

# Revenue Development Re-bid

Proposal for the City of Allentown

Date: July 10, 2024



RFP #2024-30

Submitted to

City of Allentown  
435 Hamilton Street  
Allentown, PA 18101

Submitted by

Econsult Solutions, Inc.  
1435 Walnut Street, 4th Floor  
Philadelphia, PA 19102



## Solutions for

- | ECONOMIC DEVELOPMENT
- | EQUITY AND INCLUSION
- | GOVERNMENT AND PUBLIC POLICY
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- | FINANCIAL MODELING AND MARKET ANALYSIS
- | GEOSPATIAL ANALYSIS
- | IMPACT ANALYSIS
- | PERFORMANCE BENCHMARKING
- | PREDICTIVE AND SCENARIO ANALYSIS
- | STATISTICAL AND BIG DATA ANALYSIS
- | STRATEGIC PLANNING AND FACILITATION
- | SURVEYS AND PRIMARY RESEARCH

July 10, 2024

Sarrah McNeil, Purchasing Agent  
Purchasing Office  
City of Allentown  
435 Hamilton Street  
Allentown, PA 18101-1699  
Via email: [Sarrah.mcneil@allentownpa.gov](mailto:Sarrah.mcneil@allentownpa.gov)

Dear Ms. McNeil,

On behalf of Econsult Solutions, Inc. (ESI), I am pleased to submit this proposal to the Gateway Area Development District (GADD) to conduct an economic impact study of the current state of childcare availability and its effect on the workforce and economy within the five-county region.

ESI has deep experience studying policy issues and approaches related to barriers to workforce participation. Our approach to these assignments is supported by our broader experience in economic development and workforce planning, with policy analysis and recommendations situated within the broader goals of the community.

Our approach to this assignment will build on our team's decades of experience conducting economic studies for government and quasi-government entities, nonprofit organizations, and public and private firms. We have worked across a variety of community types and contexts and take a customized approach to each study reflective of the available information and community conditions. We know that our work must be situated within the economic, policy, and institutional landscape to produce actionable recommendations that reduce economic insecurity and enhance quality of life.

The ESI team consists of experienced professionals with backgrounds in economic and social analysis, policy and program evaluation, performance measurement, and economic development strategy. We combine academic-level rigor with real-world experience to provide clients with a wide range of evidence-based analyses, strategic advice, planning, and presentation.

Included in this submission is a description of our approach to the assignment, as well as information on our anticipated project team and relevant engagements our firm has conducted in recent years.

Sincerely,



Ethan Conner-Ross, Executive Vice President & Principal  
[ConnerRoss@econsultsolutions.com](mailto:ConnerRoss@econsultsolutions.com) | 215-717-2777

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# 1. IBE Preference

Econsult Solutions, Inc. (ESI) is a boutique consultancy providing analysis and insights at the intersection of economics, planning, and public policy. We leverage the skills and experience of our team to help our clients find practical solutions to their complex challenges. ESI provides non-profit organizations, businesses and public policy makers with economic consulting services and advisory services in the following practice areas:

- Economic Development
- Equity & Inclusion
- Government & Public Policy
- Litigation Support
- Real Estate
- Thought Leadership
- Transportation & Infrastructure
- Universities & Hospitals

The firm has deep expertise in urban economics and the interrelated issues of equitable economic development, human capital, infrastructure, and land use in cities and metropolitan regions. Our interdisciplinary team of economists, planners, and policy experts bring a unique combination of quantitative skills and expertise to deliver rigorous analysis and solutions. Our clients include government and quasi-government organizations, private sector businesses, economic development agencies, and research organizations, with much of our work occurring at the intersection of the public and private sector.

ESI applies our expertise and interdisciplinary approach to help improve the environments in which we work and live. Staff members have outstanding credentials, including active positions at the university level, hands on experience within the public policy process, and extensive consulting experience. The diverse skills sets of our staff and advisory board enable us to leverage appropriate subject matter expertise, technical skills and experience for each engagement.

The firm is a certified small business and S-Corporation organized under the laws of the Commonwealth of Pennsylvania that works nationally and internationally to offer a one-of-a-kind blend of cross-discipline experience and strategy. Based in Philadelphia, ESI supports clients nationwide. The 'Econsult' business has been in continuous operation since 1979 with the founding of Econsult Corporation.



The firm has been recognized as one of the fifty most community-minded companies in Pennsylvania, New Jersey, and Delaware in 2021, 2022, 2023, and 2024 by the Civic 50 of Greater Philadelphia.

For more information, please visit [www.econsultsolutions.com](http://www.econsultsolutions.com)

# NOTICE OF SMALL BUSINESS SELF-CERTIFICATION



The Department is pleased to announce that  
**ECONSULT SOLUTIONS INC**

has successfully completed the Pennsylvania Department of General Services' process for self-certification as a small business under the Commonwealth's Small Business Contracting Program, with the following designation:

BUSINESS TYPE(s):

**Procurement Services**

CERTIFICATION NUMBER: **406786-2023-03-SB**

CERTIFICATION TYPE: **SMALL BUSINESS**

ISSUE DATE: **03/07/2023**

EXPIRATION DATE: **03/07/2025**

RECERTIFIED DATE:

A handwritten signature in black ink that reads "Kerry L. Kirkland". The signature is written in a cursive style with a large, looped "K" and "L".

Kerry L. Kirkland, Deputy Secretary  
Bureau of Diversity, Inclusion & Small Business Opportunities

## 2. Experience and Qualifications

### 2.1. ESI's Government & Public Policy Practice



Sound fiscal policy is critical for any jurisdiction to generate growth while providing needed services. ESI's modeling of revenue and expenditure options, including direct and indirect impacts from current and potential tax policies provides the intelligence needed to help jurisdictions chart a secure and equitable fiscal course. ESI also conducts high quality research support for foundations, academic institutions, advocacy groups and industry collectives, as well as other organizations seeking to inform policymakers through evidence-based research and insights.

Our team comes with decades of experience in tax policy, real estate financial analysis, and strategic planning. ESI's comprehensive knowledge and reputation in these fields differentiates us from competing vendors. The firm's staff consists of seasoned professionals that provide the highest levels of technical expertise in economics, analytics, and thought leadership. Our team includes policy strategists with experience in government agencies, academia, and the private sector, in addition to seasoned economists with expertise in data analysis and a focus on economic insecurity, workforce evaluation, and fiscal policy.

