



United States
Department of
Agriculture

Office of the General Counsel
1400 Independence Ave. SW
Washington, DC 20250-1400

May 24, 2021

Delivered via Electronic Mail

Austin R. Evers
American Oversight
1030 15th Street NW, Suite B255
Washington, District of Columbia 20005
Email: foia@americanoversight.org

Ricardo J. Salvador
Union of Concerned Scientists
1825 K Street NW, Suite 800
Washington, District of Columbia 20006

**Re: Supplemental Response to Freedom of Information Act (FOIA) Requests
2020-DA-02836-F, 2020-REE-03063-F, 2020-DA-02838-F, and 2020-DA-02842-F**

Dear Mr. Evers and Mr. Salvador:

This is the Office of Information Affairs (OIA), FOIA Division's **supplemental response** to the above referenced FOIA requests. This correspondence also responds to the matter of *American Oversight, et al. v. U.S. Department of Agriculture, et al.*, Civil Action No. 20-1259-EGS, currently pending in the U.S. District Court for the District of Columbia.

The pending Complaint in the above-referenced matter is based on USDA's alleged failure to comply with the applicable time-limit provisions of the FOIA in response to American Oversight (AO) and the Union of Concerned Scientist's (UCS) aforementioned requests.

The OIA has rereviewed the redactions made on the bates pages listed on the document entitled "+Litigation Follow Up Items for Agencies (Final)," sent by AO and the UCS and enclosed herein. Upon secondary review, the OIA has made some discretionary releases in each request.

Notwithstanding these discretionary releases, the OIA has determined that certain information should continue to be withheld pursuant to 5 U.S.C. § 552 (b)(5) and (b)(6) (FOIA Exemptions 5 and Exemption 6). Below are explanations of the information that the OIA is continuing to withhold.

Application of 5 U.S.C §552(b)(5) "FOIA Exemption 5"

FOIA Exemption 5 protects from disclosure those "inter-agency or intra-agency memorandums or letters which would not be available by law to a party other than an agency in litigation with the agency." 5 U.S.C. §552(b)(5). This language is construed to protect records that are normally privileged in the civil discovery context, including through the deliberative process privilege and the attorney-client privilege. As an initial matter, the information withheld meets the threshold requirement because it is contained in internal emails sent between federal

employees. Where possible, the OIA has determined to make discretionary releases of information that fall within the protection of Exemption 5.

In this instance, the OIA is continuing to withhold, under the deliberative process privilege, pre-decisional, inter- and intra-agency discussions on future agency decisions and actions with regard to the Economic Research Service (ERS) and National Institute of Food and Agriculture's (NIFA) relocation. By withholding this information, the OIA is protecting the integrity of the agency's decision-making process and ensuring no inhibition of free and frank exchange between agency personnel. The OIA is also ensuring against the premature disclosure of proposed policy, which could if released, cause confusion to the public regarding the agency's policy positions.

The OIA is also continuing to withhold information under the attorney-client privilege. This privilege protects confidential communication between an attorney and his/her client relating to a legal matter for which the client has sought professional advice. Although this privilege fundamentally applies to facts divulged by a client to his/her attorney, this privilege also encompasses any opinion given by an attorney to his/her client based upon those facts, as well as communications between attorneys that reflect client supplied information. In this instance, the FOIA Division is withholding information that would reveal substantive content of communications and documents between clients and their counsel.

Further, the OIA is continuing to withhold information under attorney work-product. This privilege protects materials prepared by an attorney or others in anticipation of litigation by shielding materials which would disclose the attorney's theory of the case or trial strategy. The privilege is available once specific claims have been identified that make litigation probable. The materials that have been withheld under the attorney work-product privilege were prepared by or for a Department attorney in reasonable anticipation of litigation and reflect the parties' pre-litigation thoughts, comments, and evaluation of matters related to the ERS and NIFA relocation. We conclude that the withheld materials are protected in full from disclosure by the attorney work-product privilege of Exemption 5.

Application of 5 U.S.C. §552(b)(6) "FOIA Exemption 6"

FOIA Exemption 6 permits the government to withhold information regarding individuals in "personnel, medical and similar files" when the disclosure of such information would constitute a clearly unwarranted invasion of personal privacy and where such privacy interests outweigh any public interest that would be advanced by disclosure. For purposes of the FOIA, the public interest is advanced when disclosure of the requested information educates the public about the activities of the government.

The OIA has released some of the previously withheld Exemption 6 redactions pertaining to former USDA officials and employees as there is no longer a privacy interest that needs to be protected. The information continuing to be withheld under Exemption 6 consists of unpublished business contact information, individuals' personal reflections, references to medical appointments, and personal information. This information qualifies as "similar files" because it is information in which individuals have a privacy interest. The release of unpublished business

contact information could subject individuals to unwarranted or unsolicited communications. Although the remaining information withheld would not likely result in unsolicited communications, the information is of a private nature and its release does not shed light on governmental operations. Because there are viable privacy interests that would be threatened by disclosure, Exemption 6 authorizes this office to withhold the information. Accordingly, the FOIA Division has determined that the public interest in the information's release does not outweigh the overriding privacy interests in keeping it confidential.

In light of the matter *American Oversight, et al. v. U.S. Department of Agriculture, et al.*, Civil Action No. 20-1259-EGS, currently pending in the U.S. District Court for the District of Columbia, administrative appeal rights are not being provided in this supplemental response letter.

If you have any questions or concerns about this supplemental response or the pending civil action, please contact John Truong, Assistant United States Attorney, U.S. Department of Justice at John.Truong@usdoj.gov.

Sincerely,



Alexis R. Graves
Director
Office of Information Affairs

Enclosures: +Litigation Follow Up Items for Agencies (Final)
2020-DA-02836-F DFO First Interim Response_August 20, 2020 (47 pages)
2020-DA-02838-F DFO Second Interim_July 27, 2020, Third Interim_January
29, 2021, and Final Response_February 28, 2021 (70 pages)
2020-DA-02842-F DFO First Interim Response_August 31, 2021 (49 pages)
2020-REE-03063-F REE Second Interim Response_September 25, 2020 (29
pages)

GSA Site Visit Documents

Agency Tracking Number: GSA-2020-000596

AO Tracking Number: GSA-20-0425

- **Withholdings:** Can the agency lift or justify the withholdings on the following pages?
 - o PDF Pgs. 6–7: Full contents.
- **Adequacy of the search:** Can the agency provide details on how the search process was conducted—for instance, whether search terms or other methods were used to identify responsive records—to determine whether a supplemental search may be needed? Please note that Plaintiffs are concerned that GSA’s response did not include several types of potentially responsive records, such as:
 - o Records sufficient to identify the names of GSA officials that participated in the site visits.
 - o Any notes taken during the site visits.
 - o Any summaries of the site visits.
 - o Any email/text communications relating to the site visits.

USDA Site Visit Documents

Agency Tracking Numbers: 2020-DA-02836-F; 2020-REE-03063-F

AO Tracking Number: USDA-20-0424

- **Withholdings:** Can the agency lift or justify the withholdings on the following pages?
 - o DFO First Interim Response (Aug. 20, 2020)
 - Bates Stamp Pgs. 18–22: “FOUO USDA Community and Site Visit Overview vFDraft.pptx” (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)
 - Bates Stamp Pg. 28: Content of Michelle Esch’s email.
 - Bates Stamp Pgs. 47–49: Any and all content describing questions received from EOI applicants.
 - Bates Stamp Pgs. 66–94: “FOUO USDA Site Visit Briefing Book Research Triangle, NC vF.pdf”
 - Bates Stamp Pgs. 126–28: Full content of email exchange.
 - Bates Stamp Pgs. 132–38: “FOUO USDA Site Visit Qualitative Scorecard DRAFT v2.xlsx (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)
 - o REE Second Interim Response (Sept. 25, 2020)
 - Bates Stamp Pgs. 608: “FOUO USDA Site Visit Objectives DRAFT v5.pptx” (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)
 - Bates Stamp Pgs. 645–48: Contents and subject lines of email exchange.
 - Bates Stamp Pgs. 654–57: Contents and subject lines of email exchange.
 - Bates Stamp Pgs. 689–91: Any and all content describing questions received from EOI applicants.

- Bates Stamp Pgs. 700–01: “ERS Site Selection Factors May 1 revised.docx” (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)
 - Bates Stamp Pgs. 730–34: Contents of email exchange.
 - Bates Stamp Pg. 766: Contents of “Press responses”
 - Bates Stamp Pg. 767: Contents of “Incentives Plan During Site Visit”
- **Adequacy of the Search:** Can the agency provide details on how the search process was conducted—for instance, whether search terms or other methods were used to identify responsive records—to determine whether a supplemental search may be needed? Please note that Plaintiffs are concerned that USDA’s response did not include several types of potentially responsive records, such as:
 - Copies of the “ERS/NIFA Civil Rights Documents” attached to the email on REE Bates Stamp Pg. 536. (Plaintiffs believe that these records would also be responsive to 2020-DA-02842-F; 2020-REE-03065-F.)
 - Any text communications relating to the site visits, even though the records indicate that participants had exchanged cell phone numbers in advance of travelling. *See, e.g.*, REE Bates Stamp Pg. 551.
 - “Takeaway materials” provided during or after the site visits by the EOI applicants. For example, REE Bates Stamp Pg. 585 refers to “takeaway materials” provided by the Economic Development Partnership of North Carolina.
 - Any notes taken by participants during site visits.

Relocation CBA Documents

Agency Tracking Numbers: 2020-DA-02838-F; 2020-REE-03064-F

AO Tracking Number: USDA-20-0426

- **Withholdings:** Can the agency lift or justify the withholdings on the following pages?
 - DFO’s Second Interim Response (July 27, 2020)
 - Throughout production, including any withheld in full records: To the extent the name of a geographic location is mentioned, including in shorthand, can the agency lift the redaction covering the location? (E.g., any references to Indianapolis, Indiana (including “Indy” or “IN”), North Carolina (including “NC” or “Research Triangle”), St. Louis, (including “STL”), Kansas City (including “KC”) or Missouri (including “MO”)); or Madison, Wisconsin (including “WI”).
 - Bates Stamp Pg. 1: Contents of email message.
 - Bates Stamp Pgs. 4–5: Contents of email exchange.
 - Bates Stamp Pgs. 8–9: Contents of email exchange.
 - Bates Stamp Pg. 12: Contents of email message.
 - Bates Stamp Pg. 20: Contents of email message.
 - Bates Stamp Pg. 30–31: Contents of email exchange.
 - Bates Stamp Pg. 35–36: Contents of email exchange.
 - Bates Stamp Pg. 40: Contents of email message.
 - Bates Stamp Pg. 44: Contents of email message.

- Bates Stamp Pg. 58–59: Contents of email exchange.
- Bates Stamp Pg. 63: Contents of email exchange.
- Bates Stamp Pg. 68: Contents of email message
- Bates Stamp Pgs. 69–71: Contents of “Informational Memorandum” (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request. Plaintiffs understand that a final version of this memorandum was circulated among employees as justification for the decision to realign ERS and relocate ERS and NIFA outside of the National Capitol Region.)
- Bates Stamp Pgs. 72–76: Content of email exchange.
- Bates Stamp Pgs. 77–81: Content of email exchange.
- DFO’s Third Interim Response (Jan. 29, 2021)
 - Bates Stamp Pgs. 89–99: Content of Cost-Benefit Analysis powerpoint presentation.
 - Bates Stamp Pg. 105: Content of email message.
 - Bates Stamp Pg. 108: Contents of email message.
 - Bates Stamp Pg. 109: Contents of email exchange.
 - Bates Stamp Pg. 111: Contents of email exchange.
 - Bates Stamp Pg. 123: Contents of email message.
 - Bates Stamp Pg. 124: Contents, subject line, and title of attachment to email exchange.
 - Bates Stamp Pg. 135: Contents of email exchange.
 - Bates Stamp Pgs. 137–39: Contents of powerpoint presentation.
 - Bates Stamp Pg. 140: Contents of email exchange.
 - Bates Stamp Pg. 142: Contents of email exchange.
 - Bates Stamp Pg. 146: Contents, subject line, and title of attachment to email exchange.
 - Bates Stamp Pg. 249–50: Contents of email exchange.
- DFO’s Final Interim Response (February 28, 2021)
 - Bates Stamp Pg. 535—44: “Incentivessummary6_10lbyv2.docx” (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)
 - Bates Stamp Pg. 572: Contents of email message.
 - Bates Stamp Pg. 708–09: Contents of email exchange.
 - Bates Stamp Pgs. 735–36: Contents of email exchange.
 - Bates Stamp Pg. 784: Content of email message.
 - Bates Stamp Pgs. 787–89: Contents of email exchange.
- Note, Plaintiffs understand that copy of the cost-benefit analysis draft that was shared by USDA with members of congress and/or congressional staff on or around June 12, 2019. Plaintiffs imagine that this may be one of the withheld drafts referenced in these production, but does not have adequate information to know which version this was. However, USDA’s sharing of this draft outside of

the agency waived any applicability of the deliberative process privilege and Plaintiffs insist that a copy of the shared draft be produced without any withholdings.

