VILLAGE OF INDIANTOWN
AGENDA
REGULAR VILLAGE COUNCIL MEETING

February 13, 2020
6:30 PM
at the Indiantown Civic Center, 15675 SW Osceola Street
Indiantown, FL 34956

VILLAGE COUNCIL
GUYTON STONE, MAYOR
JANET HERNÁNDEZ, VICE MAYOR
ANTHONY D. DOWLING
JACKIE GARY CLARKE
SUSAN GIBBS THOMAS

ADMINISTRATION
HOWARD W. BROWN JR., VILLAGE MANAGER
WADE C. VOSE, VILLAGE ATTORNEY
SUSAN A. OWENS, MPA, MMC, VILLAGE CLERK

Civility: Being "civil" is not a restraint on the First Amendment right to speak out, but it is more than just being polite. Civility is stating your opinions and beliefs, without degrading someone else in the process. Civility requires a person to respect other people's opinions and beliefs even if he or she strongly disagrees. It is finding a common ground for dialogue with others. It is being patient, graceful, and having a strong character. That's why we say "Character Counts" in Indiantown. Civility is practiced at all Village meetings.

Special Needs: If anyone attending this meeting requires a reasonable accommodation, please contact Susan Owens, Village Clerk, by telephone at (772) 597-8268 or by email at sowens@indiantownfl.gov at least 48 hours in advance.

Quasi-Judicial Hearings: Some of the matters on the Agenda may be "quasi-judicial" in nature. Village Council Members are required to disclose all ex-parte communications regarding these items and are subject to voir dire by any affected party regarding those communications. All witnesses testifying will be "sworn" prior to their testimony. However, the public is permitted to comment, without being sworn. Unsworn comment will be given its appropriate weight by the Village Council.

Appeal of Decision: If a person decides to appeal any decision made by the Village Council with
respect to any matter considered at this meeting, he or she will need a record of the proceeding, and for that purpose, may need to ensure that a verbatim record of the proceeding is made, which record includes any testimony and evidence upon which the appeal will be based.

Consent Agenda: Those matters included under the Consent Agenda are typically self-explanatory, non-controversial, and are not expected to require review or discussion. All items will be enacted by a single motion. If discussion on an item is desired, any Village Council Member, without a motion, may "pull" or remove the item to be considered separately. If any item is quasi-judicial, it may be removed from the Consent Agenda to be heard separately, by a Village Council Member, or by any member of the public desiring it to be heard, without a motion.

ROLL CALL

INVOCATION

PLEDGE OF ALLEGIANCE

PROCLAMATIONS, AWARDS AND SPECIAL PRESENTATIONS

1. Proclamation Designating February 22-29, 2020, as Future Farmers of America (FFA) Week

PUBLIC COMMENT

- The public is invited to comment for up to 3 minutes on any item not on the Agenda. Questions are typically deferred to staff, and if civility is not practiced, the Mayor may rule the person out of order, and may require the person be removed from the meeting.

COMMENTS BY VILLAGE COUNCIL MEMBERS

COMMITTEE REPORTS

COMMENTS BY VILLAGE MANAGER

APPROVAL OF AGENDA

CONSENT AGENDA

2. Minutes of the Special Meeting/Budget Hearing #2 of September 26, 2019

3. RESOLUTION NO. XXX-2020: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ADOPTING THE NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS); AND PROVIDING AN EFFECTIVE DATE

REGULAR AGENDA

4. RESOLUTION NO. XXX-2020: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, AMENDING THE RULES OF PROCEDURE FOR THE VILLAGE COUNCIL; AND PROVIDING AN EFFECTIVE DATE.

5. RFP# 001-2020-HB - Communication Consultant Services: Presentation by Quest Corporation of America & Selection of Communication Consultant Firm
6. RFP# 002-2020-HB - Lobbyist Services: Presentation by Short-Listed Firms & Selection of Lobbying Firm

7. Complete Count Committee Project and Budget Approval

8. **RESOLUTION NO. XXX-2020**: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ACCEPTING THE STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION PUBLIC TRANSPORTATION GRANT AGREEMENT (FINANCIAL PROJECT NO. (446657–1–84-01) TO PROVIDE FUNDING ASSISTANCE TO THE VILLAGE OF INDIANTOWN FOR PUBLIC TRANSPORTATION OPERATING SERVICES; AUTHORIZING THE MAYOR TO EXECUTE THE AGREEMENT; FURTHER AUTHORIZING THE VILLAGE ATTORNEY TO EXECUTE THE AGREEMENT BY APPROVING IT AS TO FORM AND CORRECTNESS; AND PROVIDING AN EFFECTIVE DATE.


10. Approval of Center for Public Safety Management (CPSM) Proposal for Comprehensive Analysis of Fire/EMS Services

11. Indiantown Trust Fund Board Appointment(s) and Designation of a Board Chairperson

12. Community Development Block Grant (CDBG) Citizen Advisory Task Force (CATF) Member Appointment

**FIRST READING ORDINANCES**

**SECOND READING ORDINANCES**

**DISCUSSION ITEMS**


14. Florida Inland Navigation Water District (FIND) Waterways Assistance Funding

**ANNOUNCEMENTS**

**NEXT REGULAR MEETING**

**ADJOURNMENT**
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Proclamation Designating February 22-29, 2020, as Future Farmers of America (FFA) Week

SUMMARY OF ITEM:

RECOMMENDATION:

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk

DATE: 2/5/2020

ATTACHMENTS:
Description
FFA Week Proclamation
WHEREAS, FFA and agricultural education provide a strong foundation for the youth of America and the future of food, fiber and natural resources systems; and

WHEREAS, FFA promotes premier leadership, personal growth and career success among its members; and

WHEREAS, agricultural education and FFA ensure a steady supply of young professionals to meet the growing needs in the science, business and technology of agriculture; and

WHEREAS, the FFA motto — “Learning to Do, Doing to Learn, Earning to Live, Living to Serve” — gives direction and purpose to these students who take an active role in succeeding in agricultural education; and

WHEREAS, FFA promotes citizenship, volunteerism, patriotism and cooperation.

NOW, THEREFORE, I, Guyton Stone, Mayor of the Village of Indiantown, Florida do hereby proclaim February 22-29, 2020, as FAA week in the Village of Indiantown, Florida, and encourage all residents to join me and the Village Council in this celebration.

IN WITNESS WHEREOF, I have hereunto set my hand and caused the seal of the Village of Indiantown, Florida to be affixed this 13th day of February 2020.

ATTEST:

__________________________________  ________________________________
Susan A. Owens, MPA, MMC       Guyton Stone
Village Clerk                  Mayor
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Minutes of the Special Meeting/Budget Hearing #2 of September 26, 2019

SUMMARY OF ITEM:

RECOMMENDATION: Staff recommends approval of these minutes.

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk DATE: 2/6/2020

ATTACHMENTS:
Description
Minutes of the Special Meeting/Budget Hearing #2 of September 26, 2019
VILLAGE OF INDIANTOWN
SPECIAL VILLAGE COUNCIL MEETING MINUTES
September 26, 2019
6:00 PM

INDIANTOWN CIVIC CENTER
15675 SW Osceola Street, Indiantown, FL 34956

CALL TO ORDER: 6:02 p.m.

ROLL CALL: Susan A. Owens, Village Clerk

PRESENT: Mayor Stone, Vice Mayor Hernández, Council Member Clarke, Council Member Dowling and Council Member Gibbs Thomas (arrived at 6:07 p.m.). Staff: Village Manager Howard W. Brown, Jr., Village Attorney Wade C. Vose, and Village Clerk Susan A. Owens.

INVOCATION: Council Member Dowling gave the Invocation.

PLEDGE OF ALLEGIANCE: Mayor Stone led the Pledge of Allegiance.

PROCLAMATIONS, AWARDS AND SPECIAL PRESENTATIONS – None

PUBLIC COMMENT – None

COMMENTS BY VILLAGE COUNCIL MEMBERS – None

COMMITTEE REPORTS – None

COMMENTS BY VILLAGE MANAGER – None

APPROVAL OF AGENDA:

Motion was made to approve the agenda by Council Member Clarke. Motion was duly seconded by Vice Mayor Hernández and approved 4-0, with Council Member Gibbs Thomas absent.

CONSENT AGENDA – None
REGULAR AGENDA:

1. **RESOLUTION NO. 032-2019**: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ADOPTING A FINAL MILLAGE RATE FOR THE LEVY OF AD VALOREM TAXATION FOR FISCAL YEAR 2019-2020; AND PROVIDING FOR AN EFFECTIVE DATE.

   Mayor Stone announced that this is the second of two public hearings required by Florida Law for the adoption of a millage rate for Fiscal Year 2020.

   Motion was made to approve Resolution No. 032-2019 by Council Member Hernández. Motion was duly seconded by Council Member Dowling.