Our anticipated project staff have a deep familiarity with urban revitalization efforts and a variety of incentive programs such as property tax abatements, Tax Increment Financing (TIF), federal Empowerment Zones, state-designated enterprise zones, Pennsylvania Keystone Opportunity Zones (KOZ), business improvement districts (BIDs), Neighborhood Improvement District (NID) plans, and special assessment districts.

ESI's rigorous analyses can help to define the importance of issues and inform successful policy formation. Our engagements include qualitative and quantitative assessment of the impacts of incentive programs on property values, employment construction costs, and local tax systems. They have also included analyses of economic impacts of local taxes on economic activity, evaluation of alternative tax structures for school finance, assessments of public investments in economic development activities, and analyses of the factors affecting the productivity of government agencies and public authorities.

## 2.2. Anticipated Project Staff

To ensure the City of Allentown is provided with the appropriate skills and knowledge required to successfully complete this assignment, we have assembled a team that offers a diverse and multifaceted perspective, along with an intimate understanding of the complex political issues at stake.

The project will be led by Ethan Conner-Ross, Executive Vice President and Principal of Econsult Solutions. Mr. Conner-Ross will serve as principal-in-charge, responsible for all work to be performed throughout this engagement. His practice areas include public policy, transportation, tourism, economic development, and strategic planning. He has led a range of projects for ESI, helping governmental, quasi-governmental, and private sector organizations maximize and articulate public benefits. Policy issues of focus include economic insecurity, transportation, fiscal sustainability, affordable housing, and economic development.

ESI Vice President Brian Licari and ESI Associate Director Cameron Miller will serve as project managers coordinating day-to-day research activities, as well as serving as primary points of contact between the research team and the City. Mr. Licari's career background and interests are in analyzing, developing, and implementing economic development and community revitalization strategies ranging in scale from the grassroots neighborhood level to regional business development efforts. With direct work experience in the public, private, nonprofit, and academic sectors, he has a deep understanding of the needs and motivations of stakeholders at different levels of local, regional, state, and national involvement.

Mr. Miller has a history of working across the public sector, having held positions in city government, higher education, and nonprofit organizations. Prior to joining the firm, he served as the Director of Operations for the City of Philadelphia's Rebuild Initiative, a mayoral program funded by the Philadelphia Beverage Tax investing \$500 million in parks, playgrounds, recreation centers, and libraries in underserved Philadelphia neighborhoods. Joining early in its launch phase, Mr. Miller was key to developing the startup department and managed program policies, processes, data, reporting, and program evaluation efforts.

The participation of senior staff throughout an engagement ensures that insights gathered from all tasks flow through the development of strategic objectives and recommendations. Additional project staff from ESI will provide supporting analysis, research, and technical expertise. Included in this proposal are brief descriptions of our anticipated project team members which outline their strengths and capabilities as they relate to this project.

## Ethan Conner-Ross, M.P.A.

Executive Vice President & Principal; *Principal-in-Charge*



### Areas of Expertise

Public Policy

Transportation

Travel and Tourism

Economic Impact

Strategic Planning

Financial Modeling

### Education

M.P.A.,  
University of Pennsylvania

B.A., History and Political Science,  
Amherst College

Ethan Conner-Ross is an executive vice president and principal at ESI. He has led a range of projects for ESI helping governmental, quasi-governmental, and private sector organizations maximize and articulate public benefits. Policy issues of focus include economic insecurity, transportation, fiscal sustainability, affordable housing, and economic development. He has presented and testified before public bodies including the Philadelphia City Council, Pennsylvania legislative committees and task forces, in addition to numerous events and conferences.

Prior to joining ESI, Mr. Conner-Ross worked at Visit Philadelphia, a nonprofit tasked with promoting tourism to the Greater Philadelphia region. As Vice President of Research and Planning, he directed the organization's market research program, led company-wide planning, coordinated the development of the organization's five-year strategic plan, and supported corporate communications efforts.

### Current Position

**Executive Vice President & Principal**, Econsult Solutions, Inc. 2024-Present  
Philadelphia, PA

### Past Positions

**Senior Vice President & Principal**, Econsult Solutions, Inc. 2020-2024  
Philadelphia, PA

**Vice President & Principal**, Econsult Solutions, Inc. 2019-2020  
Philadelphia, PA

**Director**, Econsult Solutions, Inc. 2014-2019  
Philadelphia, PA

**Vice President of Research and Planning**, Visit Philadelphia 2011-2013  
Philadelphia, PA

**Research Director**, Research Associate, Visit Philadelphia 2006-2011  
Philadelphia, PA

### Select Project Experience

**Bucks County Tourism Product Assessment:** Strategic assessment of the visitor-facing product and tourism infrastructure in Bucks County, PA.

**Tourism as an Economic Engine for Greater Philadelphia:** Led studies of the economic and fiscal impacts and the benefits to residents of increasing tourist activity and spending in the Philadelphia region.

## Brian Licari

Vice President; *Project Manager*



Brian Licari is a vice president at ESI. His career background and interests are in analyzing, developing, and implementing economic development, community revitalization, and real estate strategies ranging in scale from the grassroots neighborhood level to regional business development efforts. With direct work experience in the public, private, nonprofit, and academic sectors, he has a deep understanding of the needs and motivations of stakeholders at different levels of local, regional, state, and national involvement.

### Areas of Expertise

Project Management

Data Analysis

Economic Development

Urban Planning

Impact Analysis

Mr. Licari has extensive experience working with multidisciplinary project teams and distilling and communicating complex information to support policy and decision making. He thrives at all levels of communication, including community and stakeholder engagement, client management, training facilitation, staff mentoring, presentation material development, public speaking, and technical writing.

### Education

Certificate in Commercial Real Estate, Cornell University  
2021

Certificate in Geospatial Analysis & Visualization, University of Illinois at Chicago  
2010

M.A., Urban Planning, Robert F. Wagner School of Public Service, New York University  
2005

B.A., Psychology, University of North Carolina at Chapel Hill  
2000

### Current Position

**Vice President**, Econsult Solutions, Inc. 2024-Present  
Philadelphia, PA

### Past Positions

**Director**, Econsult Solutions, Inc. 2023-2024  
Philadelphia, PA

**Senior Associate**, Development Strategies, Inc. 2011-2023  
Philadelphia, PA/ St. Louis, MO

**Government Services Consultant**, Bronner Group LLC, 2008-2009  
Chicago, IL

**Implementation Specialist, Operations Redesign**, New York City Department of Buildings, New York, NY 2005-2008

### Select Project Experience

#### **Economic Impact of The Philadelphia Orchestra and Ensemble Arts:**

Analyzed the economic and tax impacts of operations and visitor spending in Philadelphia and Pennsylvania.

