including the Pinellas, Florida, Comprehensive Economic Development Strategic Plan.
- ▶ Improved usability for data deliverables through collaboration with TIP's research and development team.
- ▶ Conducted user research for an accessibility project for Austin-Bergstrom International Airport.



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