   Manager Brown thanked the Village Council for its guidance and leadership during the Fiscal Year 2020 budget development process and presented the Fiscal Year 2020 tentative millage rate. He stated that, for Fiscal Year 2020, the Village of Indiantown is considering levying a 1.6304 mill which is 67.72% below the rolled-back rate of 5.0512 mills. At 95% collection, the proposed millage rate will generate about $4.9 million. He added that property tax revenue makes up about approximately 62.7% of the General Fund budget.

   Mayor Stone announced that this meeting was advertised as a public hearing and called for public comment.

   Following a question from the public, Village Manager Brown explained the difference between Fiscal Year 2019’s millage rate and the proposed rate for Fiscal Year 2020.

   Seeing there were no further comments from the public, Mayor Stone closed the public hearing portion of the item.

   *Clerk’s Note: Council Member Gibbs Thomas arrived at 6:07 p.m.*

   Council Member Gibbs Thomas highlighted the fact that the Village did not raise its own taxes. She stated that residents may see an increase in their taxes, but that it would be due to other taxing authorities raising their portion of the tax bill.

   **On call for the vote, Resolution No. 032-2019 was approved unanimously.**

2. **RESOLUTION NO. 033-2019**: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ADOPTING A FINAL BUDGET RATE FOR FISCAL YEAR 2019-2020; AND PROVIDING FOR AN EFFECTIVE DATE.

   Mayor Stone stated that this is the second of two public hearings required by Florida Law for the adoption of an annual budget for Fiscal Year 2020.
Motion was made to approve Resolution No. 033-2019 by Council Member Gibbs Thomas. Motion was duly seconded by Council Member Clarke.

Manager Brown provided a presentation on the proposed Fiscal Year 2020 Budget. He again thanked the Mayor and Council for their leadership on this matter and guidance throughout the Fiscal Year 2020 budget development process. He spoke regarding the number of budget workshops that had been held prior to this hearing. He stated that the Fiscal Year 2020 tentative budget includes a decrease of 2.6319 mills to the millage rate of 1.6304, the proposed millage rate is approximately a 67% decrease below the rolled-back rate of 5.0512 and the Fiscal Year 2020 tentative budget is $4,946,167.00. He further stated that this is a decrease of $6,634,629.00 or about 57.3% from the Fiscal Year 2019 amended budget of $11,580,796.00. He noted that the Fiscal Year 2020 budget is balanced and that all efforts have been made to conduct a thorough analysis of the Village’s financials and anticipated revenues and expenditures. He then provided an overview of the Fiscal Year 2020 budget highlights and spoke regarding the pending legislative funding request made to the State for the Booker Park Drainage and Roadway Project, the County transferring three of their parks to the Village and the Village transmitting its Comprehensive Plan to the State. He stated that the Village will be looking at the following items for Fiscal Year 2020: impact fee reduction and a feasibility study regarding Fire/EMS Services.

Mayor Stone announced that this meeting was advertised as a public hearing and asked for any public comment.

Seeing there were no comments from the public, Mayor Stone closed the public hearing portion of the item and called for the vote.

**On call for the vote, Resolution No. 033-2019 was approved unanimously.**

**FIRST READING ORDINANCES** – None

**SECOND READING ORDINANCES** – None

**DISCUSSION ITEMS** – None

**NEXT REGULAR MEETING:** September 26, 2019, at 6:30 p.m.

**ADJOURNMENT:** 6:20 p.m.

**ATTEST:**

SUSAN A. OWENS, MPA, MMC  
VILLAGE CLERK

GUYTON STONE,  
MAYOR

**DATE**

Minutes of the Special Meeting of September 26, 2019
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: RESOLUTION NO. XXX-2020: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ADOPTING THE NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS); AND PROVIDING AN EFFECTIVE DATE

SUMMARY OF ITEM: In Homeland Security Directive (HSPD)-5, the President directed the Secretary of the Department of Homeland Security to develop and administer a National Incident Management System (NIMS), which would provide a consistent nationwide approach for Federal, State, Local and tribal governments to work together more effectively and efficiently to prevent, prepare for, respond to, and recover from domestic incidents, regardless of cause, size or complexity.

The NIMS provides for interoperability and compatibility among Federal, State and local capabilities and includes a core set of concepts, principles, terminology and technologies covering the incident command system, unified command, training, management of resources and reporting.

Failure to adopt NIMS as the requisite emergency management system may preclude reimbursement to the Village for costs expended during and after a declared emergency or disaster and for training and preparation for such disasters or emergencies.

RECOMMENDATION: Staff recommends approval of this resolution.

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk

DATE: 2/5/2020

ATTACHMENTS:

Description
Resolution No. XXX-2020
VILLAGE OF INDIANTOWN, FLORIDA

RESOLUTION NO. XXX-2020

A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ADOPTING THE NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS); AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, in Homeland Security Directive (HSPD)-5, the President directed the Secretary of the Department of Homeland Security to develop and administer a National Incident Management System (NIMS), which would provide a consistent nationwide approach for Federal, State, Local and tribal governments to work together more effectively and efficiently to prevent, prepare for, respond to, and recover from domestic incidents, regardless of cause, size or complexity; and

WHEREAS, the NIMS provides for interoperability and compatibility among Federal, State and local capabilities and includes a core set of concepts, principles, terminology and technologies covering the incident command system, unified command, training, management of resources and reporting; and

WHEREAS, failure to adopt NIMS as the requisite emergency management system may preclude reimbursement to the political subdivision for costs expended during and after a declared emergency or disaster and for training and preparation for such disasters or emergencies; and.

NOW, THEREFORE BE IT RESOLVED, by the Village Council of the Village of Indiantown, Florida, as follows:

SECTION 1. NIMS ADOPTION. The Village of Indiantown hereby adopts the National Incident Management System (NIMS) and recommends that all public safety agencies, emergency responders, hazardous materials users and transporters, hospitals and school districts situated within the municipality do the same.

SECTION 2. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.
ADOPTED this 13th day of February, 2020.

ATTEST: 

VILLAGE OF INDIANTOWN, FLORIDA

_____________________________   _____________________________
SUSAN A. OWENS, MPA, MMC   GUYTON STONE
VILLAGE CLERK   MAYOR

REVIEWED FOR FORM AND CORRECTNESS:

_____________________________
WADE C. VOSE
VILLAGE ATTORNEY
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: **RESOLUTION NO. XXX-2020**: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, AMENDING THE RULES OF PROCEDURE FOR THE VILLAGE COUNCIL; AND PROVIDING AN EFFECTIVE DATE.

SUMMARY OF ITEM: At the February 1, 2020, Council Retreat, the Council discussed amending their order of business for regular meeting agendas by moving Council Comments, Committee Reports and Comments from the Manager closer to the end of the agenda. This resolution serves to affect those amendments and to formally adopt other minor changes made since the rules of procedure were last amended.

RECOMMENDATION: Staff recommends that the Council discuss these amendments and determine if any further amendments are necessary.

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk

DATE: 2/6/2020

ATTACHMENTS:
Description
Resolution No. XXX-2020
WHEREAS, on March 21, 2018, the Village Council approved Resolution No. 002-2018, establishing rules of procedure for the Village Council, including the order of business for regular meeting agendas; and

WHEREAS, on August 23, 2018, the Village Council approved Resolution No. 038-2018, amending and re-adopting the rules of procedure for the Village Council to relocate “Public Comment” within the order of business for regular meeting agendas; and

WHEREAS, on January 10, 2019, the Village Council approved Resolution No. 004-2019, amending the rules of procedure for the Village Council to add Village Council Committee Reports to the order of business for regular meeting agendas; and

WHEREAS, the Village Council finds it in the best interest of the Village to further amend the previously approved order of business for regular meeting agendas.

NOW, THEREFORE BE IT RESOLVED, by the Village Council of the Village of Indiantown, Florida, as follows:

SECTION 1. RULES OF PROCEDURE; AMENDED. The following amendments to the order of business are hereby adopted for regular meeting agendas:

Section 2. AGENDAS.
(b) Regular meeting agendas...
(3). All items on the regular meeting agenda shall be placed under the following headings in the sequence shown:

- Call to Order
- Invocation
- Pledge of Allegiance
Resolution No. XXX-2020 – Amending Rules of Procedure, Order of Business

- Proclamations
- Presentations
- Proclamations, Awards and Special Presentations
- Comments by Village Council Members
- Village Council Committee Reports
- Comments by the Village Manager
- Public Comment Comments by the Public on Non-Agenda Items (3 minutes each)
- Approval of the Agenda
- Consent Calendar Agenda
- Quasi-Judicial Hearings (items may also be under ordinances or resolutions, as appropriate)
- Regular Agenda
- First Reading of Ordinances
- Second Reading of Ordinances
- Resolutions
- Motions
- Discussion and Deliberation Items
- Comments by Village Council Members
- Committee Reports
- Comments by Village Manager
- Announcements
- Announce Next Regular Village Council Meeting (Announce Time, Date & Location)
- Adjournment

SECTION 2. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

ADOPTED this 13th day of February, 2020.
ATTEST: 

SUSAN A. OWENS, MPA, MMC
VILLAGE CLERK

GUYTON STONE
MAYOR

VILLAGE OF INDIANTOWN, FLORIDA

REVIEWED FOR FORM AND CORRECTNESS:

WADE C. VOSE
VILLAGE ATTORNEY
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: RFP# 001-2020-HB - Communication Consultant Services:
Presentation by Quest Corporation of America & Selection of Communication Consultant Firm

SUMMARY OF ITEM: On January 3, 2020, the Village issued Request for Proposals (RFP) #001-2020-HB for a Communications Consultant. The Village received three proposals in response to said RFP.