- **Adequacy of the Search:** Can the agency provide details on how the search process was conducted—for instance, whether search terms or other methods were used to identify responsive records—to determine whether a supplemental search may be needed?

Relocation Decision Memorandum

Agency Tracking Numbers: 2020-DA-02842-F; 2020-REE-03065-F

AO Tracking Number: USDA-20-0427

- **Withholdings:** Can the agency lift or justify the withholdings on the following pages?
 - o DFO's First Interim Response (Aug. 31, 2021)
 - Bates Stamp Pg. 1: Contents of email message.
 - Bates Stamp Pg. 2–30: "FOUO USDA Site Visits Summary Overview vF.pptx"
 - Bates Stamp Pg. 33: Contents of email exchange.
 - Bates Stamp Pgs. 34–35: "ERS NIFA Final Decision General Talking Points SHH.docx" (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs' request.)
 - Bates Stamp Pgs. 37–39: "WHY KS CITY.docx" (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs' request.)
 - Bates Stamp Pgs. 45–46: Contents of attachment.
 - Bates Stamp Pg. 85: This email references an attachment "FOUO SiteSelectionCostBenefitAnalysis Summary v20190612 v4.xlsx" that was neither produced nor described as withheld. American Oversight asks that USDA produce this attachment." (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs' request.)
 - Bates Stamp Pg. 90: The withheld attachment (the file name is redacted, but from the email subject line it appears to be a summary of incentives). (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs' request.)
 - Bates Stamp Pgs. 148–152: The withheld attachment (the file name is redacted but from the email it appears to be a "Rollout Doc.") (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs' request.)
 - Bates Stamp Pgs 157–160: This withheld attachment (the file name is redacted but the email subject line refers to "NIFA/ERS Draft Decision

Memo”) (To the extent this is not the final version of this document, we would request that USDA identify and produce the final version of this document as responsive to Plaintiffs’ request.)

- **Adequacy of the Search:** Can the agency provide details on how the search process was conducted—for instance, whether search terms or other methods were used to identify responsive records—to determine whether a supplemental search may be needed? Plaintiffs are particularly concerned by the absence of any records documenting the decision to choose Kansas City over the other two finalist locations. Plaintiffs understand that the final choice among the finalists was presented to Secretary Perdue sometime on or after June 6, 2019. Yet USDA has not produced any records of materials given to Secretary Perdue to inform his selection or documenting the Secretary Perdue’s choice or the reasons for it.



United States Department of Agriculture (USDA)

Community and Site Visit Overview

April 2019

Site visit overview

Selection team visits – dates TBD

2020-DA-02836-F

Site Selection Team Functional Visits

Dates TBD – pending MSA short-listing

► Who?

- USDA / EY project team, USDA representatives from ERS, NIFA, Office of Procurement and Property Management (OPPM), and others functional support areas such as HR, Accounting, IT

► What?

- Visit potential sites and surrounding communities to evaluate fit with USDA requirements, prior to developing a formal recommendation

► Where?

- Short-listed MSAs based on medium list location analysis results

► Why?

- Provide site selection team members with local perspective prior to the formal recommendation

► When?

- ~2-2.5 days per community (site); dates TBD

Objectives for site selection team visits:

Gain an in-person overview of each community and fit-for-purpose with USDA's objectives

Visit / view prospective sites

Identify any 'showstoppers' or key issues that could disqualify a site / city

Provide the appropriate context to inform recommendations on the preferred location(s)

Community visit approach

Objectives, guiding principles, and planning / execution

2020-DA-02836-F

Key Objectives

- ▶ Perform detailed due diligence on short-listed MSAs to assess fit-for-purpose for ERS and NIFA's relocations
- ▶ Investigate the following knowledge gap areas through in-market meetings with various parties:
 - Local community agricultural engagement
 - Incentives considerations
 - Economic development initiatives
 - Agricultural education initiatives
 - Community offerings
 - Site-specific idiosyncrasies
- ▶ Determine a preferred site / community and a backup site / community for further due diligence and incentives negotiations

Considerations

- ▶ USDA name will be revealed
- ▶ Assume no need for an NDA
- ▶ Additional materials to be shared with ROI's?
- ▶ The following activities will be performed **after** the community visits, once a preferred site and backup site are determined:
 - Incentives questionnaires and negotiations
 - IT / Security assessments

Planning

1. EY to schedule and coordinate meetings with the support of the **EOI Applicants** and USDA Project Leadership Team and/or designated team
2. EY to iteratively review draft agendas with USDA
3. Certain area-specific meetings (e.g., Agricultural Dept., ARS) may require the respective functions to identify local representative agencies / organizations / service providers. EY will support with overall scheduling and coordination once representative agencies / organizations / service providers are identified.
4. No further information will be provided to **EOI Applicants** or other parties other than what has already been shared in the data request (any exceptions?)

Execution

1. USDA name to be revealed
2. EY will develop detailed agendas, travel timelines, and participant lists in preparation for each community and site visit.
3. Qualitative scorecard to be used by the internal team in morning / evening working sessions to discuss findings and produce high-level scoring (to be held in private meeting rooms)

Illustrative site visit agenda

2020-DA-02836-F

Illustrative Site Visit Agenda

Day One:

Time	Activity
7-8am	Internal team preparation breakfast
8-10:00am	Introduction with EOI Applicant(s)
10:15-11:30	EDC Market Overview
12-1:30pm	Lunch meeting with local EDCs /EOI
1:45-3pm	HR Recruiting Meeting
3-5pm	University / Agricultural departments
5-6pm	Internal debrief
7-9pm	Dinner with group of local agricultural orgs.

Day Two:

Time	Activity
7-8am	Internal team preparation breakfast
8-10:00am	Meeting with RE Broker / Developer & Site Visit
10:15-11:30	Community tour (e.g., housing, hospital, schools)
12-1:30pm	Lunch meeting
1:45-3pm	Meeting with local residential RE broker
3-5pm	Open for meetings (if necessary)
5-6pm	Open for meetings (if necessary)
7-9pm	

Targeted Discussion Around:

**Introduction with EOI
Applicant(s) and or EDC**



- Overview of Community (demographics, education, language skills, labor force)
- Local business climate (historical economic performance and forecasted growth, geopolitical update, government policy changes, lodging etc.)
- Government and other community measures to promote agriculture
- Qualitative factors: quality of life, accessibility, infrastructure, and local culture
- Site specific real estate overviews – facilities, costs, and incentives
- EDC support services and incentives

Visits Options:

- Residential RE broker
- Visit for sale housing
- Visit hospital
- Visit fitness / recreation facilities
- New/ recently expanded company
- Hospitality team / group

Next steps

2020-DA-02836-F

Path to proceed with community and site visits

- 1) Finalize short list of MSAs for community and site visits
- 2) Revise illustrative agenda to ensure coverage over ERS and NIFA objectives
- 3) Discuss travel preparations – attendees, timeline, activities, and payment
- 4) Align on information sharing / communication regulations and guidelines
 - a) i.e., which information cannot be shared with EDCs (e.g., costs and cost allocations)?
- 5) NDA

From: [Esch, Michele - ARS](#)
To: [Boswell, Kristi - OSEC, Washington, DC](#); [Boswell, Kristi J. EOP/WHO](#); [Knupp, Courtney - OSEC, Washington, DC](#); [Tkacz, Kailee - OSEC, Washington, DC](#); [Bice, Don - OSEC, Washington, DC](#)
Subject: FW: Additional Buildings Proposed for Site Tours
Date: Tuesday, May 14, 2019 8:43:06 AM
Attachments: [555-Mangum Flyer.pdf](#)
[220%20NORTH%20MERIDIAN.PDF](#)
[Renner Ridge Corp Center - Lenexa KS.PDF](#)
[Sprint Campus - Overland Park KS.PDF](#)
[Thrive Building - KCMO.PDF](#)

For us to consider and discuss with them at our call at noon. We will also provide feedback on the site visit scorecard they provided us yesterday (and was discussed during our leadership team meeting).

Please let me know if you are not able to make the meeting at noon.

Michele

Michele Esch

Special Projects Coordinator

Executive Director, NAREEE Advisory Board

U.S. Department of Agriculture

(o) 202.720.8408

(c) (b)(6)

michele.esch@ars.usda.gov

From: Sanat Valecha <(b)(6)@ey.com>

Sent: Monday, May 13, 2019 7:51 PM

To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>

Cc: Catherine Von Seggern <(b)(6)@ey.com>; Francisco E Rodriguez

<(b)(6)@ey.com>

Subject: Additional Buildings Proposed for Site Tours

Hello Michele,

(b)(5) DPP

Thank you.

From: [Esch, Michele - ARS](#)
To: [Bice, Don - OSEC, Washington, DC](#)
Subject: FW: Digital Takeaway and Other Questions
Date: Tuesday, May 14, 2019 5:13:03 PM

FYI

Michele Esch

Special Projects Coordinator

Executive Director, NAREEE Advisory Board

U.S. Department of Agriculture

(o) 202.720.8408

(c) (b)(6)

michele.esch@ars.usda.gov

From: Sanat Valecha <(b)(6)@ey.com>
Sent: Tuesday, May 14, 2019 4:45 PM
To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>
Cc: Catherine Von Seggern <(b)(6)@ey.com>; Francisco E Rodriguez <(b)(6)@ey.com>
Subject: RE: Digital Takeaway and Other Questions

Hi Michele,

In addition to the question below from NC, we also received the following questions from Kansas City. Please see below. Thank you!

“Do you have a link to the GSA’s Automated Advanced Acquisition Program that you could share so that we could send to the Landlords to upload their offers? Also, should they submit a letter of intent in place of a lease submission, it says the letter should be submitted within 2 days of the site visit. Is that 2 days prior to the visit, or 2 days after the visit?”

Regards,
 Sanat Valecha

Sanat Valecha | Senior | Advisory Services

Ernst & Young LLP

Office: (b)(6) | (b)(6)@ey.com

From: Sanat Valecha
Sent: Tuesday, May 14, 2019 1:26 PM
To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>
Cc: Catherine Von Seggern <(b)(6)@ey.com>; Francisco E Rodriguez <(b)(6)@ey.com>
Subject: Digital Takeaway

Hello Michele,

Passing along a question we received from the NC EOI applicant. Please see the message below.

“Our team is discussing utilizing an app for our additional information to support our visit. Would you be able to confirm whether the USDA group can download an app for such a purpose?”

Thank you.