#### **Economic Impact of the Film Industry and MEDIA Act in Montana:**

Analyzed the economic and tax impacts of aggregate film production activities in the state of Montana, including recipients of MEDIA tax credits. The study also evaluated the impacts of film-based tourism.

## Cameron Miller

Associate Director; *Project Manager*



Cameron Miller is an associate director at ESI. He has a history of working across the public sector, having held positions in city government, higher education, and nonprofit organizations.

### Current Position

**Associate Director**, Econsult Solutions, Inc. 2023-Present  
Philadelphia, PA

### Past Positions

**Director of Operations**, City of Philadelphia Rebuild Initiative 2022-2023  
Philadelphia, PA

**Operations Manager**, City of Philadelphia Rebuild Initiative 2019-2022  
Philadelphia, PA

**Associate Director**, University of Pennsylvania Fels Institute of Government 2018-2019  
Philadelphia, PA

**Assistant Director**, University of Pennsylvania Fels Institute of Government 2017-2018  
Philadelphia, PA

**Program Coordinator**, University of Pennsylvania Fels Institute of Government 2015-2017  
Philadelphia, PA

**Graduate Assistant**, Rowan University College of Education, Office of the Dean 2014-2015  
Glassboro, NJ

### Select Project Experience

**Development of Rebuild’s Program Evaluation Plan:** Completed in 2023 for the City of Philadelphia. Cameron oversaw the development of an evaluation plan for the Rebuild Initiative, building upon a Theory of Change mapping the intended impacts of the program from perspectives of economic development, civic trust, and more. This plan ensures that the Rebuild program can gather data throughout its implementation that can be used to improve program delivery, communicate program impacts, and provide lessons learned for future investments.

### Areas of Expertise

Non-profit Management

Government Administration

Higher education

### Education

Graduate Certificate in Nonprofit Administration,  
University of Pennsylvania  
2018

M.A., School Psychology  
Rowan University  
2014

B.A., Psychology, Interpersonal Communication  
University of Delaware  
2012

**Emily Goldstein, M.C.P.**  
Senior Analyst; *Project Analyst*



Emily Goldstein is a senior analyst at ESI where she works primarily in the economic development practice. Ms. Goldstein brings a background in planning and research. She graduated from the University of Pennsylvania with a Master of City Planning in 2023. During her graduate studies, she worked as a research consultant for ESI Senior Advisor, Sylvie Gallier Howard of Equitable Cities Consulting, in addition to working at the Federal Reserve Bank of Philadelphia where she co-authored a paper on "small dollar" (under \$100K) mortgage lending in the region. Prior to her master's studies, Ms. Goldstein lived in New York City and worked in capital infrastructure planning and commercial corridor redevelopment for a business improvement district in Lower Manhattan.

**Areas of Expertise**

- Commercial Corridor Revitalization
- Economic Development
- Geospatial Analytics
- Urban Planning

**Education**

- M.C.P.,  
University of Pennsylvania  
2023
- B.A., Geography,  
University of North Carolina at  
Chapel Hill  
2018

**Affiliations**

- American Planning Association  
(APA)
- Urban Land Institute (ULI)

A born and raised Carolina Tar Heel, she received her undergraduate degree from the University of North Carolina (UNC) at Chapel Hill where she studied geography, public policy, and urban planning.

**Current Position**

**Senior Analyst**, Econsult Solutions, Inc. 2023-Present  
Philadelphia, PA

**Past Positions**

**Research Consultant**, Equitable Cities Consulting 2022-2023  
Philadelphia, PA

**Graduate Teaching Assistant**, University of Pennsylvania 2022  
Philadelphia, PA

**Graduate Research Intern**, Federal Reserve Bank of 2022  
Philadelphia, Philadelphia, PA

**Consultant**, Hudson Square Business Improvement District, 2021-2022  
New York, NY

**Planning Associate**, Hudson Square Business Improvement 2018-2021  
District, New York, NY

**Policy, Planning, and Research Fellow**, Times Square 2018  
Alliance, New York, NY

**Select Project Experience**

**Housing and Financial Capabilities: Integrating and Enhancing Services for Residents**: Paper evaluating the integration of financial capability services into housing programs in JPMorgan Chase Target Communities. The paper highlights effective practices, shared challenges, and key considerations for organizations aiming to enhance residents' financial stability, ultimately informing the development of an Opportunity Assessment on emerging practices in affordable housing and financial capability.

## Joseph Shortell

Senior Analyst; *Project Analyst*



Joseph is a senior analyst at ESI. He brings to the position six years of academic research experience in the U.S., China, and Spain and a passion for solving economic and social problems via empirically supported strategies.

Mr. Shortell received a Bachelor of Arts in theoretical economics from Trinity University in 2020, and a Master of Science in applied economics from the University of Barcelona in 2022.

### Current Position

**Senior Analyst**, Econsult Solutions, Inc. 2024-Present  
Philadelphia, PA

### Past Positions

**Analyst**, Econsult Solutions, Inc. 2022-2023  
Philadelphia, PA

**Kurtti Fellow for the Ecology and Conservation of China**, 2018  
United International College, Zhuhai, China

### Select Project Experience

**2022 Disparity Study for the City of Philadelphia:** Completed in 2023. Utilized procurement data from the City of Philadelphia to measure the disparity between the amount of city contracts awarded to minority and woman owned businesses and the availability of those businesses in the Philadelphia metro area.

**2023 State of North Broad Report:** Completed in 2022. Collected information and wrote descriptions about new property developments along North Broad Street. This was part of a larger report put together for North Broad Renaissance, a community organization seeking to revitalize the neighborhoods along North Broad Street.

**The Effect of a Minimum Lot Size Reduction on Residential Property Values: The Case of Houston:** Completed in 2022. Collected data on the appraised value, physical characteristics, and GIS coordinates for every one of Houston's 738,000 single-family residential properties. Estimated a difference-in-differences model to determine that Houston's 2013 pro-density land-use reform had the effect of increasing single-family residential land values.