The Selection Committee members reviewed each of the three proposals in detail and met on January 29, 2020, to discuss and rank the proposals. Below is the final ranking of the proposals:

1. Quest Corporation of America - 187 points
2. Firefly Group - 156 points
3. Upstairs Communications - 110 points

As the Selection Committee's top-ranked firm, Quest Corporation of America will be making a brief presentation to the Village Council and will answer any questions regarding the provision of their services.

RECOMMENDATION: Staff recommends that the Village Council approve the Selection Committee's recommendation of Quest Corporation of America and authorize the Village Manager and/or Village Attorney to enter into negotiations with said firm.

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk DATE: 2/4/2020

ATTACHMENTS:
Description
Quest Corporation of America's Proposal
Firefly Group's Proposal
Upstairs Communication's Proposal
REQUEST FOR PROPOSAL

INDIANTOWN COMMUNICATIONS
CONSULTING SERVICES
RFP No. #2020-001-HB,

Submitted by: Quest Corporation of America, Inc.  
Corporate: 17220 Camelot Court  
            Land O’ Lakes, FL 34638

Due: January 27, 2020
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Executive Summary

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Tab 1: EXECUTIVE SUMMARY

Quest Corporation of America, Inc. is a full-service communications firm that provides superior services to municipal, county, state and regional governments throughout Florida. Quest was founded in 1995 and we are proudly celebrating our 25th Anniversary this year. Quest is a DBE/WBE/MBE Florida certified woman-owned company that has worked side by side with our clients to provide communications, creative design, website development, social media services, marketing and other services. Our team of approximately 75 employees brings a depth of experience and resources to our contracts. Headquartered in Land O’ Lakes, we have Quest team members working and living locally in the Treasure Coast. Our current list of local clients includes:

- Martin MPO
- City of Port St. Lucie
- City of Coral Springs
- City of Doral
- City of Dania Beach
- Dania Beach Community Redevelopment Agency
- City of Fort Lauderdale
- City of Weston
- Broward MPO
- Florida Department of Transportation

Quest performs all of the items detailed in the scope of services in house. We will work as an extension of your team to support with communication efforts, social media, monitoring trends, spotlighting the Village, updating residents, preparing press releases, engaging your audience, community events, creative services, trainings, website and presentations. Our local team is a great fit for the Village and is readily available to support your efforts. Our team includes trained government communicators with the unique understanding of the challenges presented by shrinking budgets, growing demands and changes in the way the public communicates.

The proposed team for this project includes:

**Peter F. Dobens, Project Manager**
Mr. Dobens brings more than 40 years’ experience to the team as a government communications executive, an award-winning television newsroom manager and award-winning newspaper reporter/photographer/editor. Mr. Dobens’ background includes 14 years as the news assignment editor/managing editor for WPBF-TV, Channel 25 in West Palm Beach. Mr. Dobens created the Communications Office for the City of Hallandale Beach, including redesigning their quarterly news publications, website and redeveloped HBTV, the City of Hallandale Beach Government television station. He also rebuilt the City’s emergency radio station. Mr. Dobens is a former Martin County resident.

**Nannette Rodriguez, Social Media and Crisis Communications**
Ms. Rodriguez has more than 30 years’ experience, including more than 20 years as the Communications Manager for the City of Miami Beach. This included developing the City’s website and the city social media communications programs and protocols. A skilled bi-lingual crisis manager, Ms. Rodriguez guided the city’s administration through the Gianni Versace murder case and several hurricanes. She also is former Communications Manager for the Palm Beach County Clerk & Comptroller’s office, and is outgoing president of 3CMA, the City-County Communications & Marketing Association. She also is currently serving as communications consultant to the City of Dania Beach and the City of Weston.

**Beth Zsoka, Quality Control**
Ms. Zsoka is a skilled manager and quality control expert with more than 12 years’ experience in communications management and administration. She is the Business Unit Manager for Southeast Florida the Treasure Coast. With an in-depth knowledge of government relations, she excels in public
engagement/information, market research, consensus-building and community outreach. Ms. Zsoka is skilled at identifying potential issues and working with her clients to find workable solutions. She has strong writing, event planning and communication skills. Her background includes developing and implementing effective promotional campaigns, surveys, communicating and educating the public about project concerns, forming and managing effective working groups and task teams, and hosting successful events, meetings and workshops. Ms. Zsoka has worked on several projects in Martin County including the Veterans Memorial Bridge. She worked closely with the community and the chambers of commerce throughout the project.

Our key team players are supported by creative service professionals producing high level multimedia platforms with animations, presentations, website development, videos and visually impactful public service announcements. Our deliverables include eye-catching print advertisements, fact sheets, public meeting notices, commercials, radio advertisements, newsletters and more. Our deliverables are tailored to reach target audiences and specific groups proactively and effectively.
SAMPLING OF QUEST SERVICES

Administrative
Advertising Campaigns
Agency Advocacy
Annual Reports
Bilingual/Translation Services
Brand Identity/Brand Strategy
Brochures/Fliers
Community Sponsorship Programs
Community Outreach
Community Working Groups
Communication Plans
Consensus Building
Copywriting
Creative Services
Crisis Communications
Customer Appreciation/Employee Appreciation
Database Management
Direct Mail Campaigns
Economic Impact Brochures and Surveys

Focus Groups
Gamification Techniques
Graphic Design
Image Campaigns
Intergovernmental/Community Relations
Incentive Promotions
Issue Resolution and Documentation
Logo Development
Market Research
Marketing Campaigns/Marketing Plans
Master Plan Update Reports
Media Relations
Meeting Facilitation
News Releases
Newsletters
Photography
Presentation Development/Speech Writing
Program Management
Public Education Campaigns

Public Hearings
Public Involvement/Community Outreach
Public Involvement Plans
Public Meetings/Workshops/Charrettes/Hearings
Public Relations
Rebranding Strategy
Research and Analysis
Social Media Positioning/Management
Special Events
Stakeholder Workshops and Events
Surveys – In Person and Online
Twenty-Four Hour Hotlines/Call Centers
Video Production
Voiceover
Website Design/Content Support/Content Management
Workforce Development/Recruitment and Training
A. **Company and General Information**
   1. Quest Corporation of America, Inc.
      17220 Camelot Court
      Land O’Lakes, FL 34638
      866-662-6273
      www.QCAusa.com
   2. Letter of Transmittal (included in attachments)
   3. Jessica Francois
      Vice President/Owner
      866-662-6273
      Jessica.Francois@QCAusa.com

B. **Qualifications and Experience of the Firm**
   1. Quest Corporation of America, Inc. (Quest) was founded in 1995 as an S-Corporation by Sharlene Lairscey. Celebrating 25 years, the company is now owned and operated by Sharlene Francois Lairscey and her daughter Jessica Francois. Sharlene serves as president/CEO and sole director for the organization. Jessica is a vice president, and corporate officer serving as well as secretary/treasurer for Quest. Long-time friend and professional colleague Diane Hackney is also authorized as a corporate officer responsible for contract negotiations. Diane Hackney serves as an Assistant Vice President/Corporate Officer. We have an executive leadership team comprised of additional members responsible for innovation, quality, training and customer relations. Quest is a state-certified DBE/WBE/MBE woman-owned business with a reputation for producing high quality, professional services. We have 75 employees located throughout the state of Florida. Southeast Florida has a Business Unit Manager, Beth Zsoka, reporting directly to the executive team. We have team members living and working throughout South Florida including in the Treasure Coast. Our closest physical offices are located in Orlando and Miami. In some cases our team works from client offices locally. Our organization is structured to strategically serve clients throughout Florida and still be a company that represents our vision, mission and core values. Our organization structure is included:
2. At Quest, we’ve maintained a reputation for providing high-quality, professional creative products and communications services to educational and various state departments, federal and municipal agencies, and to some of the largest engineering and construction companies throughout the United States. Our primary business is marketing and communications. Quest can complete all anticipated scope of services in-house.

3. Our Southeast Florida team will have primary responsibility for managing the account. Our corporate office will provide the necessary support needed including creative, website and any additional resources or support needed.
Jessica Francois will oversee contract; ensure customer satisfaction through follow-up; provide expert input; ensure support and resources for our teams.

Beth Zsoka will oversee the team providing quality control expertise on all deliverables and content for the lifetime of the contract.