Regards,
Sanat Valecha



Sanat Valecha | Senior | Advisory Services

Ernst & Young LLP

5 Times Square, New York, NY 10036, United States of America

Office: (b)(6) | Cell: (b)(6) | (b)(6)@ey.com

Website: <http://www.ey.com>

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United States Department of Agriculture (USDA)

Site Visit Briefing Book: Durham-Chapel Hill, NC

May 16 and May 17, 2019

- 
- Detailed Agenda:**
- ▶ Meetings / activities
 - ▶ Facilitators
 - ▶ Locations

- 
- Site Details:**
- ▶ MSA overview
 - ▶ Site tours (including checklist)

- 
- Meeting Objectives and Scoring:**
- ▶ Key objectives & discussion points
 - ▶ Qualitative scorecards

- 
- Appendix:**
- ▶ Key contacts
 - ▶ Key locations

1. Detailed Agenda

2020-DA-02836-F



Detailed Agenda

Day 1

2020-DA-02836-F
Th., May 16 Fri., May 17

Time	Meeting / Activity	Facilitator(s)	Location
7:30am-8:00am	Hotel breakfast (on an individual basis)	N/A	Homewood Suites Raleigh-Crabtree Valley 5400 Homewood Banks Dr., Raleigh, NC 27612
8:00am-8:30am	Travel to meet EOI consortium and partners		
8:30am-8:45am	USDA project introduction / background	Scott Hutchins Deputy Under Secretary, Research, Education, and Economics	James B. Hunt Library, Room 4107 1070 Partners Way, Raleigh, NC 27606
8:45am-10:45am	Triangle Region Overview, including discussions on Community Overview, Incentives and Business Support, Labor Market / Human Resources, and Commercial Real Estate	Wake County Economic Development, Durham Chamber, NC Commerce, Governor Cooper's office, EDPNC	James B. Hunt Library, Room 4107 1070 Partners Way, Raleigh, NC 27606
10:45am-11:30am	Discussion with local Federal employees	EPA, NIEHS representatives	James B. Hunt Library, Room 4107 1070 Partners Way, Raleigh, NC 27606
11:30am-12:30pm	Residential Real Estate overview and relocation discussion (<i>with concurrent working lunch</i>)	Howard, Perry & Walston Relocation	James B. Hunt Library, Room 4107 1070 Partners Way, Raleigh, NC 27606
12:30pm-1:00pm	Agricultural partnership discussion	Commissioner Troxler, Dean Linton, Larry Wooten, Scott Johnson	James B. Hunt Library, Room 4107 1070 Partners Way, Raleigh, NC 27606

Detailed Agenda (cont'd)

Day 1

2020-DA-02836-F
Th., May 16 Fri., May 17

Time	Meeting / Activity	Facilitator(s)	Location
1:00pm-1:30pm	Travel to Site Tour #1 (555 S. Mangum)		
1:30pm-2:30pm	555 S. Mangum Site Tour	Timothy Downs – Durham Chamber, EDPNC Mac Hammer and Doug Cook – Cushman Wakefield	555 S. Mangum Street Durham, NC 27701
2:30pm-2:45pm	Travel to Site Tour #2 (Parmer 14)		
2:45pm-3:45pm	Parmer 14 Site Tour	Timothy Downs – Durham Chamber, EDPNC Lee Clyburn – CBRE	14 TW Alexander Drive Research Triangle Park, NC 27709
3:45pm-4:00pm	Travel to Site Tour #3 (Lenovo II)		
4:00pm-5:00pm	Lenovo II Site Tour	Wake County Economic Development Jason High – CBRE	1009 Think Place Morrisville, NC 27560
5:00pm-5:30pm	Travel to Site Tour #4 (Crabtree Terrace)		
5:30pm-6:30pm	Crabtree Terrace Site Tour	Wake Economic Development Brian Carr / John Brewer – CBRE	4509 Creedmoor Road Raleigh, NC 27612
6:30pm-7:00pm	Return to hotel		
7:00pm-8:00pm	Internal team debrief	Ernst & Young	Homewood Suites Raleigh-Crabtree Valley 5400 Homewood Banks Dr., Raleigh, NC 27612
8:00pm-10:00pm	Dinner	N/A	TBD

Detailed Agenda (cont'd)

Day 2

2020-DA-02836-F
Th., May 16 Fri., May 17

Time	Meeting / Activity	Facilitator(s)	Location
7:00am-7:30am	Hotel breakfast (on an individual basis)	N/A	Homewood Suites Raleigh-Crabtree Valley 5400 Homewood Banks Dr., Raleigh, NC 27612
7:30am-8:00am	Travel to meet EOI consortium and partners		
8:00am-8:30am	Internal team morning debrief (as needed)	Ernst & Young	EDPNC Boardroom 15000 Weston Parkway, Cary, NC 27513
8:30am-9:00am	University partnership discussion	UNC System, Duke University, NCSU	EDPNC Boardroom 15000 Weston Parkway, Cary, NC 27513
9:00am-9:15am	Travel to Site Tour #5 (11000 Weston Parkway)		
9:15am-10:00am	11000 Weston Parkway Site Tour	Wake County Economic Development Jane Doggett – Highwoods Properties	11000 Weston Parkway Cary, NC 27513
10:00am-10:15am	Travel to Alexandria AgTech Center		
10:15am-11:30am	Triangle Employer Roundtable Discussion	Major Triangle Employers	5 Laboratory Drive Research Triangle, NC 27709
11:30am-11:45am	Travel to RDU for departure, with discussion on airport improvements	Michael Landguth	Raleigh-Durham International Airport 2400 John Brantley Boulevard, Morrisville, NC 27560
2:00pm-6:00pm	Departure		

2. Meeting Objectives and Scoring

2020-DA-02836-F



Key Objectives and Discussion Points

2020-DA-02836-F

Category	Key Objectives / Discussion Points
Community Overview	▶ Provide an introductory overview of community demographics and statistics (education levels, labor force characteristics, GDP, race / ethnicity, religious affiliations, etc.) and geography (review maps showing major residential areas, office parks, recreational areas, cultural attractions, etc.) ▶ Review the local business climate ○ Historical economic performance and forecasted growth ○ Geopolitical update and government policy changes ○ Top employers (federal and commercial) ○ Agricultural organizations ▶ Understand major economic, research, and public policy-making institutes (major research university, land grant university, state capital, other Federal research agencies, Federal Statistical Data Research Center) ▶ Review lodging and hospitality options (hotels, number of rooms, conference space, etc.)
Incentives and Business Support	▶ Provide detailed breakdown of state and local government incentives offered in EOI, as well as any additional available incentives ○ Applicability to USDA ○ Estimated lifetime value / savings ○ Qualification process ○ Terms and conditions ▶ Support for employee and family relocation ○ Assess availability of employee relocation support incentives ○ Discuss employment programs / job placement for spouses and partners of relocated employees ○ Review housing, school, and dependent care options ○ Understand availability of temporary office space

Key Objectives and Discussion Points (cont'd)

2020-DA-02836-F

Category	Key Objectives / Discussion Points
Labor Market / Human Resources	▶ Labor market statistical overview for the community (education levels, size of pool, competition, federal agencies, other characteristics) ▶ Dual career considerations for spouses / partners of relocating employees ○ Brief overview of typical recruiting process, timeline and associated costs in the local market (how are positions advertised, how are candidates sourced, pre-screened, assessed, interviewed, hired, etc.) ○ Job placement programs ○ University and research employment opportunities ▶ Availability of contractor resources in the area
Residential Real Estate and Quality of Life	▶ Provide overview of local residential real estate market ○ Availability of housing, and potential effects of large influx of residents ○ Typical costs (lease and buy) ○ Neighborhoods and schools ○ Commuting options ▶ Discuss quality of life considerations ○ Cultural and recreational activities (parks, museums, sports, music, theater, food, shopping, zoos, agricultural events, etc.) ○ Community diversity (including discussion on faith-based / religious organizations) ○ Healthcare availability and cost (including diversity of specialty care, trauma centers, veterans' healthcare, VA hospitals) ○ Accessible transportation (trolleys, buses, light rail / trains, biking, walking) ○ Education (primary, secondary, continuing, special needs) ○ Crime and safety statistics

Key Objectives and Discussion Points (cont'd)

2020-DA-02836-F

Category	Key Objectives / Discussion Points
Commercial Real Estate Overview	▶ Provide overview of local commercial real estate market ○ Availability of Class A space ○ Market rates and economic trends ○ Commercial office hub locations, in relation to public transportation, local conveniences, major residential areas, CBDs, etc. ○ Leading area developers ○ Local construction / interior fit-out costs ▶ Contextualize and assess sites proposed in EOIs relative to other available space in the MSA
Site Tours	▶ Provide an overview of each building including: ○ Tour of space on offer ○ Other tenants in the buildings ○ Building amenities (onsite medical facility, transportation for employees, fitness center, etc.) ○ Infrastructure and security ○ Physical access (major highways and rail networks) ○ Phases of development and future growth plans ○ Local climate conditions and seismic ratings ○ Codes and local regulations (green space, zoning / ordinances, production / occupancy permits, construction permits, fire, noise, emissions, etc.) ○ Location in relation to public transportation, local conveniences, major residential areas, CBDs, etc. ▶ Communications and IT infrastructure ○ Current infrastructure specs (Wi-Fi, video-conferencing, etc.) ○ Ability to comply with federal IT security requirements (existing capabilities, timeline and cost to enhance, etc.)

Qualitative Scorecard

Community Overview (pg. 1 of 1)

2020-DA-02836-F

Sub-Category	Criteria	Notes
Demographics and geography	General demographic profile (GDP, income, age, sex, marital status, employment, etc.)	
Demographics and geography	Racial, ethnic, and religious diversity	
Demographics and geography	Education levels (focus on research-oriented)	
Demographics and geography	General geographic layout / city-planning	
Local business climate	Historical economic performance and forecasted growth	
Local business climate	Agricultural organizations	
Major economic, research, and policy institutes	Number of and proximity to land grant universities / major research universities (R1)	
Major economic, research, and policy institutes	Other Federal research agencies	
Lodging and hospitality	Hotels and hotel room capacity and availability	
Lodging and hospitality	Convention / conference space capacity and availability	

Qualitative Scorecard

2020-DA-02836-F

Incentives and Business Support (pg. 1 of 1)

Sub-Category	Criteria	Notes
State and Local Incentives	Breadth and depth of incentives offered	
State and Local Incentives	Estimated quantitative value of incentives offered	
State and Local Incentives	Initial perceived applicability of incentives to USDA	
Business and Employee Support	Availability and cost of temporary office space	
Business and Employee Support	Availability and \$ value of employee relocation support incentives	
Business and Employee Support	Availability of employment programs / job placement for spouses and partners	
Business and Employee Support	Availability of support for employee housing, school, and dependent care	

Qualitative Scorecard

2020-DA-02836-F

Labor Market / Human Resources (pg. 1 of 1)

Sub-Category	Criteria	Notes
Dual Career Considerations	Sufficient employment opportunities in the market (at the appropriate skill level)	
Dual Career Considerations	Availability of job placement / employment programs	
Dual Career Considerations	Availability of local recruiting / hiring support	
Federal, University, and Research Employment	Peer Federal agencies / companies	
Federal, University, and Research Employment	University and research employment opportunities	
Contractor Resources	Availability to access contractor resources / temp agencies	

Qualitative Scorecard

2020-DA-02836-F

Residential Real Estate and Quality of Life (pg. 1 of 2)

Sub-Category	Criteria	Notes
Housing Market	Availability of residential housing	
Housing Market	Quality of residential housing	
Housing Market	Residential real estate cost statistics (lease and buy)	
Community Diversity	Track record of diversity and tolerance in the city	
Community Diversity	Variety of faith-based / religious organizations	
Educational Quality	Quality of public school districts	
Educational Quality	Higher education	
Educational Quality	Dependent care	
Educational Quality	Special education	
Educational Quality	Availability of private schools	

Qualitative Scorecard

2020-DA-02836-F

Residential Real Estate and Quality of Life (pg. 2 of 2)

Sub-Category	Criteria	Notes
Healthcare	Proximity to major hospitals and hospital systems (within 25 miles)	
Healthcare	Diversity of specialty care (including Level 1 trauma centers)	
Healthcare	Veterans Affairs hospital	
Transportation and Accessibility	Public transportation availability, reach, and usage (ADA compliant buses, trolleys, light rail / trains)	
Transportation and Accessibility	Density of biking and walking paths / trails	
Cultural and Recreational	Cultural attractions (variety of genres and price points for museums, zoos, botanical gardens, theatre, musical venues, shopping, art galleries, agricultural events, etc.)	
Cultural and Recreational	Recreational activities (i.e., parks, green space, gyms and indoor facilities, professional sports teams, amateur sports leagues, etc.)	