### Areas of Expertise

STATA

QGIS

MATLAB

ArcGIS Pro

R

GEODA

Spanish

Mandarin Chinese

### Education

M.Sc, Applied Economics  
University of Barcelona  
2022

B.A. Theoretical Economics  
Trinity University  
2020

## Lechuan Huang

Analyst; *Project Analyst*



Lechuan Huang is an analyst at ESI. He received his Bachelor of Arts in Public and Urban Affairs from Virginia Tech, and his Master of Urban Spatial Analytics from the University of Pennsylvania. Prior to working as a full-time analyst, Lechuan was a geospatial research assistant at ESI. Mr. Huang brings experience in research and quantitative and spatial analysis.

### Current Position

**Analyst**, Econsult Solutions, Inc. 2023-Present  
Philadelphia, PA

### Areas of Expertise

R

SQL

ArcGIS

QGIS

Python

Tableau

JavaScript

### Education

Master of Urban Spatial Analytics  
University of Pennsylvania  
2022

B.A. in Public and Urban Affairs  
Virginia Tech  
2021

### Past Positions

**Geospatial Research Assistant**, Econsult Solutions, Inc. 2022-2023  
Philadelphia, PA

**Research Assistant**, PennPraxis/Penn Housing Initiative. 2021-2022  
Philadelphia, PA

**Undergraduate Researcher**, Virginia Tech College of  
Architecture and Urban Studies, Blacksburg, VA 2020-2022

### Select Project Experience

**Freddie Mac Land Use Index:** Ongoing. Supporting a joint project with the Penn Institute for Urban Research (PennIUR) under Wharton to construct a national dataset of local land use/zoning models for the Federal Home Loan Mortgage Corporation (Freddie Mac).

**SEPTA Future Impact:** Ongoing. As part of the greater project visioning the future operation quality of SEPTA, study the factors impacting the real estate property value in Greater Philadelphia, especially factors related to SEPTA's infrastructure and services quality.

### 2.3. Select Client List

The following list represents select clients ESI has served over the years whose needs have focused on economic and social impact within public policy, economic development, and tourism.

AARP	iMega	Philadelphia Industrial Development Corporation
American Communities Trust	Kansas City Chiefs	Project HOME
Avenue of the Arts	King of Prussia Business Improvement District	Riverfront Development Corporation of Delaware
Baltimore Development Corporation	Mid-Ohio Regional Planning Commission	Schuylkill River Development Corporation
Center City District	Montgomery County, MD Department of Transportation	South Jersey Economic Development District
City of Atlantic City, NJ	New Brunswick Development Corporation	St. Louis Economic Development Partnership
City of Chester, PA	New Hampshire Department of Employment Security	State of Montana Commerce Department
City of Cleveland, OH	New Jersey Housing Mortgage Finance Agency	State of New Hampshire
City of Newark, NJ	New York City Economic Development Corporation	Sustainable Business Network of Greater Philadelphia
City of New Haven, CT	New York City Department of Finance	Team Pennsylvania Foundation
City of Philadelphia, PA	North Broad Renaissance	United Way of Greater Philadelphia and Southern New Jersey
City of Wilmington, DE	Ocean City, NJ	Vetri Community Partnership
Delaware Valley Regional Planning Commission	Old City District	Visit Bucks County, PA
DowntownDC Business Improvement District	Pennsylvania Department of Community and Economic Development	Walnut Capital Management
East Central Wisconsin Regional Planning Commission	Pennsylvania Department of Transportation	Wexford Science & Technology
Federal Reserve Bank of Philadelphia	Pennsylvania Treasury	Williamsburg, VA
Freddie Mac	Pew Charitable Trusts	Woodmere Art Museum
Georgetown University Center for Retirement Initiatives		
Goldenberg Group		
Housing Alliance of Pennsylvania		
Houston First Corporation		

## 2.4. Relevant Project Experience

The project descriptions included with this submission briefly highlight the ESI's expertise and capabilities as they relate to this project. Additional information can be made available upon request.

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### City of Williamsport Revitalization Plan City of Williamsport, PA | 2020

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Analytical Capabilities  
Financial Feasibility Analysis  
Comprehensive Planning  
Economic Development Strategies

ESI was engaged by the City of Williamsport, PA to develop a financial recovery plan. Williamsport is the economic, commercial, and cultural hub of Central Pennsylvania. The city is the county seat of Lycoming County and is in north-central Pennsylvania, 70 miles west of Scranton and 131 miles northwest of Philadelphia.

The city's population has been declining for the past 50 years, maintaining an average of 4 percent decrease every decade since the 1990s. A smaller tax base than in previous decades has led Williamsport to run narrow surpluses or deficits over the past five years. The largest recorded deficit during this period was in 2018 at \$1.4 million, driven by both a sharp increase in expenditures and a hit to revenues.

To close the gap between revenues and expenses, the City determined that it needed to participate in the Commonwealth's Strategic Management Planning Program (STMP). The program's goal is to set short- and long-term financial and management objectives that improve local governments' fiscal capacity while also integrating long-term community and economic development plans that boost the tax base.

ESI's analysis depicts Williamsport's financial position, considering both past performance and future projections. In addition to evaluating finances, ESI conducted a full management audit of key departments such as Police, Fire, Codes, Community and Economic Development, Finance, Human Resources, Recreation, and Public Works. Our evaluation team used this information to develop recommendations that improve Williamsport's financial condition, as well as revised financial forecasts to include cost savings or revenue increases that could be realized if strategic recommendations were implemented.

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## Strategic Management Planning Program Five-Year Financial Plan Newtown, PA | 2021

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### Analytical Capabilities

Financial Modeling and Analysis  
Economic Development Analysis  
Strategic Planning and Facilitation

ESI was selected to assess Newtown Township’s financial condition and develop a five-year plan in conjunction with McNees Wallace & Nurick LLC and SRW Strategies. A five-year plan including recommendations to improve operational efficiency and promote fiscal stability in Newtown Township was developed in collaboration with the Township staff and Board of Supervisors. It is important to note that this analysis was commissioned prior to the COVID-19 pandemic, which has significantly impacted the Township’s finances and operations. Historically, revenue has failed to increase more than expenditure in Newtown. The practice of funding deficits with reserves is unsustainable as the General Fund reserve has continued to deplete.