Peter F. Dobens will serve as the daily point of contact for the Village. He will lead the project efforts including meeting with the Village on a regular basis in person or by phone; brainstorming opportunities to spotlight the Village and update the public; tracking media; creating content for newsletters, press releases and social media; monitoring and reporting communication efforts; developing a communications plan and timeline; facilitating meetings and events; handling community outreach to agencies and organizations that serve Indiantown residents; monitoring and managing social media platforms; responding to and tracking resident inquires; providing recommendations for the Village’s website; training Village staff; providing strategic outreach plan and marketing. He is dedicated to this project and will be available to the Village and residents 24 hours a day.

Nannette Rodriguez will support the Project Manager and the Village. She is a nationally recognized expert in social media, providing seminars nationally for government public relations/communications managers through the 3CMA, City-County Communications & Marketing Association. A bilingual member of the team, she established the social media program for the City of Miami Beach. She is currently managing the social media and public relations for the City of Weston. During her tenure as Communications Manager for the City of Miami Beach and Palm Beach County Clerk & Comptroller’s office she developed the crisis communications plans.

Additional Support Services, as needed:

Chip Boeckh will work closely with the Project Manager and the Village to creative and produce visually impactful and eye-catching deliverables. His support includes product layout and print production.

Tomás Monzón oversees the video production team. He can support the Village with short and meaningful videos to help inform and spotlight the Village, as needed.

Dylan Conway leads our South Florida technology team. He supports the team in creating and maintaining websites. He works to ensure websites are functional, meeting ADA requirements and are user friendly.

4. Our team stands ready to support the Village as much as needed. We anticipate 10 hours a week based on the services outlined in the scope. Quest only bills the actual hours we work. We will provide monthly reports on activities and hours used. We propose a flat rate of $90.00 an hour for all services and team members. Our team is available to support more than 10 hours a week as identified, needed and approved by the Village.

5. Our firm has extensive experience conducting the services requested. We have been serving clients in this capacity since 1995. Over the past five years, the Southeast Florida Quest team members proposed on this project have managed communications and/or provided social media content, produced news releases and eblast newsletters or content for:
   • City of Weston, FL
   • City of Post St. Lucie, FL
   • City of Coral Springs, FL
   • City of Dania Beach, FL
   • Martin MPO, Stuart, FL
   • Palm Beach County Clerk & Comptroller’s Office
   • City of Hallandale Beach, FL
Quest currently has 166 active contracts and 85 active clients. The scopes of services include community outreach, public information/involvement, marketing, administration and creative services.

6. At Quest our people are what makes the difference. **Why Quest?**
   - Reputation for producing high quality, professional services
   - Client focused, excellent customer service
   - Work responsibly and ethically
   - Hand selected local team has extensive experience in supporting agencies with communications
   - Our teams follow the latest trend, technologies and best practices
   - 70+ communications and support professionals
   - Experienced in-house, full service creative services
   - Strong local knowledge and established relationships
   - We value fairness, honesty, integrity and transparency
   - Experience working with Florida’s Sunshine Law and public records laws.
   - Monitor our results and meet with clients regularly
   - Experience leveraging small budgets

C. **Qualifications and Experience of Proposed Project Team**

1. Peter F. Dobens serves Quest as a Senior Communications Manager. Mr. Dobens is a seasoned communications expert with more than 40 years’ experience in government communications, media relations and the news media. He brings government experience with the City of Hallandale Beach, Boca Raton Airport Authority, Martin MPO and City of Coral Springs. He created the office of communications and public information for the City of Hallandale Beach, FL. His duties included media briefings, news releases, on-camera interviews, coaching city leaders on how to deal with the media. He created the City’s social media platforms and established the city/employee protocols. Utilizing Facebook Live, he brought city events into the mobile devices or city residents. He ensured that all city photographs posted to social media included a city logo to ensure the municipality received credit for any “shares” or if the photo was reproduced. During his time with the City of Hallandale Beach, he published and redesigned the City’s quarterly newsletter, which was electronically distributed to all residents. Mr. Dobens is the project manager for the Martin MPO 2045 Long Range Transportation Plan (LRTP) which is currently underway. The project includes communications, community outreach, website development, video production and tracking all calls and comments about the project. As project manager, he is completing work on the Boca Raton Airport Authority website compliance program. The project included reviewing the website to bring it into ADA (Americans with Disabilities Act) and WCAG (Web Content Accessibility Guidelines) compatibility. Also, he provided social media, news releases and collaterals for several City of Coral Springs projects.

2. Nannette Rodriguez serves Quest as a Senior Communications Manager. She has over 30 years of nationally recognized internal and external government and public-sector public relations and marketing experience. She successfully leads and executes communications strategy across diverse platforms and tactics. Her vast experience has developed her into an expert in media relations, social media, crisis communications, digital media, publishing, multi-platform copywriting/editing, branding, reputation management, advertising/marketing, community relations and outreach, government affairs, special events, and video production. She has established relationships with media representatives. She is also experienced in multiple crisis scenarios from natural to criminal to economic and currently lectures and provides training on such matters. She has served in many leaderships roles throughout her career including immediate past-president of 3CMA. In 2017, she was honored as Communicator of the Year by public sector communicators nationally. From 2016 to 2018, she served as the Communications Manager for the Palm Beach County Clerk & Comptroller’s Office where she upgraded the social media platforms and followers by more than 300 percent. Currently, she is providing news and social media support to the City of Weston, City of Dania Beach, Danie Beach Community Redevelopment Agency, Martin MPO, Broward MPO
and FDOT. The outgoing president of 3CMA, the City-County Communications and Marketing Association, Ms. Rodriguez teaches social media to government communicators around the country. She is FEMA and NIMS certified.

3. Beth Zsoka serves Quest as the Business Unit Leader for Southeast Florida covering the Treasure Coast, Palm Beach and Broward Counties. Ms. Zsoka has over 12 years serving as a public relations and communications professional for public-sector clients on a myriad of projects. As a Business Unit Leader for Quest, Ms. Zsoka is responsible for client relations, project management, managing contracts and staff, product and project delivery and Quality Assurance/Quality Control. She manages community outreach, special projects and assignments, handles crisis management and serves as an advisor and Quality Control for communication professionals. She has thorough knowledge and understanding of Florida’s Sunshine Law and works to complete all contracts and assignments successfully, on time and within budget. For the last three years, Ms. Zsoka has been supporting the City of Port St. Lucie in spotlighting their design/build LAP bridge construction project. She worked closely with the City in creating a project specific website and updating that website (www.crosstownextension.com). She distributes information via social media, door to door, press releases, signage and more. Ms. Zsoka facilitates and attends special events on behalf of the City.

4. Chip Boeckh serves Quest Creative Services Manager. He is a veteran graphic design professional with more than two decades as an art designer creating eye-catching collaterals, fliers, brochures, newsletters, websites, logos and programs. As a senior graphics designer, he oversees all aspects of production to deliver an engaging high-quality product to our clients. Mr. Boeckh and his team developed the logo, website and feel for the multi-faceted City of Gainesville Trans4ming East GNV project. A sought-after design team, Mr. Boeckh’s team updated graphics for the Manatee County Area Transit system and continues to maintain the branding, messaging and marketing for the Goldsboro-Wayne Transportation Authority in North Carolina.

5. Dylan Conway serves as Quest Webmaster. He has more than 18 years’ experience in information technology and website services. He will review, make suggestions and provide updates to the Village website, including reviewing the website for ADA and WCAG compliance. Mr. Conway is certified by the Florida Department of Transportation to update the state website for projects in District Four. He developed the Martin MPO 2045 Long Range Transportation Plan website, (www.MartininMotion.com) adding a video component to the home page to highlight Martin County, and included an interactive map. He recently completed a review of the Boca Raton Airport Authority (www.bocaairport.com) to bring the website into ADA and WCAG compliance. He also maintains and updates the City of Port St. Lucie Crosstown Parkway Extension website, (www.crosstownextension.com).

6. Tomás Monzón serves as Quest Video Services. Our video team, under the direction of Mr. Monzón, stands ready to support the Village if needed and approved. He is a skilled cameraman with the latest Sony equipment. Mr. Monzón has been producing high-quality videos for the Florida Department of Transportation on several projects. He oversees a video team that includes an FAA-licensed drone operator.

Resumes for our hand selected key team members are included.
Beth Zsoka
Quality Control

Experience – 12 Years
Beth Zsoka is an experienced public relations and communications professional who serves a variety of public-sector clients on a myriad of public relations and community outreach projects throughout Florida. With an in-depth knowledge of municipal government and the transportation industry, she excels in communications, media relations, market research, consensus building and community outreach. Ms. Zsoka is skilled at identifying potential issues and working with her clients to find workable solutions. Her background includes developing and implementing effective surveys; identifying marketing opportunities for clients; and hosting successful events, meetings and workshops.