Qualitative Scorecard

2020-DA-02836-F

Commercial Real Estate Overview (pg. 1 of 1)

Sub-Category	Criteria	Notes
Strength of Local Market	Overview of local Class A office space market (number of buildings, available SF, total SF, market rates for base rent and OPEX, trends)	
Strength of Local Market	Location of office parks / hubs (relative to transportation options, major residential areas, CBDs, etc.)	
Strength of Local Market	Contextualization of buildings proposed in EOI	
Strength of Local Market	Local construction cost statistics (including breakdown with interior fit-out costs and timeline)	

3. Site Details

2020-DA-02836-F

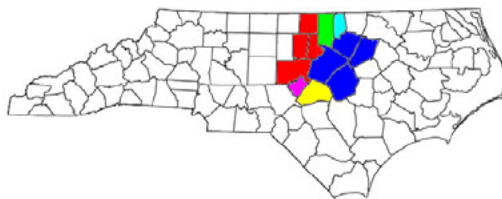


Durham-Chapel Hill, NC

MSA Overview

2020-DA-02836-F

Location Snapshot



■ = Durham-Chapel Hill MSA

Population (MSA): 575,412
Workforce Population (MSA): 300,576
Time Zone: Eastern
Airport: Raleigh-Durham International
Cost of Living Adjustment: 19.52%
State Capital: Raleigh
Number of Sites: 4

Education Statistics	Value
Annual Number of University Graduates	18,747
Agricultural degree graduates in 2017 (state)	3,370
% of Population with Bachelor's degree	46.3%
Public School Ranking (state)	23
Leading School Districts	Chapel Hill-Carrboro City Schools, Wake County Schools, Orange County Schools

Institutions and Facilities	Value
Land-Grant Universities	No, but NC State is in an adjacent MSA (Raleigh, colored blue on map)
Research 1 (R1) Universities	Duke University, University of North Carolina at Chapel Hill
Census Research Data Center	Duke University
ARS Facility	No

Quality of Life

- ▶ The Research Triangle is a "brainpower cluster" with one of the highest concentrations of educated talent in the country.
- ▶ NC State had 401 research collaborations and more than \$43.5 million in total funding from the USDA during Federal Fiscal Year 2017.
- ▶ The International Festival showcases music, dance, cuisine, art, and cultural education from 55 diverse cultures, and welcomes 30,000 visitors annually.

Infrastructure

IT Security / Broadband	▶ The North Carolina Next Generation Network (NCNGN), spearheaded by Duke, NC State, Wake Forest University and UNC, along with six municipalities, is working to provide gigabit internet service to the region
Transportation	▶ Multiple large-scale investments in place for enhanced transit, including light rail to connect 3 major universities and bus services. ▶ Raleigh-Durham International Airport (RDU), ranked by MIT as the most connected medium-sized airport in the U.S., is centrally located within the Triangle region and only a 10-17 minute drive, on average, from the proposed sites

Labor Market Considerations	Value
Labor force growth rate	1.64%
Unemployment rate	3.30%
Percentage of jobs within 6 USDA-identified representative BLS occupational codes	41.95%
Civilian federal workers (state)	42,772

Durham-Chapel Hill, NC

Site Tour 1 of 5

2020-DA-02836-F
Th., May 16 Fri., May 17

Site Name: 555 S. Mangum Street, Durham, NC

EOI Name: NC Research Triangle

EOI Applicant Name(s): Wake County, Durham County and Research Triangle Park

Site Details	Values
Owner	TBD
Size	145,110 available SF (floors 4-10) out of 242,063 total SF (11 stories); Delivery date Q4
Costs	\$37.50 psf – Floors 9 & 10 \$36.00 psf – Floors 8 & 9 \$35.00 psf – Floors 4, 5, 6, 7 OPEX are estimated at \$10.08 psf
Fit-Out	TI allowance: \$50+ psf depending on lease term



Criteria	Yes / No	Notes
General		
Physical location of site	N/A	
Site cost (lease rate and OPEX)	N/A	
Ability to support USDA space requirements with minimal fit-out		
Ability to support USDA IT requirements with minimal fit-out		
Availability of conference space		
Proximity to lodging		
Proximity to diverse dining options		
Safety considerations in the area		
Noise levels in the area		
Transportation / commuting options		
Amenities		
Secure facility with aesthetic barrier around full building perimeter		
On-site child care		
On-site fitness center		
On-site cafeteria / food court		
Indoor and outdoor spaces		
On-site banking options / credit unions		
Occupational health clinic		

Durham-Chapel Hill, NC

Site Tour 2 of 5

2020-DA-02836-F
Th., May 16 Fri., May 17

Site Name: Parmer 14, 14 TW Alexander Drive, Research Triangle Drive, NC

EOI Name: NC Research Triangle

EOI Applicant Name(s): Wake County, Durham County and Research Triangle Park

Site Details	Values
Owner	Parmer RTP, LLC
Size	175,000 sf (3 stories); Full building available
Costs	\$15.50 psf (NNN) with a lease term of 10+ years
Fit-Out	TI allowance: \$50 psf



Criteria	Yes / No	Notes
General		
Physical location of site	N/A	
Site cost (lease rate and OPEX)	N/A	
Ability to support USDA space requirements with minimal fit-out		
Ability to support USDA IT requirements with minimal fit-out		
Availability of conference space		
Proximity to lodging		
Proximity to diverse dining options		
Safety considerations in the area		
Noise levels in the area		
Transportation / commuting options		
Amenities		
Secure facility with aesthetic barrier around full building perimeter		
On-site child care		
On-site fitness center		
On-site cafeteria / food court		
Indoor and outdoor spaces		
On-site banking options / credit unions		
Occupational health clinic		

Durham-Chapel Hill, NC

Site Tour 3 of 5

2020-DA-02836-F
Th., May 16 Fri., May 17

Site Name: Lenovo I, 1009 Think Place, Morrisville, NC
EOI Name: NC Research Triangle
EOI Applicant Name(s): Wake County, Durham County and Research Triangle Park

Site Details	Values
Owner	SVT Lenovo BTS I, LP (JV partnership of Starwood Capital Group, Vanderbilt Partners, and Trinity Capital Advisors)
Size	183,032 sf (5 stories); Full building available as of Sept. 2019
Costs	\$26.50 – \$27.50 psf (full-service gross), increasing 3% annually
Fit-Out	TI allowance: \$35 – \$45 psf



Criteria	Yes / No	Notes
General		
Physical location of site	N/A	
Site cost (lease rate and OPEX)	N/A	
Ability to support USDA space requirements with minimal fit-out		
Ability to support USDA IT requirements with minimal fit-out		
Availability of conference space		
Proximity to lodging		
Proximity to diverse dining options		
Safety considerations in the area		
Noise levels in the area		
Transportation / commuting options		
Amenities		
Secure facility with aesthetic barrier around full building perimeter		
On-site child care		
On-site fitness center		
On-site cafeteria / food court		
Indoor and outdoor spaces		
On-site banking options / credit unions		
Occupational health clinic		

Durham-Chapel Hill, NC

Site Tour 4 of 5

2020-DA-02836-F
Th., May 16 Fri., May 17

Site Name: Crabtree Terrace, 4509 Creedmoor Rd., Raleigh, NC

EOI Name: NC Research Triangle

EOI Applicant Name(s): Wake County, Durham County and Research Triangle Park

Site Details	Values
Owner	East West Partners Club Management
Size	127,600 available SF, out of 174,000 total SF (Under construction, est. delivery Oct. 2019)
Costs	\$28 – \$34 psf (full-service gross)
Fit-Out	No TI allowance offered



Criteria	Yes / No	Notes
General		
Physical location of site	N/A	
Site cost (lease rate and OPEX)	N/A	
Ability to support USDA space requirements with minimal fit-out		
Ability to support USDA IT requirements with minimal fit-out		
Availability of conference space		
Proximity to lodging		
Proximity to diverse dining options		
Safety considerations in the area		
Noise levels in the area		
Transportation / commuting options		
Amenities		
Secure facility with aesthetic barrier around full building perimeter		
On-site child care		
On-site fitness center		
On-site cafeteria / food court		
Indoor and outdoor spaces		
On-site banking options / credit unions		
Occupational health clinic		

Durham-Chapel Hill, NC

Site Tour 5 of 5

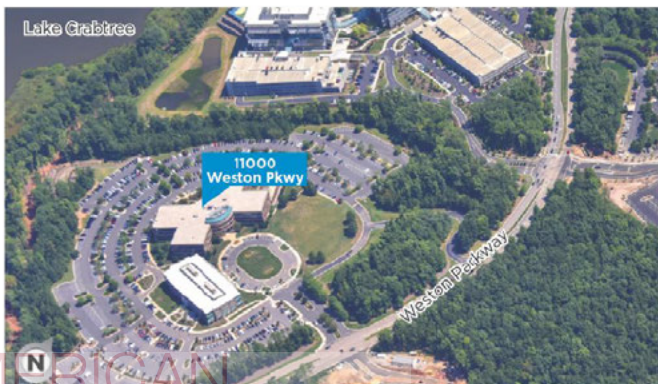
2020-DA-02836-F
Th., May 16 Fri., May 17

Site Name: 11000 Weston Parkway, Cary, NC

EOI Name: NC Research Triangle

EOI Applicant Name(s): Wake County, Durham County and Research Triangle Park

Site Details	Values
Owner	Highwoods Properties
Size	178,300 sf (4 stories); Full building available
Costs	\$27 - \$30 psf (NNN)
Fit-Out	TI allowance: \$40 psf



Criteria	Yes / No	Notes
General		
Physical location of site	N/A	
Site cost (lease rate and OPEX)	N/A	
Ability to support USDA space requirements with minimal fit-out		
Ability to support USDA IT requirements with minimal fit-out		
Availability of conference space		
Proximity to lodging		
Proximity to diverse dining options		
Safety considerations in the area		
Noise levels in the area		
Transportation / commuting options		
Amenities		
Secure facility with aesthetic barrier around full building perimeter		
On-site child care		
On-site fitness center		
On-site cafeteria / food court		
Indoor and outdoor spaces		
On-site banking options / credit unions		
Occupational health clinic		

4. Appendix

2020-DA-02836-F



Economic Development Partnership of North Carolina (EDPNC)

▶ Laura Lee

Business Recruitment Manager, Food
Processing

M: (b)(6); O: (919) 447-7806
laura.lee@edpnc.com

▶ David Spratley

Vice President, Business Recruitment

M: (b)(6); O: (919) 447-7736
david.spratley@edpnc.com

Ernst & Young (EY)

▶ Catherine Von Seggern

Executive Director, Construction and Real
Estate Advisory Services

M: (b)(6)
[\(b\)\(6\)@ey.com](mailto:(b)(6)@ey.com)

▶ Sanat Valecha

Senior, Construction and Real Estate
Advisory Services

M: (b)(6)
[\(b\)\(6\)@ey.com](mailto:(b)(6)@ey.com)

Key Locations Meetings

2020-DA-02836-F

← NC

Private · 3 places

NC

The Economic Development Partnership of North Carolina

5.0 ★★★★★ (1)

Economic development agency · Cary

5 Laboratory Dr

Research Triangle, NC 27709

James B. Hunt Jr. Library

4.7 ★★★★★ (220)