The five-year financial report includes how Newtown Township could increase its revenue and decrease its operating expenses. Furthermore, it proposed potential multi-municipal collaboration opportunities and economic development strategies for consideration.

The baseline projections established the framework used to develop the recommendations, which are designed to build a stronger financial position and promote structural budgetary balance.

ESI found a range of measures and recommendations that could be taken to improve Newtown Township’s fiscal position under the STMP program. The Township was given these recommendations to implement with variations to the magnitude, timing, and combination of recommendations that are adopted.

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## A Delaware Canal for the 21<sup>st</sup> Century

### Delaware Canal 21, Bucks County and Northampton County, PA | 2022

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**Analytical Capabilities**  
Benefit-Cost Analysis  
Economic Impact Analysis  
Predictive and Scenario Analysis

The Delaware Canal, a historically significant, defunct industrial canal system, ties together multiple jurisdictions having shared challenges with the 190-year-old, dilapidated infrastructure. Following three consecutive years of devastating flooding of the adjacent Delaware River, critical obstacles to repairing flood damage came into sharp relief—as did an opportunity to develop a resilient stormwater management infrastructure improvement, making use of the canal.

Delaware Canal 21, a regional non-profit organization with a mission to ensure an enduring solution to address flooding along the corridor and related challenges, turned to a team of consultants lead by Econsult Solutions to evaluate the possible options for establishing a new, multi-jurisdictional entity tasked with advancing plans to restructure the canal infrastructure, enabling it to provide sustainable flood attenuation while enhancing a community asset that also benefits regional economic development. To build the case for public support, ESI conducted a series of analyses that illustrate the shared economic, environmental, and public safety benefits generated from the investment in this infrastructure improvement. The economic impacts of capital costs and maintenance were evaluated to demonstrate how those activities will generate local economic activity as well. The comparative analysis of management mechanisms presented in ESI’s report provided the client with a tool for determining the most feasible path forward.

The findings of this project are presented in a graphically rich format of the full study and the executive summary. Both formats are essential for public outreach and stakeholder engagement, paramount for gaining consensus in a multi-jurisdictional region.

[https://econsultsolutions.com/case\\_studies/a-delaware-canal-for-the-21st-century/](https://econsultsolutions.com/case_studies/a-delaware-canal-for-the-21st-century/)

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## Financial Projections in the Age of COVID: Bucks County Consortium

### Bucks County Consortium, Bucks County, PA | 2020

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#### Analytical Capabilities

Economic Development Analysis

ESI was retained by the Bucks County Consortium, a forum for intergovernmental cooperation and communication among many of the 52 incorporated municipalities in the County, to provide a county-wide analysis of actual and projected changes in major revenue sources impacting Consortium members through the end of 2021. The analysis took into consideration the economic and fiscal impacts of the COVID-19 crisis, including business closures, shifts in tax deadlines, economic slowdown and unemployment. ESI calculated the county wide impacts on four common revenue sources for municipalities – earned income tax, property tax, realty transfer tax and mercantile tax. ESI also identified risk factors that would impact individual municipalities for the EIT and property tax. The analysis will be used by the members of the Consortium in preparing revised current and future budget estimates.

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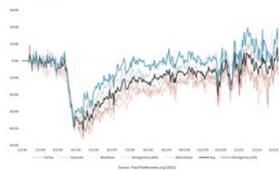
## Moving Montgomery County Forward: Developing a Strategy for Post-Covid Economic Recovery

### Montgomery County, PA | 2021

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Change in Daily Consumer Spend from January 2020 Levels



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Analytical Capabilities  
Economic Analysis  
Strategic Planning

At the start of the pandemic, Montgomery County, PA deployed and operated several economic development programs to help stabilize and provide relief to local businesses and residents amidst the public health and economic crisis.

ESI utilized public and private datasets to assess the pre-COVID and current economic conditions of the County. The analysis served as an important baseline to determine future recovery strategies.

Additionally, ESI utilized the analysis of economic activity, grant recipient data and interviews with business leaders to produce a SWOT analysis, principles of recovery for funding and recommended key investment initiatives.

Looking forward, ESI provided a strategy framework to optimize the County's recovery efforts, combining additional support from the American Rescue Plan Act investment with leveraging other federal, state, and private funding.

ESI assisted Montgomery County in this strategic objective by:

- Reviewed The State of the County Economy, which included understanding who has received recovery funds to date, how they have been used, and how the Covid-19 pandemic has impacted the county economy.
- Reviewed Montgomery County's economic development plans and strategies, by connecting its previous and current plans for growth opportunities during the recovery.
- Identified benchmark comparisons that examined the patterns and activities of five comparable counties.
- Recommended next steps to target future programmatic spending to optimize its impact.

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## Borough of Colwyn Revitalization

### Pennsylvania Department of Community and Economic Development, Colwyn, PA | 2018

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Analytical Capabilities  
Comprehensive Planning  
Financial Development  
Strategies

ESI, along with Fairmount Capital Advisors, and McNees Wallace Nurick, was appointed by the Pennsylvania Department of Community and Economic Development (DCED) as coordinator for developing and implementing a recovery plan for the Borough of Colwyn, PA. The recovery plan involved a multi-year financial forecast using 2015 as the base year and projecting yearly up to 2019.

The Borough of Colwyn was declared a financially distressed municipality on May 6, 2015 in accordance with Municipalities Financial Recovery Act (commonly referred to as "Act 47"). A key challenge to developing financial initiatives was the poor historical financial data recording. The coordinator constructed 2014 financial data from bank records obtained from the Borough's bank, tax records from the Borough's tax collector, and other sources.

In addition to the financial forecast, ESI also developed strategic recommendations for improving the Borough's operational functions, organizational structure, financial administration and management, debt situation, municipal service levels, intergovernmental cooperation and overall economic base.

Of the Borough's budget, public safety is the most significant expense. To rectify the lack of proper financial management, the report recommended that a comprehensive manual of policies and procedures for financial functions must be developed. ESI found that the Borough's current real estate taxes are weak and lag other municipalities in the Commonwealth. Given that almost 70 percent of the Borough's revenues are derived from current real estate tax collections, the report recommended that the Borough improves its tax collection efforts which would help increase revenue.

The Borough adopted the recovery plan on November 30<sup>th</sup>, 2015, allowing the implementation phase to start.