As a Business Unit Leader for Quest, Ms. Zsoka is responsible for client relations, project management, managing contracts and staff, product and project delivery and Quality Assurance/Quality Control. A Southeast Florida resident, she has served on several municipal projects in the area from transit and aviation to traditional road and bridge projects and has established strong working relationships with local officials, civic organizations, media and community members. She manages community outreach, special projects and assignments, handles crisis management and serves as an advisor and Quality Control for communication professionals.

RELEVANT PROJECT EXPERIENCE
City of Port St. Lucie, Crosstown Parkway, Project Communications Manager
Port St. Lucie, FL (2014 – Present)
Ms. Zsoka serves as the project communications and information officer for the City’s Crosstown Parkway Extension Design/Build Project. She manages media relations, project branding, maintains a 24-hour hotline, plans and hosts public meetings and project familiarization tours with local community officials and community groups. Ms. Zsoka handles community education and provides updates to the City Council. Also, she develops and manages social media content and produces timely project video updates for this multi-million-dollar municipal bridge project crossing over the North Fork of the St. Lucie River in the City of Port St. Lucie. She attends and presents at several City events and helped facilitate the Grand Opening for thousands of residents and dignitaries.

Florida Department of Transportation, District Four, Veterans Memorial Bridge – Communications, Public Involvement/Outreach
Stuart, FL (2010 – 2016)
Ms. Zsoka was the lead communications and public involvement officer for this design-build project spanning the South Fork of the St. Lucie River from Palm City to just south of Stuart in Martin County. The project required extensive community outreach and coordination between FDOT, Martin County, the business community and key stakeholders in the environmental and marine industries communities. Ms. Zsoka provided media releases and social media content for the project.

Martin MPO, 2045 Long Range Transportation Plan, Quality Control, Administrator
Stuart, FL (2019-present)
Ms. Zsoka is Quality Control manager and administrator for this look at future transportation needs in Martin County. As AC Manager, Ms. Zsoka reviews all project content and collaterals prior to submission to the project team.

ADDITIONAL RELATIVE EXPERIENCE
Alachua County CHOICES Program (2009,) Marketing and Communications
City of Tampa, Drew Park Community Redevelopment Agency (2009 – 2010), Marketing
Jacksonville Transportation Authority (2007 – 2009), Marketing Services

EDUCATION
Bachelor of Science, Communication Arts, cum laude, Public Relations, Georgia Southern University
Peter F. Dobens
Project Manager

Experience – 40+ Years
Peter Dobens is a seasoned communications and public relations specialist with an in-depth background in municipal government and media in South Florida. Mr. Dobens has established long-term relationships with mainstream media outlets nationally and throughout South Florida. He has managed three television newsrooms, including WPBF-TV, Channel 25, the ABC television affiliate covering the Village of Indiantown, and is a former award-winning reporter for a New York Times newspaper. He was newsroom manager when WPBF won back-to-back Regional Edward R. Murrow Awards for the best newscast in the Southeastern United States.

A Senior Communications Manager at Quest, Mr. Dobens is responsible for project management, communications, public outreach, community relations and photography. He is skilled at crafting eye-catching public relations, marketing and branding campaigns. FEMA and NIMS certified, he is a member of the Palm Beach County/Treasure Coast Co-Op and on the Department of Homeland Security South Florida Regional Domestic Security Task Force joint media team.

RELEVANT PROJECT EXPERIENCE
City of Hallandale Beach, Public Information/Communications Manager
Hallandale Beach, FL (2012 – 2017)
Mr. Dobens created the Office of Public Information for the City of Hallandale Beach. He established media relations and social media protocols. He launched the City’s Facebook, Twitter, YouTube channel and Instagram platforms. He provided media training to elected officials and city staff. He promoted and covered all City events, including media releases, photography and videography, and social media platforms. He was part of the team that rebranded the City of Hallandale Beach, introducing a new logo. He became a trusted resource for area media providing pre-City Commission meeting briefings to identify potential stories. Also, he was a successful grant writer for the City.

Martin MPO, 2045 Long Range Transportation Plan, Project Manager, Communications/Public Outreach
Stuart, FL (2019 – Present)
Mr. Dobens is project manager for this vital funding program for future Martin County transportation projects. The 2045 LRTP is a federally required study for Martin County to qualify for federal transportation funds. Mr. Dobens wrote and produced the project video to introduce the project to residents, (vimeo.com/356490673) and managed development of the project website (www.martininmotion.com). Mr. Dobens tracks project analytics and communications for the project.

Coral Springs Community Outreach
City of Coral Springs, FL (2018-present)
Mr. Dobens supports the City of Coral Springs with Community Outreach on several of their utility construction projects including well replacement and rehabilitation projects affecting residents and businesses on a main road in the City. He works as a liaison between the City and residents. Mr. Dobens handles community outreach, door-to-door meetings with residents, content for social media and project handouts and special meetings/presentations.

ADDITIONAL RELATIVE EXPERIENCE
City of Fort Lauderdale, Community Outreach
Sunshine Water Control District, Community Outreach
FDOT Treasure Coast Household Surveys, Community Outreach, Data Collection and Research
FDOT OnBoard for Jobs, Community Outreach and Marketing

EDUCATION
Bachelor of Science, Business Administration, minor in Economics, Nathaniel Hawthorne College
Nannette Rodriguez
Social Media and Crisis Communications

Experience – 25+ Years
Ms. Rodriguez is bilingual and bi-cultural and has over 25 years of nationally recognized internal and external government and public-sector public relations and marketing experience. She successfully leads, manages, coordinates and executes communications strategy across diverse platforms and tactics. Her vast experience has developed her into an expert in media relations, social media, crisis communications, digital media, publishing, multi-platform copywriting/editing, branding, reputation management, advertising/marketing, community relations and outreach, government affairs, special events, and video production.

Quest Corporation of America, Inc., Senior Communications Manager
South Florida, FL (2018 – Present)
Ms. Rodriguez serves operations in South Florida and Southeast Florida specializing in public communications and marketing. She manages effective public involvement/communication strategies and measurable deliverables for municipalities, engineering firms, and transportation agencies including, but not limited to,
• City of Weston, FL,
• City of Dania Beach, FL,
• Dania Beach Community Redevelopment Agency,
• Martin County Metropolitan Organization,
• Florida Department of Transportation,
• Broward Metropolitan Planning Organization

ADDITIONAL RELATIVE EXPERIENCE
Chief Communications Officer, Palm Beach County Clerk & Comptroller
West Palm Beach, FL (2016 – 2018)
Ms. Rodriguez coordinated and executed internal and external communications including the release of information to the public through social media, media relations, community outreach, crisis communications, websites, digital platforms, and special events. By implementing best practice strategies to social and digital media platforms, increased engagement and reach by over 300%.

Director of Communications, City of Miami Beach and Miami Beach Redevelopment Agency
Miami Beach, FL (1995 – 2016)
Ms. Rodriguez managed a diverse team of technical and creative professionals, media relations, a PEG television station, MB magazine, marketing/advertising for events and initiatives, branding, social and digital communications, including internal and external websites, and public outreach campaigns. During her tenure, she established and successfully planned and executed many internal and external communications strategies. Some projects included addressing sea level rise with Rise Above (RISE= Resiliency In Sustainable Environment), GO Bond with Neighborhoods First, Miami Beach Trolley, citywide capital improvements with Planned Progress, voter initiative with Vote Miami Beach, mandatory recycling with I Recycle Because . . . , One Team, One City brand, and citywide signage and branding. She also established the city’s nationally recognized social media platforms and led communications for many high-profile crisis (natural, organizational, health and structural/infrastructural) scenarios, and more. Many of the projects she led and executed earned national, state and local recognition including the Top Five Government Twitter (Code for America).

EDUCATION
Bachelor of Arts, Communications, minor in Marketing, University of Miami
Chip Boeckh  
Creative Services Manager

**Experience – 20 Years**

Mr. Boeckh is a veteran graphic design professional with more than 20 years of experience as an art director and freelance graphic designer. He successfully works with and manages creative graphic design teams, freelance writers, illustrators and photographers. He is experienced at conceptualizing and organizing multiple publications and oversees all aspects of production, including directing photoshoots and video. He is highly creative, excelling at concept creation, publication branding, as well as website and print content development. Mr. Boeckh has in-depth knowledge and experience using both MAC and PCs in Adobe Creative Suite software including InDesign, Illustrator and Photoshop; Apple iWorks: Pages, Numbers and Keynote; Microsoft Office: Word, Excel and PowerPoint; QuarkXPress, and Prezi - online presentation application.

As a graphic designer for Quest, Mr. Boeckh brings his team-oriented, deadline-driven mindset and expert skills to deliver an engaging, high-quality product to clients. He is responsible for ensuring the company stays on the forefront of the latest advances in graphic design trends.