University library · Raleigh

Open until 6:00 PM

AMERICAN
OVERSIGHT

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0091
USDA-20-0424-D-000039

2020-DA-02836-F

AMERICAN
OVERSIGHT

Key Locations

Airport, Lodging, and Selected Restaurants

2020-DA-02836-F

← NC

Private · 5 places

Raleigh-Durham International Airport

4.2 ★★★★★ (1,271)

Airport · 2400 John Brantley Blvd

Airport with a park to observe planes



Homewood Suites Raleigh-Crabtree Valley

\$157

4.3 ★★★★★ (442)

3-star hotel

An extended-stay hotel with a pool

Free Wi-Fi Free breakfast



Hilton Garden Inn Raleigh /Crabtree Valley

\$115

4.6 ★★★★★ (624)

3-star hotel

Relaxed hotel with a pool, gym & dining

Free Wi-Fi Free breakfast



The Pit Authentic Barbecue

4.3 ★★★★★ (3,865)

\$\$ · Barbecue · 328 W Davie St

BBQ eatery featuring free-range pork

Open until 10:00 PM



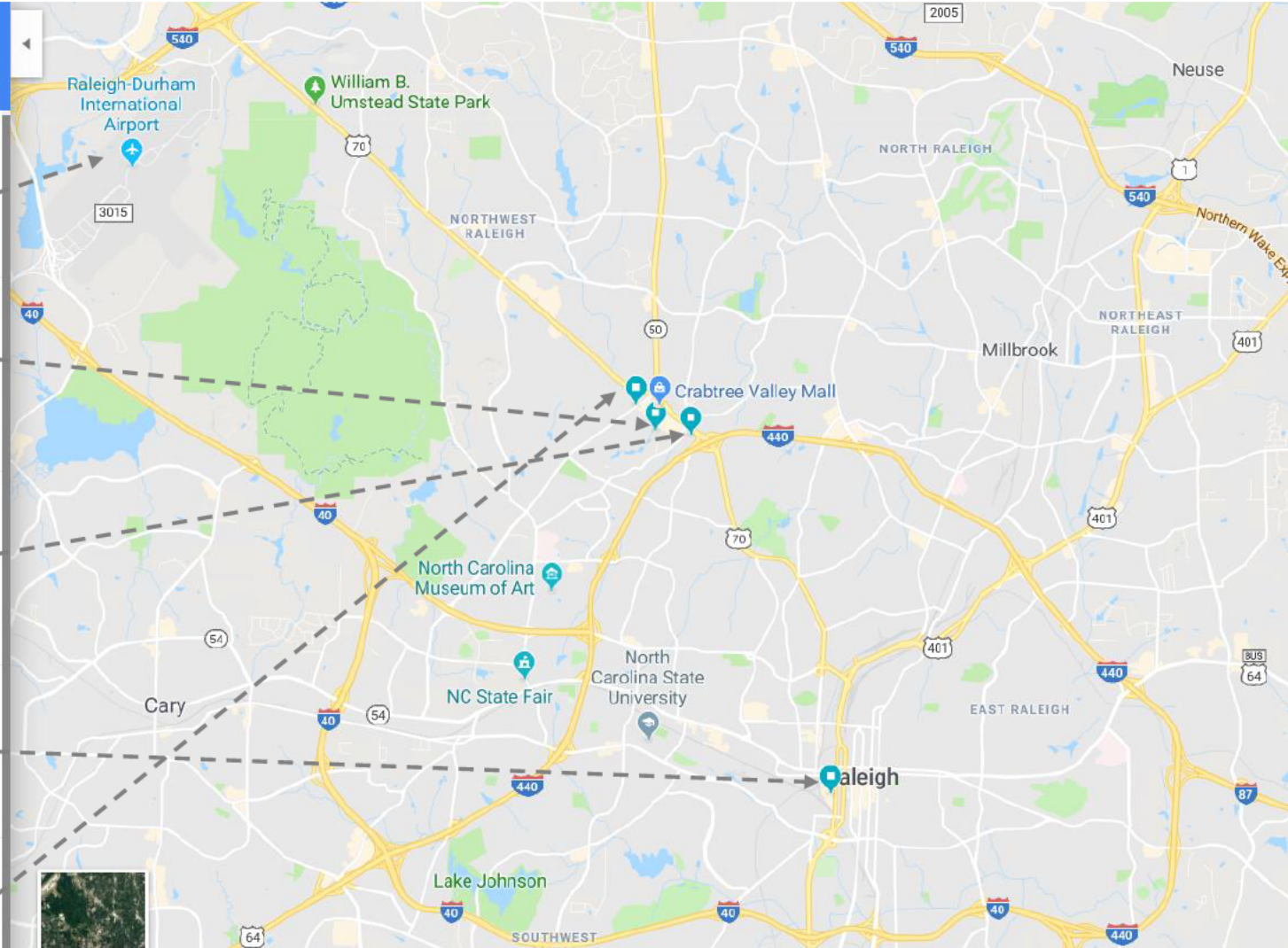
J. Alexander's Restaurant

4.5 ★★★★★ (1,020)

American · 4600 Crabtree Valley Ave

Contemporary American eatery with a bar





AMERICAN
OVERSIGHT

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0093
USDA-20-0424-D-000041

Key Locations

Additional Restaurant Options

2020-DA-02836-F

- ▶ [Downtown Raleigh](#) boasts a wide range of foodie favorites.
 - ▶ [Bida Manda](#)- Laotian Restaurant and Bar
 - ▶ [Brewery Bhavana](#)- Top 10 coolest places to eat in the world, Forbes
 - ▶ [City Market Sushi](#)- Sushi
 - ▶ [Fiction Kitchen](#)- Vegan/Vegetarian restaurant with 100% vegetarian kitchen
 - ▶ [Garland](#)- Asian/Indian- James Beard Award Nominated Chef
 - ▶ [Poole's Diner](#)- Ashley Christensen, 2019 James Beard Outstanding Chef of the Year
 - ▶ [Vic's Italian Restaurant](#)- Old World Italian Cuisine
 - ▶ [The Pit BBQ](#)- Authentic Barbecue: whole-hog, pit-cooked
 - ▶ [Vidrio](#)- Mediterranean cuisine
- ▶ For options in the immediate Crabtree area, suggestions are:
 - ▶ [Bella Monica](#)- Italian comfort food
 - ▶ [J. Alexander's](#) -Upscale American chain
- ▶ [North Hills](#) is a vibrant live/work/play community in Midtown Raleigh. **Please note that there will be a Beach Music Series on Thursday evening from 6-9 PM.** Restaurant options range from fast casual to high end, including:
 - ▶ [Bartaco](#)- upscale street food chain with coastal vibe
 - ▶ [CO](#)-Southeast Asian Fusion
 - ▶ [Coquette Brasserie](#)- French Inspired Bistro
 - ▶ [Vivace](#)- Updated Italian
- ▶ [Cameron Village](#) is a quaint shopping village just outside downtown Raleigh, with a variety of dining choices.
 - ▶ [Café Carolina and Bakery](#)- Neighborhood café and bakery
 - ▶ [Tazza Kitchen](#)- Wood fired cooking with seasonal menu
 - ▶ [SO.CA](#)- Caribbean/Central & South American Dishes

From: [Hutchins, Scott - OSEC, Washington, DC](#)
To: [Johansson, Robert - OCE](#); [Boswell, Kristi - OSEC, Washington, DC](#); [Tkacz, Kailee - OSEC, Washington, DC](#); [Knupp, Courtney - OSEC, Washington, DC](#)
Subject: FW: visits
Date: Wednesday, May 8, 2019 5:48:06 PM
Attachments: [image003.png](#)

FYI. (b)(5) DPP ...

Scott H. Hutchins, Ph.D.



Deputy Under Secretary
 Research, Education, and Economics
 United States Department of Agriculture
 Office: 202.720.1542

From: Hutchins, Scott - OSEC, Washington, DC
Sent: Wednesday, May 8, 2019 5:39 PM

To: Leibtag, Ephraim - ERS <ELEIBTAG@ers.usda.gov>; Hartley, Chris - ERS <CHARTLEY@ERS.USDA.GOV>
Subject: RE: visits

Good plan ... any chance you have a Sr. Leader who would be relocating to address that angle too?

Scott H. Hutchins, Ph.D.



Deputy Under Secretary
 Research, Education, and Economics
 United States Department of Agriculture
 Office: 202.720.1542

From: Leibtag, Ephraim - ERS
Sent: Wednesday, May 8, 2019 5:36 PM

To: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>; Hartley, Chris - ERS <CHARTLEY@ERS.USDA.GOV>
Subject: Re: visits

Scott,

Chris and I have been the two people managing the drama up until this point and I would have concerns if both of us were to be away for multiple days at the same time given the current temperature here.

I have two other approaches for consideration:

1. (b)(5) DPP .

(b)(5) DPP

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

2. Chris represent OCE and we send another ERS Senior Leader to represent ERS.

This would allow me to better ensure stability within the agency, while providing an opportunity for someone with long-term experience regarding the needs of ERS (as an agency to complete its mission) to gather information with the team on the site visits.

Happy to discuss whenever convenient.

Thanks,

Ephraim

(b)(6)

From: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>

Sent: Wednesday, May 8, 2019 5:09 PM

To: Leibtag, Ephraim - ERS; Hartley, Chris - ERS

Subject: FW: visits

I'm OK with this ... but (b)(5) DPP

[REDACTED]

[REDACTED]



Scott H. Hutchins, Ph.D.

Deputy Under Secretary

Research, Education, and Economics

United States Department of Agriculture

Office: 202.720.1542

From: Johansson, Robert

- OCE

Sent: Wednesday, May 8,

2019 4:42 PM

To: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>; Boswell, Kristi - OSEC,

Washington, DC <kristi.boswell@usda.gov>

Subject: visits

Hi Scott and Kristi,

(b)(5) DPP, (b)(6)

(b)(5) DPP, (b)(6)

(b)(5) DPP, (b)(6)

(b)(5) DPP, (b)(6)

If you are all good with that, then let's have that be the plan.

I don't need to go, and it may be difficult for me to get away anyways based on some separate issues.

Rob



Robert Johansson, Chief Economist
U.S. Department of Agriculture
Whitten Building, Room 112-A
Washington, DC 20250-3810
☎ 202-720-4164 & 202-720-5955
🌐 <https://www.usda.gov/OCE/>

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Community Overview

Pass / Fail (Pass=10 and Fail=1, unless otherwise specified in "Score" column)					
Sub-Category	Criteria	Score (10=best, 1=worst)	Responsible for Assessment	Notes	
Demographics and geography	General demographic profile (GDP, income, age, sex, marital status, employment, etc.)			TBD	
Demographics and geography	Racial, ethnic, and religious diversity			TBD	
Demographics and geography	Education levels (focus on research-oriented)			TBD	
Demographics and geography	General geographic layout / city-planning			TBD	
Local business climate	Historical economic performance and forecasted growth			TBD	
Local business climate	Agricultural organizations			TBD	
Major economic, research, and policy institutes	Number of and proximity to land grant universities / major research universities (R1)			TBD	
Major economic, research, and policy institutes	Other Federal research agencies			TBD	
Lodging and hospitality	Hotels and hotel room capacity and availability			TBD	
Lodging and hospitality	Convention / conference space capacity and availability			TBD	

Labor

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Incentives / Business Support

Pass / Fail (Pass=10 and Fail=1, unless otherwise specified in "Score" column)					
Sub-Category	Criteria		Score (10=best, 1=worst)	Responsible for Assessment	Notes
State and Local Incentives	Breadth and depth of incentives offered			TBD	
State and Local Incentives	Estimated quantitative value of incentives offered			TBD	
State and Local Incentives	Initial perceived applicability of incentives to USDA			TBD	
Business and Employee Support	Availability and cost of temporary office space			TBD	
Business and Employee Support	Availability and \$ value of employee relocation support incentives			TBD	
Business and Employee Support	Availability of employment programs / job placement for spouses and partners			TBD	
Business and Employee Support	Availability of support for employee housing, school, and dependent care			TBD	

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Labor Market / Human Resources