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## Philadelphia's Fiscal Future Research

### The Pew Charitable Trusts, Philadelphia, PA | 2022

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Analytical Capabilities  
Economic Analysis  
Fiscal Impact Analysis  
Policy Research

ESI was retained by The Pew Charitable Trusts to provide research and analysis in support of a series of Pew publications on scenarios for Philadelphia's economic and fiscal future post-COVID. ESI worked collaboratively with the Pew team to shape the key research questions, identify data sources and collect information, develop economic scenarios of alternative futures for the city, and analyze the economic, fiscal and equity implications of these scenarios. The project resulted in a series of four briefs published by Pew:

For the series' first brief, ESI supported Pew with research on how the pandemic impacted the city's economy relative to national trends, and disparities in recovery trends across demographic groups, income levels, and sectors.

See: [How the Pandemic Has Affected Philadelphia's Economy and Jobs: First findings of a series based on new research show the city is experiencing lingering job losses, with Black and female workers hit hardest](#)

For the second brief, ESI worked with Pew to develop four potential scenarios for Philadelphia's economic performance over the next several years and estimated the gap in city employment in total and by sector between these illustrative futures.

See: [4 Possible Scenarios for Philadelphia's Economic Future: In-person activity and business investment could be keys to job growth](#)

For the third brief, ESI supported Pew with analysis of the trajectory of city revenues, and who pays for them, would change under each of the four economic scenarios developed.

See: [How Future Employment Patterns Could put Philadelphia's Operating Budget at Risk: Four scenarios that will affect tax revenues – and who pays for them.](#)

For the fourth brief, ESI supported Pew with research into where the city stands two years into the pandemic, and the implications of key recovery trends evident in the data to date.

See: [5 Key Economic Trends and the Critical Questions They Raise for Philadelphia: Employment, remote work, and housing will play a decisive role in the city's prospects for an equitable pandemic recovery.](#)

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## Tobyhanna Township Increment Financing and Public Improvement Levy Tobyhanna Township Economic Development Authority and the Monroe County Industrial Development Authority, Tobyhanna Township, PA | 2018

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Analytical Capabilities  
Public Finance  
Feasibility Analysis

In 2018, ESI was retained by Tobyhanna Township, The Tobyhanna Township Economic Development Authority and the Monroe County Industrial Development Authority to evaluate the borrowing potential through Tax Increment Financing (TIF) and Pennsylvania's 1<sup>st</sup> Public Improvement Levy (PIL) as public finance mechanisms for Pocono Springs Entertainment Village, a 3 Phase 1.4 Million Sq. Ft. experiential destination entertainment and retail complex in Monroe County, Pennsylvania.

ESI reviewed plans and projections provided by the developers in order to validate their reasonableness and assess project feasibility.

Next, ESI evaluated the annual funding streams that could be raised through two mechanisms.

The first is Tax Increment Financing, which would utilize the additional real estate tax revenues generated by the increase in assessed value associated with the project.

The second is a Public Improvement Levy, which would generate revenues through a levy of 1% of sales within the complex. This unique mechanism was designed by the Tobyhanna Township Economic Development Authority to provide both initial funding for public infrastructure as well as a continual non taxpayer fiscal support for operation and maintenance of this infrastructure by levying the users of such infrastructure.

Working in partnership with Tobyhanna Township, Authority officials and project developers, ESI then developed a financing model to translate these annual revenue streams into commensurate bonds proceeds they would support to help finance project development.

The following individuals can attest to ESI's commitment to providing high-quality client services, attention to detail, and superior project deliverables.

<b>Reference</b>	<b>Project</b>
<b>Derek Slaughter</b> Mayor City of Williamsport Address #1 Address #2 570-327-7566 <a href="mailto:dslaughter@cityofwilliamsport.org">dslaughter@cityofwilliamsport.org</a>	<b>Financial Recovery Services, City of Williamsport</b>
<b>Doug Dolan</b> Executive Director Delaware Canal 21 P.O. Box 262 Point Pleasant, PA 18950 215-805-0863 <a href="mailto:ddolan@delawarecanal21.org">ddolan@delawarecanal21.org</a>	<b>A Delaware Canal for the 21<sup>st</sup> Century</b>
<b>Elinor Haider</b> Director, Philadelphia research and Policy Initiative Organization Pew Charitable Trusts 2005 Market Street, #2800 Philadelphia, PA 19103 <a href="mailto:ehaider@pewtrusts.org">ehaider@pewtrusts.org</a>	<b>Philadelphia's Fiscal Future</b>

## 3. Methodology

### 3.1. Project Understanding

The City of Allentown has experienced an increase in population in recent years and with it, increased demands for high quality service delivery for its residents and businesses. The city is seeking an analysis of potential revenue generation options to enable it to meet service delivery needs. Due to restrictions on taxation under the home rule charter, this analysis will be focused on alternative revenue mechanisms such as fees or user charges on various activity types. Additional revenue sources should be thoughtfully designed and implemented to minimize negative impacts on citizens and on the city's competitiveness for residents and business attraction.

Allentown's population grew by around 7,000 residents in the 2010-2020 Census period, and it is currently the third largest city in the Commonwealth of Pennsylvania, with more than 125,000 residents. The urban core has seen significant investment in recent decades with the opening of a sports and entertainment arena and new hospitality, corporate, and medical centers. With PPL Area and Coca-Cola Park, the city has large scale venues that play host to sports and entertainment events. Despite this investment, Allentown still faces challenges, with a median income below the state average and an elevated rate of households in poverty.

As its population grows, additional revenues are required to keep up with rising public service needs and increase service quality. This challenge is not unique to Allentown but is shared by many legacy cities, which tend to see slow growth in their tax bases and face financial challenges from aging infrastructure. Tax revenues for the City are generated primarily through the Real Estate Tax, Earnings Tax, and Business Privilege tax, which together account for about 90 percent of General Fund tax revenues. Increasing the rates of any of these taxes has the potential to adversely affect economic development and resident attraction from the city. In addition, Allentown is constrained by the home rule charter from establishing any new tax.

As a result, Allentown is seeking an analysis to explore alternative sources of revenue generation to support service delivery. A review of market conditions and best practices from peer municipalities and beyond will surface a range of options that have been utilized in other jurisdictions to generate municipal revenues. These options will be assessed in terms of their revenue potential, evaluated in terms of their potential impacts on residents and economic activity, and for the feasibility of implementation. This process will yield a vetted list of potential options to increase municipal revenues in ways that minimize negative impacts of the city and its residents.