**RELEVANT PROJECT EXPERIENCE**

**City of Gainesville – Trans4ming East GNV**  
*Gainesville, FL (2018 – Present)*

Mr. Boeckh provides ongoing support for the Trans4ming East GNV project. He led the creative team in designing and developing the logos, website and other materials for this multi-faceted project involving four different project locations in the county. Design materials include project boards, newsletters, fliers, and website graphics, along with other collateral materials for public distribution. He has artfully employed creative designs for these four projects using color-coded maps and logos to differentiate similar projects within East Gainesville. Additionally, he developed wayfinding digital maps that provide options for travelers during traffic interruptions.

**Goldsboro-Wayne Transportation Authority (GWTA)**  
*North Carolina (2018 – Present)*

Mr. Boeckh maintains the GWTA brand message and marketing effort. He supported the launch of the Mount Olive Connector and Circulator Service with design of graphics and layouts for system maps, route maps, bus schedules and promotional signage highlighting the new GWTA service. Other materials created include brochures, web graphics, fliers, Ride Guides and other marketing materials. He has designed web sliders, fliers and posters for the successful “We Are GWTA” campaign using local faces and transit agency staff in advertisement. One of his many strengths in designing for transit clients is his ability to create powerful colorful graphics within limited budgets and on accelerated printing schedules.

**Manatee County Area Transit (MCAT)**  
*Manatee County, FL (2016 – Present)*

MCAT updated their service for the first time, and Mr. Boeckh stepped up to refresh the full system map and all individual route maps and schedules. He continually coordinates with the county for shared deliverable files and generated the files necessary for online posting.

**Pennsylvania Turnpike Commission (PTC), Creative Services for Marketing and Communications**  
*Harrisburg, PA (2015 – Present)*

Mr. Boeckh supports the project team with marketing and communications to stakeholders and the community by providing creative services from concept through production. Completed tasks include design and production of 20-foot conference exhibit backdrop, wrapping banner for building columns, PowerPoint presentation slides, and publication design and layout for the Turnpike annual report.

**EDUCATION**

- **Bachelor of Fine Arts**, Graphic Design, Ringling College of Art and Design, Sarasota
- **Associate of Arts**, Architecture, St. Petersburg College, Clearwater
Tomás Lautaro Monzón
Video Services Support

Experience – 5 Years
Tomás Monzón is a fully bilingual (English/Spanish) communications and technology specialist with experience in multiple public and private industries. Mr. Monzón takes pride in being able to identify priorities, accomplish tasks and work in a fast-paced environment with complete accuracy and dependability. A multimedia expert with years of experience in writing, video production, and graphic design. He is well versed in creating fact sheets, coordinating public meetings, social media and working with the public. Mr. Monzón stays informed of current community outreach trends and transportation developments through participation in community involvement groups. His experience dealing with the public has yielded an uncanny ability to relate to people from numerous demographics.

RELEVANT PROJECT EXPERIENCE
Florida Department of Transportation, Communications Consulting Services on Miscellaneous Construction Projects
Miami-Dade County, FL (2018 – 2019)
As an Assistant Public Information Specialist on various FDOT roadway construction projects, Mr. Monzón provided public information services, performed customer satisfaction surveys, generated social media content for distribution by the FDOT Public Information office, developed and maintained stakeholder databases, coordinated logistics for public meetings including the preparation and staffing of sign-in tables, performed door-to-door community outreach to stakeholders regarding construction activity and potential construction impacts, maintained a project issues log, created and distributed project fact sheets and email blasts and supported the activities of the Public Information Specialist.

Florida Department of Transportation, State Road (SR) 968/W Flagler St and SW 1 St Reconstruction Projects
Miami, FL (2018 – 2019)
This group of four roadway reconstruction projects along the SR 968 corridor in the Little Havana neighborhood of the City of Miami. The scope of work included reconstructing the roadway, installing new lighting, traffic signals and pavement markings, adding an exclusive bicycle and shared-use lane, providing new sidewalks and pedestrian ramps and installing new storm water drainage structures. Mr. Monzón was responsible for creating and distributing fact sheets, meeting with community businesses/residents to provide information and answer questions about the project. He is responsible for drafting comment responses and maintaining a document database.

Florida Department of Transportation, State Road (SR) 90/SW 8 St Safety Improvement Project
Miami, FL (2018 – 2019)
Mr. Monzón provided public information services on this safety improvement project along SR 90/SW 8 Street in the Little Havana neighborhood of the City of Miami. The project included installing mid-block crossing and upgrading pedestrian signals. He was responsible for creating and distributing fact sheets, coordinating a public meeting and correspondence with the community.

ADDITIONAL RELATIVE EXPERIENCE
Fit Kids of America
Miami, FL (2017)
Mr. Monzón developed and taught a television production and journalism curriculum to summer camp attendees aged 6 to 13, working hands-on with students and providing instruction in the use of camera equipment, video editing software & proper scriptwriting techniques.

EDUCATION
Bachelor of Arts, Miami Dade College, in Information Systems Technology, 2018
Associate of Arts, Miami Dade College/Honors College, Magna Cum Laude, Communications and Mass Journalism, 2015
Dylan Conway  
Website Services Support

Experience – 18 Years  
Dylan Conway has more than 18 years of experience in information technology (IT) and website services. He has extensive experience with Windows client/server networks, website development and maintenance, and a wide range of software applications, as well as working across various online platforms and content management systems. He understands the need for websites to be functional and user-friendly, with easy site navigation, a more streamlined site plan, easy to read text and inviting graphics. He provides high-quality customer service, dealing effectively and efficiently with clients and other content providers. He is adept at ensuring website quality, performance and reliability.

Mr. Conway currently supports Quest’s contracts through the development and maintenance of project websites. Mr. Conway has extensive experience with Dreamweaver, Photoshop, Linux operating systems and database-driven websites, as well as HTML, CSS, PHP, JavaScript and Content Management Systems including WordPress, Joomla and Pulse. He has extensive experience with the latest Windows platforms, MS Office products, network connectivity and TCP/IP configuration. His ingenuity, motivation and proven organizational skills make him a true asset to the organization.

RELEVANT PROJECT EXPERIENCE

Boca Raton Airport Authority (BRAA) - Website Refresh and Update  
Boca Raton, FL (2019 – Present)  
Mr. Conway is working with BRAA to review and update the website (www.bocaiport.com) to ensure it complies with the Americans with Disabilities Act (ADA) and meets Website Content Accessibility Guidelines (WCAG).

Martin MPO, 2045 Long Range Transportation Plan, -- Webmaster/developer/designer  
Stuart, FL (2019 – Present)  
Mr. Conway designed, developed, manages and maintains the Martin in Motion (www.martininmotion.com) website for the Martin Metropolitan Planning Organization 2045 Long Range Transportation Plan. Mr. Conway developed an interactive map to track visitor comments and suggestions for transportation improvements. He maintains a contact log, analytics and content log.

Crosstown Bridge Extension Project – Website Development  
Port St. Lucie, FL (2015 – 2019)  
Mr. Conway completed the development of the website CrosstownExtension.com to support the building of the Crosstown Bridge Extension in Port St. Lucie, Florida. This mobile device friendly responsive website is used by the community to keep up to date as the project progresses. The site’s intuitive navigation system permits easy access to project news, traffic impacts, construction and aerial photos, frequently asked questions, and special events.

EDUCATION  
Computer Science/Mathematics, Temple University
D. Questions/Responses to Scope of Services

Our first objective when starting a new contract is to fully understand the client’s goals and expectations. We would conduct a kick-off meeting with your staff and Quest to introduce the key players, establish communication protocols and approval processes and establish priorities. We want to work as an extension of your team to engage your residents and support your efforts. Once this meeting has taken place, Quest will then draft a strategic plan and timeline to reach your goals and establish activities to take place each month. When preparing a timeline and approach, our team will define your key target audience and deliverables. We will be sure to work withing the established and approved budget.