Pass / Fail (Pass=10 and Fail=1, unless otherwise specified in "Score" column)					
Sub-Category	Criteria		Score (10=best, 1=worst)	Responsible for Assessment	Notes
Dual Career Considerations	Sufficient employment opportunities in the market (at the appropriate skill level)			TBD	
Dual Career Considerations	Availability of job placement / employment programs			TBD	
Dual Career Considerations	Availability of local recruiting / hiring support			TBD	
Federal, University, and Research Employment	Peer Federal agencies / companies			TBD	
Federal, University, and Research Employment	University and research employment opportunities			TBD	
Contractor Resources	Availability to access contractor resources / temp agencies			TBD	

Labor

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Residential Real Estate / Quality of Life					
Sub-Category	Criteria	Pass / Fail (Pass=10 and Fail=1, unless otherwise specified in "Score" column)	Score (10=best, 1=worst)	Responsible for Assessment	Notes
Housing Market	Availability of residential housing			TBD	
Housing Market	Quality of residential housing			TBD	
Housing Market	Residential real estate cost statistics (lease and buy)			TBD	
Community Diversity	Track record of diversity and tolerance in the city			TBD	
Community Diversity	Variety of faith-based / religious organizations			TBD	
Educational Quality	Quality of public school districts			TBD	
Educational Quality	Higher education			TBD	
Educational Quality	Dependent care			TBD	
Educational Quality	Special education			TBD	
Educational Quality	Availability of private schools			TBD	
Healthcare	Proximity to major hospitals and hospital systems (within 25 miles)			TBD	
Healthcare	Diversity of specialty care (including Level 1 trauma centers)			TBD	
Healthcare	Veterans Affairs hospital			TBD	
Transportation and Accessibility	Public transportation availability, reach, and usage (ADA compliant buses, trolleys, light rail / trains)			TBD	
Transportation and Accessibility	Density of biking and walking paths / trails			TBD	
Cultural and Recreational	Cultural attractions (variety of genres and price points for museums, zoos, botanical gardens, theatre, musical venues, shopping, art galleries, agricultural events, etc.)			TBD	
Cultural and Recreational	Recreational activities (i.e., parks, green space, gyms and indoor facilities, professional sports teams, amateur sports leagues, etc.)			TBD	

Labor

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Commercial Real Estate Overview

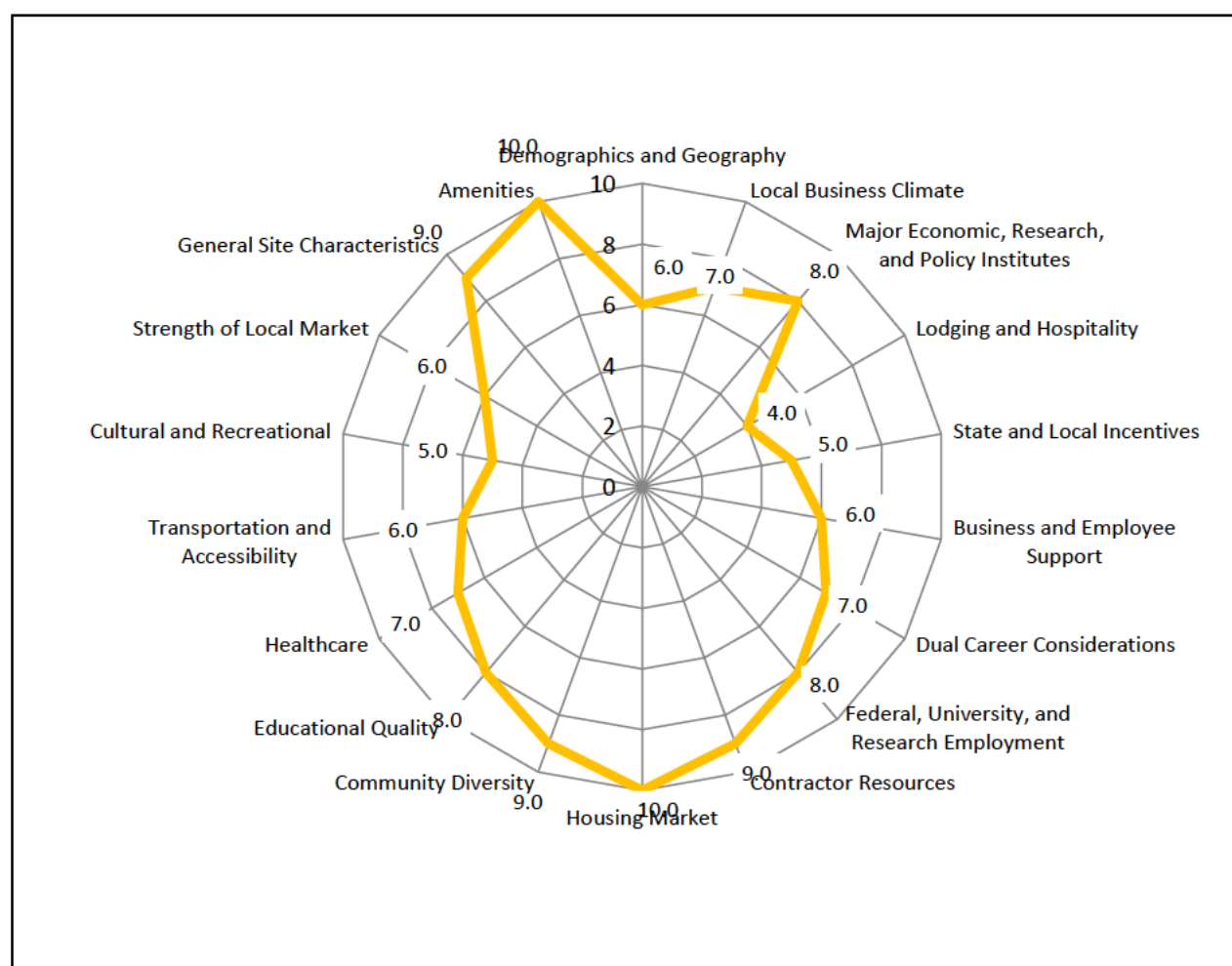
Pass / Fail (Pass=10 and Fail=1, unless otherwise specified in "Score" column)					
Sub-Category	Criteria		Score (10=best, 1=worst)	Responsible for Assessment	Notes
Strength of Local Market	Overview of local Class A office space market (number of buildings, available SF, total SF, market rates for base rent and OPEX, trends)			TBD	
Strength of Local Market	Location of office parks / hubs (relative to transportation options, major residential areas, CBDs, etc.)			TBD	
Strength of Local Market	Contextualization of buildings proposed in EOI				
Strength of Local Market	Local construction cost statistics (including breakdown with interior fit-out costs and timeline)			TBD	
				TBD	
				TBD	
				TBD	
				TBD	
				TBD	
				TBD	
				TBD	
				TBD	
				TBD	
			N/A	TBD	
				TBD	
				TBD	
				TBD	

Labor

Site Visit Qualitative Scorecard - DRAFT v2
Today's Date: 5/13/19

Site Tours			
Sub-Category	Criteria	Checklist (Yes / No)	Notes
General	Physical location of site		
General	Site cost (lease rate and OPEX)		
General	Ability to support USDA space requirements with minimal fit-out		
General	Ability to support USDA IT requirements with minimal fit-out		
General	Availability of conference space		
General	Proximity to lodging		
General	Proximity to diverse dining options		
General	Safety considerations in the area		
General	Noise levels in the area		
General	Transportation / commuting options (public transportation, bike lanes, sidewalks, shuttle service, ample and secure parking, etc.)		
Amenities	Secure facility with aesthetic barrier (i.e., pillars, cement planters, etc.) around full building perimeter		
Amenities	On-site child care		
Amenities	On-site fitness center		
Amenities	On-site cafeteria / food court		
Amenities	Indoor and outdoor spaces		
Amenities	On-site banking options / credit unions		
Amenities	Occupational health clinic		

Category	Sub-Category	DUMMY SCORES	
		Average Score	Max Score
1 Community Overview	Demographics and Geography	6.0	10
1 Community Overview	Local Business Climate	7.0	10
1 Community Overview	Major Economic, Research, and Policy Institutes	8.0	10
1 Community Overview	Lodging and Hospitality	4.0	10
2 Incentives and Business Support	State and Local Incentives	5.0	10
2 Incentives and Business Support	Business and Employee Support	6.0	10
3 Labor Market / Human Resources	Dual Career Considerations	7.0	10
3 Labor Market / Human Resources	Federal, University, and Research Employment	8.0	10
3 Labor Market / Human Resources	Contractor Resources	9.0	10
4 Residential RE and Quality of Life	Housing Market	10.0	10
4 Residential RE and Quality of Life	Community Diversity	9.0	10
4 Residential RE and Quality of Life	Educational Quality	8.0	10
4 Residential RE and Quality of Life	Healthcare	7.0	10
4 Residential RE and Quality of Life	Transportation and Accessibility	6.0	10
4 Residential RE and Quality of Life	Cultural and Recreational	5.0	10
5 Commercial RE Overview	Strength of Local Market	6.0	10
6 Site Tours	General Site Characteristics	9.0	10
6 Site Tours	Amenities	10.0	10





United States Department of Agriculture (USDA)

Site Visit Objectives

May 8, 2019

For Official Use Only (FOUO) | Pre-Decisional | Deliberative

- ▶ Understand and align with the USDA's objectives for the upcoming site and community visits
- ▶ Jointly prepare a structured 1.5 -2 day site visit agenda that offers visiting representatives an opportunity to assess fit with the USDA's objectives
- ▶ Determine plan to finalize logistics (i.e., timing, meetings, tours, facilitators, lodging, transportation, etc.)

Objectives Categories

1. Community Overview
2. Incentives and Business Support
3. Labor Market / Human Resources
4. Residential Real Estate and QoL
5. Commercial Real Estate Overview
6. Site Tours

For Official Use Only (FOUO) | Pre-Decisional | Deliberative

Objectives and Discussion Points

2020-REE-03063-F

Category	Key Objectives / Discussion Points
Community Overview	▶ Provide an introductory overview of community demographics and statistics (education levels, labor force characteristics, GDP, race / ethnicity, religious affiliations, etc.) and geography (review maps showing major residential areas, office parks, recreational areas, cultural attractions, etc.) ▶ Review the local business climate ○ Historical economic performance and forecasted growth ○ Geopolitical update and government policy changes ○ Top employers (federal and commercial) ○ Agricultural organizations ▶ Understand major economic, research, and public policy-making institutes (major research university, land grant university, state capital, other Federal research agencies, Federal Statistical Data Research Center) ▶ Review lodging and hospitality options (hotels, number of rooms, conference space, etc.)
Incentives and Business Support	▶ Provide detailed breakdown of state and local government incentives offered in EOI, as well as any additional available incentives ○ Applicability to USDA ○ Estimated lifetime value / savings ○ Qualification process ○ Terms and conditions ▶ Support for employee and family relocation ○ Assess availability of employee relocation support incentives ○ Discuss employment programs / job placement for spouses and partners of relocated employees ○ Review housing, school, and dependent care options

Objectives and Discussion Points (cont'd)

2020-REE-03063-F

Category	Key Objectives / Discussion Points
Labor Market / Human Resources	▶ Labor market overview for the community (education levels, size of pool, competition, federal agencies, other characteristics) ○ Particular focus on job placement for spouses / partners of relocating employees ▶ Meet with HR / recruiting agency and review case studies of the agency's previous involvement with federal and / or agricultural resources (showing number of resources hired, types of job roles, key success factors, etc.) ○ Provide an overview of the recruiting process, timeline and associated costs in the local market (how are positions advertised, how are candidates sourced, pre-screened, assessed, interviewed, hired, etc.) ▶ Availability of specific resources / positions that the USDA anticipates to hire ○ Roles include ()
Residential Real Estate and Quality of Life	▶ Provide overview of local residential real estate market ○ Availability of housing, and potential effects of large influx of residents ○ Typical costs (lease and buy) ○ Neighborhoods and schools ○ Commuting options ▶ Discuss quality of life considerations ○ Cultural and recreational activities (parks, museums, sports, music, theater, food, shopping, zoos, agricultural events, etc.) ○ Community diversity (including discussion on faith-based / religious organizations) ○ Healthcare availability and cost (including diversity of specialty care, trauma centers, veterans' healthcare, VA hospitals) ○ Accessible transportation (trolleys, buses, light rail / trains, biking, walking) ○ Education (primary, secondary, continuing, special needs) ○ Crime and safety statistics