### 3.2. Project Approach

ESI will take a four-part approach to the meet the scope of work outlined in the scope of work:

- Task 1: Best Practices and Market Research
- Task 2: Revenue Gap Analysis and Engagement
- Task 3: Recommendations and Implementation Plan
- Task 4: Reporting and Presentation of Findings

## Task 1: Best Practices Research

Best practices and market research will be conducted to identify potential revenue generation opportunities beyond existing or typical taxes.

One track of this research will be conducted by identifying and researching the revenue approaches for similarly situated jurisdictions. Potential peer jurisdictions will be identified by the ESI team and narrowed down to a comparative set through discussions with the City. Similarly situated jurisdictions will be identified by criteria such as their size and economic and demographic trajectory. It will be essential to understand the jurisdictional status of these peer municipalities within their counties and states, and the implications of that status on their options for revenue generation and service delivery. Peer research will be conducted through a review of budget documents, as well as reports, presentations, and news articles that detail the revenue approaches. Where promising models are identified, outreach to these jurisdictions may be helpful to better understand how they are implemented or administered.

ESI will also review national best practices and industry research regarding revenue generation. Organizations such as the Government Finance Officers Association (GFOA) and National League of Cities (NLC) regularly collect and publish information on promising practices and case studies. This research is supplemented by other sources such as foundations focused on good governance, and academic programs focused on public administration and public policy. ESI is familiar with these sources and alternative revenue approaches utilizing fees and charges for usage and activity. This national scan will identify promising approaches, and vet them for their potential applicability in Allentown.

## Task 2: Revenue Gap Analysis

The external scan in Task 1 will be paired with research on conditions in Allentown to develop a revenue gap analysis.

A baseline understanding will be developed of current revenue streams and their trajectory, economic conditions and activity centers, service delivery concerns, and any models that have been considered or implemented in the past. ESI's team will review budget documents and economic information to develop a baseline understanding of the city's revenue mix. In addition to the levels and proportions of current revenue sources, the team will seek to develop an understanding of the trajectory and volatility of those sources. This will include consideration of the city's economic and demographic trends, and their implications for future revenue and expenditure needs. Economic analysis will also seek to identify the current level for activity types that could be considered as potential revenue sources such as entertainment activity, development activity, vehicle ownership, use and parking, etc.

This research will be supplemented by discussions with experts from the city. Through these conversations, the consulting team will seek context on the city's revenue approach and constraints, understand alternative revenue models that have been evaluated or implemented in the past, understand potential obstacles (legal, logistical or political) to implementing new revenue sources, and better understand the service delivery challenges faced by the city.

The findings from the external-facing analysis (in Task 1) will be combined with this internal baseline to develop a revenue gap analysis. This component will assess the potential revenue options identified

through the best practices research considering the city's economic conditions and current revenue mix. Through this gap analysis, a set of potential alternative revenue approaches will be identified. For each alternative that is considered viable, the annual revenue-generation potential will be identified, and any significant obstacles will be identified.

### Task 3: Recommendations for Implementation

The revenue options surfaced by the gap analysis will be further considered, refined, vetted by the consulting team to present recommendations for implementation.

Any fee imposed by the government has the potential to limit economic activity or impose challenges for the parties that are subject to it. Several well-developed economic and policy frameworks can be utilized to evaluate the potential impacts and trade-offs inherent in revenue raising policies. These include considering the distributional burden (and its equity implications), the potential disincentive effects (discouraging economic activity), the stability and adequacy, and any challenges in administration, implementation and collections. ESI will develop an analysis of these considerations, which will be paired with the revenue estimates for each option. Through analysis of these trade-offs and discussion with the City, the ESI team will advance recommendations for implementation.

As required, ESI will conduct stakeholder meetings or citizen outreach to help the city determine the reactions of impacted citizens and businesses to options under consideration. This outreach may in some cases be technical in nature, helping to define how a certain fee or assessment could best be administered. Alternatively, outreach or surveying may be used to determine the receptivity of citizens to certain revenue types.

Public outreach is treated as an optional service within this proposal and the associated price proposal. Survey design and analysis and stakeholder facilitation are competencies for ESI. If services related to advocacy or more sophisticated public outreach are required, ESI would call upon members of our Senior Advisory board or work with a sub-contractor specializing in the appropriate services.

### Task 4: Reporting and Presentation of Findings

Research, analysis and recommendations will be compiled into a detailed report. The report is envisioned to be produced in a 'reader-friendly' format and will include information design techniques to help clearly communicate key findings (such as graphics, charts, and call-out boxes). Appendices will be utilized as necessary for additional documentation of information or methods. The report will be delivered in draft format and revised in a timely manner responsive to feedback from the project team.

The findings will also be summarized into a presentation which will be delivered by the consulting team to the city. The report and presentation will clearly delineate the key research findings, the findings from the revenue gap analysis, estimated revenue amounts by source and key considerations for the concepts analyzed, and recommendations for implementation.

# Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Econsult Solutions, Inc.**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_  
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
Exempt payee code (if any) \_\_\_\_\_  
Exemption from FATCA reporting code (if any) \_\_\_\_\_  
*(Applies to accounts maintained outside the U.S.)*

5 Address (number, street, and apt. or suite no.) See instructions.  
**1435 Walnut Street, 4th Flr.**

6 City, state, and ZIP code  
**Philadelphia, PA 19102**

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type. See Specific Instructions on page 3.

## 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.

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

Social security number

				-					
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or

Employer identification number

4	6	-	1	5	4	2	5	6	5
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## Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- 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 ▶ *Wendy M. Samuel* Date ▶ 1/20/2021

## 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](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



### Vendor Diversity Business Classification Form

City of Allentown requires vendors to update this information annually or any time your company's classification changes. Send completed and signed form to purchasing.agent@allentownpa.gov.

Company Legal Name:		Primary Contact Name:	
Address:		Remit to Address (if different):	
City, State, Zip:		City, State, Zip:	
Phone #:		Phone #:	
Fax #:		Fax #:	
E-Mail Address:		Website:	

#### Business Classification Representation:

##### Ownership Status

The undersigned represents that we are (select **ALL that apply** and include a copy of your certification if applicable):

- Small Business
- Women Business Enterprise
- Veteran Business Enterprise
- Other: \_\_\_\_\_
- Minority Business Enterprise
- Service Disabled Veteran-Owned
- Historically Underutilized Business Zone

The undersigned certifies the information provided above is true and accurate to the best of his/her knowledge.