Our Project Manager Peter Dobens will be the primary point person to attend meetings and provide the services identified in the scope of work. He will track and report activities each month and meet with your team in person or by phone regularly to track activities and provide updates. Our understanding of the scope and activities we will perform are broken out below:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Quest Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Execute two weekly strategy discussions with designated Village contact(s) by phone</td>
<td>Project Manager Peter Dobens will have regular meetings with the Village by phone and in person, as needed. He will report on ideas and activities weekly.</td>
</tr>
<tr>
<td>Read the Village Council Meeting Agendas for opportunities for information sharing with the public</td>
<td>Our team will read the Council agendas and stay up to date on Village events and activities to help identify ways to spotlight the Village and provide community updates. Our team will assist with preparing content and graphics for distributing information.</td>
</tr>
<tr>
<td>Monitor local and national publications and online alerts for stories about or of concern to Indiantown</td>
<td>Our team will track and pull media and provide weekly updates to Indiantown. Any news story deemed urgent will be sent immediately. Quest can help draft key and consist messages for media and resident responses.</td>
</tr>
<tr>
<td>Provide on-call services for the Village Manager and other duly authorized representatives of the Village to answer questions, develop strategies, or otherwise aid in efforts related to the scope of the retainer (Consultant’s cell phone number will be provided to staff and will be available 24-7)</td>
<td>Peter Dobens will be available 24 hours a day to support the Village Manager and representatives. Peter will work with the Village to be proactive as well in developing strategies and crafting messages. We have a team of resources backing our Project Manager to support with crisis communication, social media and other support needed for this contract.</td>
</tr>
<tr>
<td>Monitor and report on communications metrics on a monthly basis</td>
<td>Our team provides a monthly report on activities completed and hours used. Throughout the contract we will analyze and measure our success using a variety of means and methods. We will work closely with you each step of the way to ensure we are meeting your goals and expectations.</td>
</tr>
<tr>
<td>Develop and manage a 12-month calendar for Village communications and a related plan for executing</td>
<td>Our team will put together a strategic communications plan and timeline. This will include weekly activities to support with social media, communicating to residents and spotlighting the Village. We can support the Village in creating a calendar and posting activities, meetings and events for the public.</td>
</tr>
<tr>
<td>Revisit the 12-month calendar every quarter with a two-hour, on-site strategy/training session with senior staff or staff focused on communication matters from each department</td>
<td>Quest team will meet with the Village in person each quarter to review the calendar and discuss news opportunities to add to the calendar. We can use the opportunity to have discussions and training to support staff moving forward with outreach, media relations, social media, website ADA and more. We can work on crafting messages and how to identify news that will be relevant to residents in Indiantown.</td>
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</tr>
<tr>
<td>Connect with other leaders and communication staff in sister agencies and organizations that serve Indiantown residents (i.e. utility agencies, Chamber of Commerce, Martin County, Martin County community service groups, etc.)</td>
<td>Our team excels in grassroot communication. We believe in taking our client messages to other agencies, organizations and directly to the residents. Since we are an extension of your team, we can provide information, presentations and updates. We have established relationships with the surrounding agencies and can help connect and communicate for the Village. We have also supported our clients with representation at community events, in person surveys and door to door messaging.</td>
</tr>
<tr>
<td>Monitor traditional and digital media for Indiantown coverage and mentions and notify the Village Manager’s Office of stories that should receive their attention</td>
<td>The team will monitor all media for Indiantown and notify the Village Manager’s Office of a story that should receive attention. Depending on the story, we can help craft ideas for responses to stories, resident follow up or how to spotlight the story for residents.</td>
</tr>
<tr>
<td>Champion, manage, and monitor the use of all forms of communication including social media platforms, the Village’s media channels, print materials, surveys, and other communication methods that are available or might become available in the future</td>
<td>We can easily transition to manage and monitor all social media. We have experience creating social media and social media protocols for agencies. We have experience monitoring and responding to comments and questions from the public on social media. Residents expect responses in a timely manner and we can support in preparing appropriate and timely messaging. We can support in preparing surveys and schedule social media posts that are approved in advance. We can work with you to ensure communication is consistent visually and through the messages we are conveying. We will make recommendations and support all forms of media from printing, video to online.</td>
</tr>
<tr>
<td>Create Nextdoor Posts on the Village’s Main Nextdoor account on behalf of the Assistants to the Village Manager; various departments post their own announcements on Nextdoor directly.</td>
<td>We can craft content for Nextdoor posts informing residents of key events, new and keeping them informed of things going on near them.</td>
</tr>
<tr>
<td>Design and schedule posts to Village’s social media platforms, including Facebook, Twitter, Instagram and Nextdoor</td>
<td>We will create and schedule posts using different media platforms. Each platform is unique in the way you post. The same schedule and message would need to be catered to each platform. We can help train staff on the differences for each social media and how to successfully use it to reach your audience. We can help come up with unique hashtags and encourage residents to post pictures using the hashtags.</td>
</tr>
<tr>
<td>Task Description</td>
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</tr>
<tr>
<td>Respond to all inquiries from the Public’s posts and direct messages on the Village’s main above-mentioned accounts after verifying information from Village staff (if required);</td>
<td>We will track and respond to all questions and concerns from the public. We will work with the Village on approved messaging and ensuring that all inquiries are responded to in a timely manner.</td>
</tr>
<tr>
<td>Advise identified Village social media managers on use of their social media platforms including responses to inquiries on social media</td>
<td>We will work with all social media managers to make sure they understand the difference in the social media platforms and how to best use them. We will work to help craft consist messaging and responses for inquiries in advance. We can help identify some of the anticipated questions up front.</td>
</tr>
<tr>
<td>Provide recommendations to staff to improve the Village’s website</td>
<td>We have worked with several agencies to create and update websites. We will work with you to ensure the website is ADA compliant, user friendly, informative and visually appealing. We can support with website updates and content.</td>
</tr>
<tr>
<td>Provide Village staff with guidance on email marketing best practices and emails as a key source for social media content. Identify appropriate imagery to use, where possible to aid the work impact and reach of social media posts</td>
<td>We can create an email schedule and help with email content. We can help staff understand the best practices when using emails as a source. We can help with graphics and content.</td>
</tr>
<tr>
<td>Provide Village staff with advice on stakeholder outreach, communication efforts, and public engagement initiatives</td>
<td>We will help identify key stakeholders and the messages and goals for reaching those stakeholders. Not every message should be communicated the same way. There are also better ways to reach certain stakeholders. We will offer advice and recommendations and can support with the outreach from content creation to distribution. We can attend community and organization meetings, community events, neighborhood associations and more on behalf of the Village.</td>
</tr>
<tr>
<td>Prepare at least three Press Releases per month based on content provided by Village staff</td>
<td>We will work with the Village to identify the right information to be included in press releases. You want to be sure you are drafting a press release that has meaning and will be covered by local media. We will come up with ideas and content for monthly press release distribution.</td>
</tr>
<tr>
<td>Utilize Constant Contact to keep subscribed individuals abreast of topics of concern, as well as any other email automation software used by the Village</td>
<td>We have experience in providing messaging and content for constant contact. We can draft content and provide a schedule for emails to be sent to residents.</td>
</tr>
<tr>
<td>Provide leadership and direction for the implementation and maintenance of a Village wide strategic communication plan that keeps the public and the workforce highly informed, engages the public in local government, and manages media relations</td>
<td>We have drafted and implemented hundred of communication plans for our clients. We can support in implementation and maintenance of the Village wide Plan. We will start by reviewing the plan in place. We will make recommendations on engaging the public, government and media and help track that the plan identified is in fact reaching those audiences identified.</td>
</tr>
<tr>
<td>Advise the Village Leadership team during crisis management when responding to emergencies, including coordinating communications efforts</td>
<td>We will work with the Village to draft a crisis communication plan up front so when a crisis comes the Village will be prepared. The plan will help identify the main communicators for the Village and how a crisis would be handled. We can also work to train the identified communicators in speaking to the media. The crisis communication plan will be presented to staff so they know what to do in case of a crisis. Of course, you can't plan for everything, our team is also available 24/7 to support the Village should something come up. Our Project Manager and Crisis Communication Support Nannette are readily available.</td>
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<tr>
<td>Perform ad hoc work including: additional press releases beyond the scope identified above, photography services, video production services, newsletter development and assembly, graphic design support, writing speeches and letters to the editor, presentation preparation, media training session, drafting or reviewing policies and procedures, organizing press conferences or writing articles for the websites or other publications, marketing campaigns and the strategies, tactics and resources necessary to support the strategic mission of the Village. Campaigns may be developed in conjunction with external consultants. Ad hoc work must be approved by the Village in advance</td>
<td>With the resources in place and the experience of our team, we can provide additional services to the Village as needed. All of the ad hoc work listed can easily be handled by the proposed team. We will work as an extension of your team to support you with your anticipated needs to help reach your goals. We understand these activities are in addition to the proposed scope and hours and timelines will need to be approved in advance.</td>
</tr>
</tbody>
</table>

2. Quest envisions a world where heartfelt communications inspire awareness. As a result, we aim to be America’s choice for marketing and communications and the professional consultant of choice for improving, developing, and delivering communications products and services nationwide, all while engaging with our audience, and achieving maximum impact for our customers. We are made up of dynamic, innovative and solution driven teams who truly love each other and ultimately love serving our customers. Our employees make an impact and reflect our core values, purpose and our strategic priorities.

E. Fees

1. We propose a flat rate of $90.00 an hour. This includes all services needed for the scope of services outlined. We anticipated using 10 hours a week for the first year. Total budget anticipated at $46,800.
2. Quest will provide a monthly invoice and report outlining hours spent and activities completed. Payments are expected.
3. The fee above includes Quest services, travel costs. The expenses not covered in the hourly rate include additional costs such as printing, venue rentals and advertising. Quest will obtain three quotes and provide the Village with the information for review and approval prior to execution.
F. References

1. City of Weston
   Denise Barrett,
   Director of Communications
   17200 Royal Palm Blvd
   Weston, FL 33326
   954.385.2000
   Dbarrett@westonfl.org

   Start Date: November 2019
   End Date: Ongoing

   Project Description: Quest was asked to support the City of Weston for three months in-house with communications and social media. Quest set up and launched the City of Weston Facebook and Instagram from the ground up. Our team helped re-write a comprehensive social media policy for the City. We continue to assist the department with communication support services including writing content for the City e-newsletter, internal website content management, assisting with the Weston University Program and Census 2020 Campaign.