Objectives and Discussion Points (cont'd)

2020-REE-03063-F

Category	Key Objectives / Discussion Points
Commercial Real Estate Overview	▶ Provide overview of local commercial real estate market ○ Availability of Class A space ○ Market rates and economic trends ○ Commercial office hub locations, in relation to public transportation, local conveniences, major residential areas, CBDs, etc. ○ Leading area developers ○ Local construction / interior fit-out costs ○ Availability of temporary space ▶ Contextualize and assess sites proposed in EOIs relative to other available space in the MSA
Site Tours	▶ Provide an overview of each building including: ○ Tour of space on offer ○ Other tenants in the buildings ○ Building amenities (onsite medical facility, transportation for employees, fitness center, etc.) ○ Infrastructure and security ○ Physical access (major highways and rail networks) ○ Phases of development and future growth plans ○ Local climate conditions and seismic ratings ○ Codes and local regulations (green space, zoning / ordinances, production / occupancy permits, construction permits, fire, noise, emissions, etc.) ○ Location in relation to public transportation, local conveniences, major residential areas, CBDs, etc. ▶ Communications and IT infrastructure ○ Current infrastructure specs (Wi-Fi, video-conferencing, etc.) ○ Ability to comply with federal IT security requirements (existing capabilities, timeline and cost to enhance, etc.)

Illustrative Agenda

Durham-Chapel Hill, NC (5 sites)

Day 1

Day 2

Time	Meeting / Activity	Facilitator(s)	Location
7:30am-8:00am	Hotel breakfast (on an individual basis)	TBD	TBD
8:00am-8:45am	Internal team debrief	TBD	TBD
8:45am-9:00am	Travel to meet EOI Applicant(s) / EDC		
9:00am-10:30am	Community overview meeting with EOI applicants / EDC officials (including discussion on incentives / business support and demographic / quality of life statistics)	TBD	TBD
10:30am-11:30am	Labor market / human resources meeting with local HR consultant	TBD	TBD
11:30am-12:30pm	Residential real estate overview meeting (including discussion on local quality of life features)	TBD	TBD
12:30pm-1:00pm	Working lunch	N/A	TBD
1:00pm-2:00pm	Commercial real estate overview meeting	TBD	TBD

Ground
transportation

Illustrative Agenda (cont'd)

Durham-Chapel Hill, NC (5 sites)

Day 1

Day 2

Time	Meeting / Activity	Facilitator(s)	Location
2:00pm-2:30pm	Travel to Site Tour #1		
2:30pm-3:30pm	Site Tour #1	TBD	TBD
3:30pm-4:00pm	Travel to Site Tour #2		
4:00pm-5:00pm	Site Tour #2	TBD	TBD
5:00pm-5:30pm	Travel to hotel		
5:30pm-6:15pm	Internal team debrief	TBD	TBD

Ground
transportation

Illustrative Agenda (cont'd)

Durham-Chapel Hill, NC (5 sites)

Day 1

Day 2

Time	Meeting / Activity	Facilitator(s)	Location
7:30am-8:00am	Hotel breakfast (on an individual basis)	TBD	TBD
8:00am-8:30am	Internal team debrief	TBD	TBD
8:30am-9:00am	Travel to Site Tour #3		
9:00am-10:00am	Site Tour #3	TBD	TBD
10:00am-10:30am	Travel to Site Tour #4		
10:30-11:00am	Site Tour #4	TBD	TBD
11:00-11:30am	Travel to Site Tour #5		
11:30am-12:30pm	Site Tour #5	TBD	TBD
12:30pm-1:30pm	Travel to airport (with time to stop for lunch if possible)		
1:30pm	Departure		

Ground
transportation

-
- ▶ Space planning requirements
 - ▶ Fit-out standards
 - ▶ Building security
 - ▶ IT requirements
 - ▶ Secure and approved data labs to research (e.g., NASS, Census data labs)
 - ▶ Specific resources / positions that the USDA anticipates to hire in new location

I'm fine with it

From: Tkacz, Kailee - OSEC, Washington, DC
Sent: Monday, May 13, 2019 3:27 PM
To: Rodgers, Meghan - OC, Washington, DC <meghan.rodgers@usda.gov>
Cc: Varsamis, Alec - OC 20174, Washington, DC <alec.varsamis@usda.gov>; Rich, Michawn - OC, Washington, DC <michawn.rich@usda.gov>; Boswell, Kristi - OSEC, Washington, DC <kristi.boswell@usda.gov>; Knupp, Courtney - OSEC, Washington, DC <Courtney.Knupp@usda.gov>; Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>
Subject: FOR REVIEW: Info for Site Visits

Meghan:

Do you see any red flags with sharing the attached document with site locations we will be visiting for NIFA ERS site visits later this week?

(b)(5) DPP, (b)(5) A/C Privilege

From: Esch, Michele - ARS
Sent: Friday, May 10, 2019 6:16 PM
To: Young, Benjamin - OGC, Washington, DC <Benjamin.Young@usda.gov>; Bender, Stuart - OE, Washington, DC <stuart.bender@usda.gov>
Cc: Tkacz, Kailee - OSEC, Washington, DC <kailee.tkacz@usda.gov>; Boswell, Kristi - OSEC, Washington, DC <kristi.boswell@usda.gov>; Knupp, Courtney - OSEC, Washington, DC <Courtney.Knupp@usda.gov>
Subject: RE: FOUO/Deliberative - Comms info

Updated site visits overview document attached.

Stuart –please let us know if you have any concerns.

Michele

Michele Esch
Special Projects Coordinator
Executive Director, NAREEE Advisory Board
 U.S. Department of Agriculture
 (o) 202.720.8408
 (c) (b)(6)
michele.esch@ars.usda.gov

From: Young, Benjamin - OGC, Washington, DC
Sent: Friday, May 10, 2019 4:49 PM

To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>; Bender, Stuart - OE, Washington, DC <stuart.bender@usda.gov>

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Subject: RE: FOUO/Deliberative - Comms info



L. Benjamin "Benny" Young, Jr.
Associate General Counsel for General Law and
Research
Office of the General Counsel
U.S. Department of Agriculture
1400 Independence Ave S.W. Room 2033-S
Washington, DC 20250-1415
📞 202-720-5565 (Voice)
📱 (b)(6) (Mobile)
✉️ Benjamin.Young@usda.gov

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Benny and Stuart,

(b)(5) DPP, (b)(5) A/C Privilege

Thanks so much for your help!
Michele

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Waiting on list of names from EY but here is an update including info from Don (revised to fit with current language/purpose). Please comment and then let's get it cleared so we can get to EY.

(b)(6). I'll have my cell and plan to join the 3:30.

Thanks!
 Michele

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Cc: Knupp, Courtney - OSEC, Washington, DC <Courtney.Knupp@usda.gov>
Subject: RE: FOUO/Deliberative - Comms info

No additions outside of Kailee's thoughts.

Kristi J. Boswell
 Senior Advisor to the Secretary
 United States Department of Agriculture
 Office: 202.720.9990
 Cell: 202.281.5695

From: Tkacz, Kailee - OSEC, Washington, DC
Sent: Thursday, May 9, 2019 7:18 PM

To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>

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Deliberative/Predecisional

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Here are a few draft bullets to get us started on drafting something for EY to provide to the sites as it relates to press and high level interest in our visits. EY would provide the final to the EOIs as guidance on how to handle press inquiries. Hope this helps!

ERS/NIFA Relocation Site Visit Team

- Don Bice, **TITLE**, Departmental Administration, USDA
- Scott Hutchins, Deputy Under Secretary, Research, Education, and Economics, USDA
- Scott Angle, Director, National Institute of Food And Agriculture, USDA
- Chris Hartley, **TITLE**, Office of the Chief Economist, USDA
- Jay Variyam, **TITLE**, Economic Research Service, USDA
- Michele Esch, **TITLE**, USDA

- The USDA site visit team is visiting the top 3 MSAs identified in the short list in closed press sessions.

(b)(5) DPP

From: [Boswell, Kristi - OSEC, Washington, DC](#)
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Cc: [Tkacz, Kailee - OSEC, Washington, DC](#); [Knupp, Courtney - OSEC, Washington, DC](#)
Subject: RE: FOUO/Deliberative - Comms info
Date: Monday, May 13, 2019 3:44:50 PM
Attachments: [image001.png](#)

I am ok with this version.

Kristi J. Boswell

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(b)(5) DPP

Michele Esch

Executive Director

NAREEE Advisory Board

michele.esch@ars.usda.gov

(o) 202-720-8408

(m) (b)(6)

From: [Esch, Michele - ARS](#)
To: [Sanat Valecha](#)
Cc: [Catherine Von Seggern](#)
Subject: RE: Outstanding Site Visit Questions as of 5/15/19
Date: Wednesday, May 15, 2019 2:05:17 PM

Thank you! We have rented two cars (minivan or SUV size) so expect to have an additional 2-3 seats available in both cars. We will know more once we get on the ground and know exactly what kind of car we have.

Michele

Michele Esch

Special Projects Coordinator

Executive Director, NAREEE Advisory Board

U.S. Department of Agriculture

(o) 202.720.8408

(c) (b)(6)

michele.esch@ars.usda.gov

From: Sanat Valecha <(b)(6)@ey.com>
Sent: Wednesday, May 15, 2019 11:39 AM
To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>
Cc: Catherine Von Seggern <(b)(6)@ey.com>
Subject: RE: Outstanding Site Visit Questions as of 5/15/19

Hello Michele,

We received one additional question from North Carolina, asking how many vans you plan to rent:

- “We are coordinating lunch for the group, and will plan to have a representative from our team on the vehicles to address questions en route. Please let me know how many vehicles you expect the USDA will reserve, so we can assign our group accordingly.”

Thank you.

Regards,
 Sanat Valecha

Sanat Valecha | Senior | Advisory Services

Ernst & Young LLP

Office: (b)(6) | (b)(6)@ey.com

From: Sanat Valecha
Sent: Wednesday, May 15, 2019 10:35 AM
To: Esch, Michele - ARS <Michele.Esch@ARS.USDA.GOV>
Cc: Catherine Von Seggern <(b)(6)@ey.com>
Subject: Outstanding Site Visit Questions as of 5/15/19

Hello Michele,

I consolidated the outstanding questions asked by the short-listed EOIs below, including the questions shared yesterday in my email at 4:45pm EDT (Subject line – “RE: Digital Takeaway and Other Questions”).

Thank you.

Regards,
Sanat Valecha

Sanat Valecha | Senior | Advisory Services

Ernst & Young LLP

Office: (b)(6) | (b)(6)@ey.com

Outstanding Site Visit Questions as of 5/15/19

Wednesday, May 15, 2019
10:18 AM

Durham-Chapel Hill, NC

From Laura Lee (EDPNC) on 5/14/19:

“Our team is discussing utilizing an app for our additional information to support our visit. Would you be able to confirm whether the USDA group can download an app for such a purpose?”

From Laura Lee (EDPNC) on 5/15/19:

- “We are coordinating lunch for the group, and will plan to have a representative from our team on the vehicles to address questions en route. Please let me know how many vehicles you expect the USDA will reserve, so we can assign our group accordingly.”

