



## Exhibit B Economic Development Reporting Requirements

Area	Type	Report	Description	Frequency	To Whom
EOF	IGA ED Services	EOF Compliance	Report to the IA Board and make EOF Report available to the City for inspection	Annually	Invest Atlanta
EOF	IGA ED Services	EOF Draw Downs & Financial Reports	Provide a report of all the EOF draw downs and distribution	Quarterly	City CFO
EOF	IA Economic Impact	EOF Jobs Report	Report the number of jobs and investment produced by those projects receiving an EOF Grant (include jobs by zip codes)	Annually	City Clerk
ED	Economic Development Services	IA Economic Development Results	Provide a report on annual, comprehensive IA economic development activity results, including incentives, and agency organizational chart, including budget revenues and expenses	Yearly	Budget Hearing Presentation
ED	Economic Development Services	Proctor Creek Greenway	Provide a report on annual, economic development and redevelopment activity results,	Yearly	City Clerk
ED	Economic Development Services	Monthly Insight	Monthly electronic newsletter with current projects & new initiatives	Monthly	Councilmembers
ED	Economic Development Services	Report of IA Board Actions	Summary of Resolutions approved by IA Board	Monthly	Councilmembers
IA	IA Economic Impact	Jobs Impact	Report on the number and type of jobs that are facilitated by IA in the City	Monthly	Posted on the IA Website
IA	IA Economic Impact	Capital Investment Impact	Report on the amount of capital investment facilitated by IA in the City	Monthly	Posted on the IA Website
IA	IA Economic Impact	Project Detailed Report	Report to the City on all projects funded in that year (detail, council district, investment and jobs)	Annually	City Clerk
IA	IA Economic Impact	New Initiatives Report	Report to the City on new initiatives implemented by Invest Atlanta (i.e. Proctor Creek Greenway, Southside Manager, Opportunity Zones, EB5)	Annually	City Clerk
IA	IA Impact	Community Engagement	IA will report on its Community Engagement activities in the Quarterly TAD Activity Report or the IA Monthly Insight Webpage	Quarterly	Invest Atlanta
IA	Operating Report	Expenditure Report	Itemized list of G&A Expenses (including names of all entities)	Annually	CFO/FEC



## Exhibit B Economic Development Reporting Requirements

Area	Type	Report	Description	Frequency	To Whom
SBLF	Small Business Loan Funds	Cost Allocation - Brownfield Loan Fund	Cost recovery for labor for the Brownfield Loan Fund	Quarterly	Planning
SBLF	Small Business Loan Funds	Bank Statements	Account balances for the BILF Operating and Committed Accounts	Quarterly	Planning
SBLF	Small Business Loan Funds	Environmental Clearance Letter - BILF/PLF	Environmental clearance request	At Loan Approval	Grants Mgmt.
SBLF	Small Business Loan Funds	Section 106 Clearance Letter - BILF/PLF	Historic property clearance request	At Loan Approval	Planning
SBLF	Small Business Loan Funds	Job Creation Documentation - BILF and Phoenix	Number of jobs created per loan closed	At Loan Approval	Grants Mgmt.
SBLF	Small Business Loan Funds	Davis Bacon Wage Rate Documentation	Wage requirements for construction projects	At Loan Approval	Grants Mgmt.
WEI	Women's Entrepreneurship Initiative (WEI)	Cohort Report	This report will include entrepreneurial-readiness of each WEI participant: scalability of each business - dollar amount of revenue increase during WEI program; quantifiable impact of mentorship engagement sessions and dollar amount invested in each entrepreneur.	Annually	City Clerk
WEI	Women's Entrepreneurship Initiative (WEI)	WEI Economic Impact Report	Number of jobs/internships created and retained	Monthly	Posted on the IA Website



## Exhibit C Redevelopment Compliance and Reporting

Area	Report	Description	Frequency	TADS	To Whom
TADs	Completion status	Evaluation of completion status for all TADs	Every three years	ALL	FEC/CDHS
TADs	Financial updates	Financial updates for all TADs	Annually	ALL	FEC
TADs	TAD Activity Update/Project Status Report	Provide updates and details on current TAD activities, approved projects, & results, to include: project location, developer, property type, size, amount of TAD funding approved, total project cost, MFBE utilization if applicable, job creation if applicable, affordable housing if applicable, and year of completion; & community engagement activities	Quarterly	Active TADS	CDHS Q 1&3 FEC Q 2&4
TADs	Financial Statements	Includes fund balance sheet comparison showing assets and liabilities and flow of funds comparison which includes sources and uses of funds	Quarterly	ALL	City CFO & FEC
TADs	Audited Financial Statements	Audited financial statements of the governmental activities and the major fund of City TAD funds	Annually	TADS with debt	City CFO & FEC
TADs	Agreed Upon Procedures	Formal and independent third-party review of Invest Atlanta and Fulton County Tax Commissioner records to assist with meeting continuing disclosure requirements of outstanding bonds	Annually	TADS with debt	City CFO & City Clerk
TADs	Continuing Disclosure Report	Document is produced for the benefit of the bondholders and may include: fund balances, assessed values, appeals, ten largest taxpayers, debt service coverage, millage rates and tax increment collections	Annually	TADS with debt	City CFO & City Clerk
TADs	TAD Activity Report	Email newsletter (IA Insights) to include information on recent activity within the TADs, including: groundbreakings, project approvals, awards and bond issuances.	Quarterly	Active TADS	Councilmembers
TADs	TAD Housing Report	Summarizes sales and leasing activity for residential projects funded through TADs and includes: number of units planned, under construction, under contract, rented, closed and how many are affordable.	Annually	Active TADS	Chief Housing Officer & City Clerk
TADs	Budget	Presentation of projected fiscal year revenues and expenditures, showing a comparison of fiscal year projections with actual results for each TAD	Annually	ALL	City CFO & FEC
TADs	Annual Financial Reports	Invest Atlanta's annual financial reports	Annually	ALL	City CFO & FEC
TADs	Amendment to Existing Redevelopment Plan	To include at a minimum: establishment of the "but for" clause for the projects within the expanded scope; proposed specific uses of funds; anticipated benefits to be produced by the private sector entity receiving assistance; and description of sanctions, such as claw back provisions, for failure to meet goals	As appropriate	As needed	City Clerk
TADs	Redevelopment Agent	Monthly Insight - electronic newsletter with current TAD projects & new initiatives	Monthly	Active TADS	Councilmembers
TADs	Redevelopment Agent	Report of IA Board Actions - Summary of adopted IA Board Resolutions related to the City's TADs	Monthly	Active TADS	Councilmembers