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: *Arthur C. D.* Date: \_\_\_\_\_

**Proposals must be accompanied by the Signature Page. Failure to sign and submit the Signature Page with the bid will result in the bid being rejected as non-responsive.**

To: The City of Allentown, Pennsylvania

The Undersigned, having examined the Specifications, Standard Requirements and all other documents and being familiar with the various conditions under which these services and/or supplies are to be used, agrees to all terms and conditions set forth in the bid and to furnish all labor, material, tools, equipment and services to furnish the requirements called for in the bid, for the prices stated.

The Undersigned hereby certifies that this response is genuine and not fraudulent or made in the interest of or on behalf of any person, firm, or corporation, not herein named, and that the undersigned has not, directly or indirectly, induced or solicited any Bidder to submit a false or fraudulent bid or prohibited any other person, firm or corporation from bidding and that the undersigned has not, in any manner, sought by collusion to secure for himself any advantage over any Bidder.

A signed Bid/quote submitted to the City obligates the bidder to all terms and conditions stated within the bid/quote document.

Company Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_ FAX No. \_\_\_\_\_

**TRADING AND DOING BUSINESS AS (Check One)**

Individual

Partnership

Corporation

Federal I.D.# \_\_\_\_\_ or Social Security # \_\_\_\_\_



(Seal)

Addendum #1 \_\_\_\_\_ (date)

Addendum #2 \_\_\_\_\_ (date)

Addendum #3 \_\_\_\_\_ (date)



Pursuant to the City's Administrative Code Section 130.16 (H), for all non-competitive RFP contracts or financial assistance in excess of \$2,500, an individual or business (including: family members with a financial interest in the business, business associates, subcontractors, contribution to a PAC which makes a candidate contribution, consultants) shall not make a contribution in excess of \$250.00 inclusive of in-kind services in the aggregate, to a candidate for any elective City office or to an elected City office incumbent during the incumbent's term of office.

**VENDOR INFORMATION**

Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**CONTRIBUTION DISCLOSURE**

Contributor Name	Recipient Name	Date	Dollar Amount
			\$
			\$
			\$

Check here if the information is continued on subsequent page (s).

**SUB-CONTRACTOR/CONSULTANT IDENTIFICATION**

Name	Employer	Address

Check here if the information is continued on subsequent page(s).

I certify that NO contributions in the aggregate total over Two Hundred Fifty (\$250.00) Dollars were made to an applicable public official by me, a family member or representative. I understand that this certification applies for the length of this contract, and that breach of such contribution rules shall be cause for the void of this contract. I further understand that I will be liable for liquidated damages of 10% of the maximum payment made to me should this contract be voided due to my breach of such contribution rules.

Read and accepted by:

Signature

Printed Name and Title/Position

Date: \_\_\_\_\_

Article 815B of the Home Rule Charter of the City of Allentown requires that bids received from an Identified Business Enterprise, i.e. Small Business, Small diverse Business, and Veteran Business, will receive 10 points towards their final score. In order to qualify for the preference, the IBE must be properly licensed to do business in the City of Allentown and in compliance with all City Ordinances and regulations.

**BIDDERS SHALL COMPLETE THE FOLLOWING:**

\_\_\_\_\_ We qualify for the IBE Preference because:

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\_\_\_\_\_ We do not qualify for the IBE Preference.

**FAILURE TO RESPOND AFFIRMATIVELY TO THE ABOVE WILL IN NO WAY HAVE A NEGATIVE IMPACT ON YOUR BID.**

FIRM NAME: \_\_\_\_\_

BY:  \_\_\_\_\_

PRINTED: \_\_\_\_\_

TITLE: \_\_\_\_\_

CITY OF DEPARTMENT OF COMMUNITY & ECONOMIC DEV.  
 MWBE-9-08 - (9-08)

(PLEASE PRINT)

**MINORITY & WOMEN'S BUSINESS ENTERPRISE  
 PRIME CONTRACTOR'S QUARTERLY UTILIZATION REPORT**

(This form should be returned within 10 working days at the end of each quarter.)

<b>PRIME CONTRACTOR'S FIRM NAME</b>	<b>REPORTING PERIOD</b>
<b>ADDRESS</b>	<b>CONTRACT NUMBER</b>
<b>TELEPHONE</b>	
<b>CONTACT PERSON</b>	<b>DATE RECEIVED (Office use Only)</b>

List State certified minority and/or women-owned businesses whose services and/or supplies you have purchased in reference to this contract.

COMPANY NAME	ADDRESS	TELEPHONE NUMBER	MBE (X)	WBE (X)	TRANSACTION		DATE PAID	MBE/WBE ACTUAL DOLLARS*
					SUB CONTRACT (X)	SUPPLIES (X)		

<b>Prepared By:</b>	<b>Title:</b>	<b>Phone No:</b>	<b>E-Mail Address:</b>
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# SUBMITTALS CHECKLIST

To help ensure that you include all the submittals necessary to complete a thorough evaluation of your bid proposal, we suggest that you use this checklist as a reminder to yourself, by placing a check in each box in the Verified column indicating that the items are completed and/or enclosed with your bid proposal packet.

VERIFIED	DESCRIPTION OF SUBMITTAL	REF PAGE NO.
	Signature Page	Page A
	Political Contribution Disclosure Form	Page B
	IBE Preference Form	Page C
	MBE/WBE Commitment Form	Page M1
	MBE/WBE Prime Contractor Form	Page D
	Remember to attach a copy of your most recent W-9 Form.	
	Remember to direct any/ all bid questions using the Public Purchase Website. Utilizing this site will guarantee questions are documented and answered quickly and promptly electronically or responded to in form of an addendum.	
	Remember to check Public Purchase for any Addenda that may have been issued regarding this bid.	
	Remember that when submitting your sealed bid to clearly label your submission with your company name, bid number and title.	
	Remember to check that there is <b>NO COST</b> in your technical proposal. The inclusion of cost proposal information in the technical proposal will cause the entire proposal to be disqualified.	

**ESI** ECONCONSULT  
SOLUTIONS INC.

**economics | strategy | insight**

1435 Walnut Street, 4<sup>th</sup> Floor, Philadelphia, PA 19102  
[econconsultsolutions.com](http://econconsultsolutions.com) | 215-717-2777