Indianapolis / Lafayette, IN

1. What is the lunch per diem amount? What is the desired invoicing process?
2. How many vehicles will be utilized (needed for parking purposes)?
3. How many community/state attendees can ride in the USDA transportation? Community tours.
4. Please note, May 21 no open toe shoes will be allowed on the site
5. Please send any dietary needs for arranged lunches to be invoiced back for per diem.
6. Would the team like to meet on Monday evening for dinner (all purchase separately)
7. Can Local EDIT funds be used for Federal Government Entities?
8. Any guidance regarding how USDA structures leases as a tax exempt entity at other leases.

Does the whole building receive the exemption? And so they aren't eligible for any tax Abatements?

Kansas City, MO-KS

1. According to the building's broker (Bob Fagan, CBRE), the Thrive building (2555 Grand) now has 131,000 available SF, as 26,000 SF was vacated by Shook, Hardy, Bacon (a law firm that is scaling back their office space in favor of flex work options). Does the USDA still want to remove the Thrive site tour from the agenda? The EOI believes this building is one of the leading options, given its recent renovation and security measures.
2. Transportation - have you booked vans in KC? Can the EOI provide a staff member driver so that no time is wasted in driving around for parking? Or, do you intend to use the mini-coach suggested at Agenda USA?
3. Do you have a link to the GSA's Automated Advanced Acquisition Program to share at this stage?
4. Per the site visit guidelines, landlords should submit the letter of intent within 2 days of the site visit. Is that 2 days prior to the visit, or 2 days after the visit?

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City-level and Site-level Characteristics Important to Mission Critical ERS Operations and for Staff Retention and Recruitment

5/1/2019

City-level characteristics

- Within daily commute range of a Federal Statistical Data Research Center
- A city with other major economic and research institutes related to food, agriculture and public-policy making (e.g. a Federal Reserve bank, major research university, state capital)
- A diverse and tolerant city with a safe and welcoming environment for people of all colors, ethnicities, religions and sexual orientations. In a climate where people are becoming more willing to display their hatred and intolerance for anyone who is different from them, this is especially important.
- A wide-range of commutable employment opportunities for spouses and families, including multiple employment hubs, with multiple industries employing higher-skilled workers. As families have become accustomed to having unique employment opportunities that come with being in the Washington, DC area, and the possibility of one income being reduced, it's important to be able to ensure spousal and family employment to help cover that loss of income.
- A selection of high quality public school districts within a commutable distance. This is especially important for families with special needs children who will already be faced with the struggles of this relocation.

Site-specific characteristics

- Secure and approved data labs to support research (e.g. NASS, Census data labs)
- Wifi coverage throughout the building
- High-powered computers for users of large data sets
- Reliable video-conferencing from desks and all conference and meeting rooms
- Secure offices for staff with secure information
- Secure filing rooms/cabinets
- Offices for as many staff as possible
- Conference rooms of all sizes for internal and external meetings on par with what ERS currently has
- Small rooms for private conversations if not all staff have offices
- Showers/locker rooms for active commuters
- Kitchenettes/lunchrooms
- Safe neighborhood after hours
- Low noise levels (i.e. away from freeways and airports)
- Desirable residential neighborhood within a short commute of the site
- Multiple options for commuting (bike, walk, public transit, drive, shuttle service from nearest public transit)
- Secure, well-lit parking
- Secure bike-locking areas
- Walkable options for lunch
- Gym on site

- Outdoor and indoor spaces to quietly eat lunch
- Credit Union
- Cafeteria

From: [Hutchins, Scott - OSEC, Washington, DC](#)
To: [Leibtag, Ephraim - ERS](#); [Tkacz, Kailee - OSEC, Washington, DC](#); [Hartley, Chris - ERS](#)
Cc: [Knupp, Courtney - OSEC, Washington, DC](#)
Subject: Re: visits
Date: Thursday, May 9, 2019 8:24:00 AM
Attachments: [image002.png](#)

Great. Thanks!

From: "Leibtag, Ephraim - ERS" <ELEIBTAG@ers.usda.gov>
Date: Thursday, May 9, 2019 at 8:00:45 AM
To: "Tkacz, Kailee - OSEC, Washington, DC" <kailee.tkacz@usda.gov>, "Hutchins, Scott - OSEC, Washington, DC" <Scott.Hutchins@usda.gov>, "Hartley, Chris - ERS" <CHARTLEY@ERS.USDA.GOV>
Cc: "Knupp, Courtney - OSEC, Washington, DC" <Courtney.Knupp@usda.gov>
Subject: Re: visits

Scott and Kailee,

Jay is willing to represent ERS on the site visits.

I discussed with him this morning and he is set to take the ethics training today and Chris and I will brief him on the plans later today.

Thanks,

Ephraim

From: Tkacz, Kailee - OSEC, Washington, DC
Sent: Wednesday, May 8, 2019 9:50:26 PM
To: Hutchins, Scott - OSEC, Washington, DC; Leibtag, Ephraim - ERS; Hartley, Chris - ERS
Cc: Knupp, Courtney - OSEC, Washington, DC
Subject: RE: visits

All will confirm with this chain after I speak with Dep Sec in the AM once I confirm can Ephraim can you confirm Jay can join for the training tomorrow afternoon and you will be off the hook stay tuned!

From: Hutchins, Scott - OSEC, Washington, DC
Sent: Wednesday, May 8, 2019 5:56 PM

To: Leibtag, Ephraim - ERS <ELEIBTAG@ers.usda.gov>; Hartley, Chris - ERS
<CHARTLEY@ERS.USDA.GOV>

Cc: Tkacz, Kailee - OSEC, Washington, DC <kailee.tkacz@usda.gov>; Knupp, Courtney - OSEC,
Washington, DC <Courtney.Knupp@usda.gov>

Subject: RE: visits

Great choice ... thank you.



Scott H. Hutchins, Ph.D.

Deputy Under Secretary
Research, Education, and Economics
United States Department of Agriculture
Office: 202.720.1542

From: Leibtag, Ephraim - ERS

Sent: Wednesday, May 8,
2019 5:55 PM

To: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>; Hartley, Chris - ERS
<CHARTLEY@ERS.USDA.GOV>

Cc: Tkacz, Kailee - OSEC, Washington, DC <kailee.tkacz@usda.gov>; Knupp, Courtney - OSEC,
Washington, DC <Courtney.Knupp@usda.gov>

Subject: RE: visits

Scott,

Jay Variyam would be an excellent choice given his experience and position in the agency as well as the relocation issue (his willingness to do so).

I will talk to him first thing in the morning and follow up with Kailee and Courtney right away after that to ensure we get the training done tomorrow afternoon.

Ephraim

From: Hutchins, Scott - OSEC, Washington, DC

Sent: Wednesday, May 8, 2019 5:50 PM

To: Leibtag, Ephraim - ERS <ELEIBTAG@ers.usda.gov>; Hartley, Chris - ERS
<CHARTLEY@ERS.USDA.GOV>

Cc: Tkacz, Kailee - OSEC, Washington, DC <kailee.tkacz@usda.gov>; Knupp, Courtney - OSEC,
Washington, DC <Courtney.Knupp@usda.gov>

Subject: RE: visits

Ephraim,

I like (b)(5) DPP ... but there is a mandatory ethics briefing tomorrow for all site visit attendees, so get the name to Kailee/Courtney as soon as possible.



Scott H. Hutchins, Ph.D.

Deputy Under Secretary
Research, Education, and Economics
United States Department of Agriculture
Office: 202.720.1542

From: Hutchins, Scott -
OSEC, Washington, DC
Sent: Wednesday, May 8,

2019 5:39 PM

To: Leibtag, Ephraim - ERS <LEIBTAG@ers.usda.gov>; Hartley, Chris - ERS
<CHARTLEY@ERS.USDA.GOV>

Subject: RE: visits

Good plan ... any chance you have a Sr. Leader who would be relocating to address that angle too?



Scott H. Hutchins, Ph.D.

Deputy Under Secretary
Research, Education, and Economics
United States Department of Agriculture
Office: 202.720.1542

From: Leibtag, Ephraim - ERS
Sent: Wednesday, May 8,
2019 5:36 PM

To: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>; Hartley, Chris - ERS
<CHARTLEY@ERS.USDA.GOV>

Subject: Re: visits

Scott,

Chris and I have been the two people managing the drama up until this point and I would have concerns if both of us were to be away for multiple days at the same time given the current temperature here.

I have two other approaches for consideration:

1. (b)(5) DPP

(b)(5) DPP

2. Chris represent OCE and we send another ERS Senior Leader to represent ERS.

This would allow me to better ensure stability within the agency, while providing an opportunity for someone with long-term experience regarding the needs of ERS (as an agency to complete its mission) to gather information with the team on the site visits.

Happy to discuss whenever convenient.

Thanks,

Ephraim

(b)(6)

From: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>

Sent: Wednesday, May 8, 2019 5:09 PM

To: Leibtag, Ephraim - ERS; Hartley, Chris - ERS

Subject: FW: visits

I'm OK with this ... but (b)(5) DPP

.



Scott H. Hutchins, Ph.D.

Deputy Under Secretary
Research, Education, and Economics
United States Department of Agriculture
Office: 202.720.1542

From: Johansson, Robert - OCE

Sent: Wednesday, May 8, 2019 4:42 PM

To: Hutchins, Scott - OSEC, Washington, DC <Scott.Hutchins@usda.gov>; Boswell, Kristi - OSEC, Washington, DC <kristi.boswell@usda.gov>

Subject: visits

Hi Scott and Kristi,

(b)(5) DPP

If you are all good with that, then let's have that be the plan.

I don't need to go, and it may be difficult for me to get away anyways based on some separate issues.

Rob



Robert Johansson, Chief Economist
U.S. Department of Agriculture
Whitten Building, Room 112-A
Washington, DC 20250-3810
☎ 202-720-4164 & 202-720-5955
🌐 <https://www.usda.gov/OCE/>

ERS/NIFA Relocation Site Visit Team

US Department of Agriculture

- Scott Angle, Director, National Institute of Food and Agriculture
- Don Bice, Deputy Assistant Secretary for Administration
- Michele Esch, Special Projects Coordinator, Research, Education, and Economics
- Chris Hartley, Senior Advisor
- Scott Hutchins, Deputy Under Secretary, Research, Education, and Economics
- Jay Variyam, Division Director, Food Economics Division, Economic Research Service

General Services Administration

- Tiffany Simon, National Planning Manager

Ernst & Young

- Catherine Von Seggern, Executive Director, Construction and Real Estate Advisory Services, Ernst & Young
- Sanat Valecha, Senior, Advisory Services, Ernst & Young
- Incentives Representative, Ernst & Young (TBD)

Press Responses

- On May 3, the U.S. Department of Agriculture (USDA) [announced its top three finalists](#) for the relocations of the Economic Research Service (ERS) and National Institute of Food and Agriculture (NIFA).
- Leadership from USDA, GSA, as well as representatives from Ernst & Young will be attending all site visits.
- These visits to the top three finalists are part of a facts-based mission to better understand the unique attributes of each possible location and to obtain on site information on the community and quality of life, business support, the labor market, and infrastructure and commercial real estate opportunities being offered.
- All visits will be closed to the press as USDA will not be publicly commenting on possible locations or site visits until a final city selection is named.
- We request that representatives from each location do not invite press to events.
- We request that we be alerted ahead of time if there will be any city, state, or other government officials present on any part of the site visit.
- We also ask to be notified ahead of time if the city, state, or other affiliated organization will be making press statements about these site visits.
- These visits are part of a GSA competitive bidding process in the specific chosen locality. A representative from GSA is attending all aspects of the visits.
- USDA and the site selection contractor, Ernst & Young, are following strict guidelines and ethics rules throughout the site visits.

Incentives Plan During Site Visit

- USDA will not request anything from an EOI.
- The communities/economic development agencies/landlords will need to determine what they can offer.
- Landlords should be asked to make best offer and place in GSA's Automated Advanced Acquisition Program.
- For offers that can't be incorporated into landlord lease submission, USDA suggests that they submit a letter of intent from the community/economic development agency/organization.
- This letter of intent, if applicable, should be submitted within 2 days of the site visit.