2. City of Port St. Lucie
   Frank Knott
   Project Manager, Public Works Department
   121 SW Port St. Lucie Boulevard,
   Port St. Lucie, FL 34984
   772-344-4290
   Fknott@CityofPSL.com

   Start Date: January 2015
   End Date: Ongoing

   Description: Quest provided public involvement and public information services for the City’s Crosstown Parkway Extension Design/Build. This high-profile project involved building a 4,000-foot bridge that crosses over the North Fork of the St. Lucie River in the City of Port St. Lucie, connecting the existing Crosstown Parkway from Manth Lane to U.S. 1. Quest worked closely with the project team and City to communicate project information to residents, elected and appointed officials, and other impacted stakeholders by creating, maintaining, and promoting a project-specific website, www.crosstownextension.com; monitoring and responding to stakeholder calls via a 24-hour hotline and e-mail; conducting media relations, including writing and distributing press releases and facilitating reporter inquiries; hosting public meetings and special events; and coordinating with the local community and community groups about project information. Quest also prepared for and executed a successful bridge opening event, which included a ribbon cutting, car parade, bridge tours, speeches by elected officials and dignitaries, and activities that attracted more than 2,000 attendees.

1. City of Coral Springs
   Najla Zerrouki, P.E.
   City Engineer, Public Works Utilities and Engineering Division
   3800 NW 85th Avenue
   Coral Springs, FL 33065
   954-345-2188
   nzerrouki@coralsprings.org

   Start Date: September 2018
   End Date: August 2019
Description: Quest provided public involvement, public outreach regular website updates for the City of Coral Springs on this potable well replacement and rehabilitation project. The wells are in residential areas and extensive coordination was required with the Broward County Public Schools to temporarily relocate bus routes and pickup areas. Quest provided collaterals, fliers and door hangars to keep residents informed throughout the project. Quest maintained a 24-hour hotline and logged all calls. Quest ensured resident concerns were logged and addressed. Quest provided photography to assist in addressing concerns and to document the project.

G. Implementation

Village of Indiantown Communications Timeline

ON-GOING TASKS
- Weekly strategy conference calls to discuss potential news or information opportunities
- Monthly agenda review for potential stories and dissemination to Village residents
- Monthly analytics reports
- Monitor local and national media for mentions
- Website review and suggestions
- Content for social media posts
- On-call support and availability
- Update 12-month calendar
- Monthly connections with areas businesses and communities about potential events
- Special events

FEBRUARY 2020
- Execute contract

MARCH 2020
- March 4, 2020 - Kickoff meeting with Quest team and Village officials. We would suggest key Village officials and the Village Mayor or designee
  - Provide 24-hour telephone line for contact
  - Secure access to social media
  - Set schedule for weekly calls to discuss potential stories, news releases, social media, NextDoor, Constant Contact, photography needs
  - Set schedule for news releases
  - Establish chain or commend for media team and Village.
  - Develop templates and protocols
- March 12, 2020 – Attend Village Council Meeting for introduction and discussions
- Begin to develop 12-month Village calendar for website and distribution
- Create standard design for Village social media and all collaterals
- Initiate contacts with Discover Martin, area chambers of commerce, Realtors and other business entities. Explore having City Manager or Mayor become a speaker at Martin County Chamber of Commerce breakfast in May or June. Make sure they are on contact list.
- If requested in scope, begin website review for ADA/WCAG compliance

APRIL 2020
- Present 12-month calendar (include key election dates)
- Social media month introduce new templates for social media platforms.
- Develop Speakers/Experts list for area groups and area media
- Set dates for media/social media training/coaching for staff and open this to elected officials each quarter
- If requested in scope, complete website review for ADA/WCAG compliance. Train Village staff in compliance
- Develop Crisis Communications Plan
MAY 2020
- May 6, 2020 - Quarterly in-person meeting and training with staff to discuss summer quarter
- Website review and suggested updates.

AUGUST 2020
- August 5, 2020 - Quarterly meeting and in-person staff training
- If included in scope, develop cover and inside page design for 2021 budget report

NOVEMBER 2020
- November 4, 2020 - Quarterly meeting and in-person staff training

FEBRUARY 2021
- February 3, 2021 – Quarterly meeting and in-person staff training

H. **Certificate(s) of Insurance**

Upon award of contract, Quest will provide the certificates of insurance evidencing the required coverage types and the minimum limits as outlined in the Village Draft Standard Agreement.

I. **Business Tax Certificate (included in attachments)**

J. **Standard Village Professional Services Agreement**

Quest reviewed the draft agreement included in this RFP. We do not have any questions or changes. We concur with the terms and conditions listed.
State of Florida
Department of State

I certify from the records of this office that QUEST CORPORATION OF AMERICA, INC. is a corporation organized under the laws of the State of Florida, filed on August 25, 1995.

The document number of this corporation is P95000066089.

I further certify that said corporation has paid all fees due this office through December 31, 2019, that its most recent annual report/uniform business report was filed on February 7, 2019, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Seventh day of February, 2019

Tracking Number: 3988501422CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication
Letter of Transmittal

To whom it may concern at the Village of Indiantown:

Quest Corporation of America, Inc. has read and will comply with all terms and conditions of the RFP. Thank you for the opportunity to work with the Village of Indiantown. We look forward to showing you what our team can do for you.

Sincerely,

Diane Hackney, Assistant Vice President
Quest Corporation of America, Inc.
Dear Business Owner:

Your 2020 Pasco County Business Tax Receipt is printed above. Please detach the receipt and display it in a place that is visible to the public and available for inspection.

The Pasco County Business Tax Receipt is in addition to any other license or certificate that may be required by law and does not signify compliance with zoning, health, or regulatory requirements. The Pasco County Business Tax Receipt is non-regulatory and is not meant to be a certification of the holder’s ability to perform the service for which it is registered.

Business Tax Receipts expire September 30th. Annual renewals are mailed in June to the address of record at that time. Please contact our office if there are any changes to your business name, ownership, physical address, or closing of your business.

Thank you for allowing us to serve you!

MIKE FASANO
PASCO COUNTY TAX COLLECTOR
Response to
VILLAGE OF
INDIANTOWN
RFP #2020-001-HB

for
COMMUNICATIONS
CONSULTANT

February 13, 2020
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Executive Summary

Founded in 2003, the Firefly Group is a full-service marketing, public relations and community outreach firm headquartered in Palm City, Florida and the only company of our kind on the Treasure Coast. Our firm has a wide range of professional capabilities and demonstrated success working in Martin County and the Treasure Coast, Okeechobee, and northern Palm Beach. Our clients include government agencies; transportation, engineering and environmental consultants; businesses of all sizes and industries; landowners; and many impactful nonprofit organizations throughout the region. Firefly as a firm, as well as our individual staff, also have strong and authentic relationships throughout the Treasure Coast and deep roots in Martin County. Our reputation is stellar.

Firefly complements our staff of six with a larger network consisting of our long-time website development partner, Impressive Click, local graphic designers, photographers, videographers, printers, and other vendor relationships. We offer a comprehensive range of services described below that no other local communications firm is capable of offering:

- Public relations - media relations, community relations, government relations, crisis communications, issues and reputation management
- Public education, public outreach, community engagement and grassroots advocacy building programs
- Website design, development, hosting, maintenance, SEO and pay-per-click campaigns
- Social media – (Facebook, Instagram, Twitter, LinkedIn, Nextdoor, etc.) strategic and creative planning and implementation, content curation, posting, management, boosting posts and ad campaigns
- E-mail marketing, blogging and other digital communications
- Marketing plan development, logo and brand identity, copywriting and messaging, collateral materials development
- Strategic planning, SWOT analysis, online surveys and stakeholder focus groups
» Advertising and direct mail

» Comprehensive Event Management services - public meeting coordination, groundbreakings, ribbon cuttings and fundraising events of all types

The Firefly Group has also been recognized over the years with nearly 90 awards at the local and state levels from the Florida Public Relations Association, The Public Relations Society of America and the Advertising Federation of the Treasure Coast for our exemplary work on behalf of clients throughout Florida. Firefly was also recognized three times by HR Martin as a “Best Places to Work” in Martin County. Firefly is a Florida-based S-Corporation and is also a certified Woman-Owned Business through the State of Florida’s Office of Supplier Diversity.

(2)

QUESTIONNAIRE/ Response to Scope of Services

A. Company and General Information

1. Firefly Communications Inc.
   d/b/a The Firefly Group
   1211 SW Sunset Trail
   Palm City, FL 34990

2. Letter of transmittal signed by an individual authorized to bind the respondent, stating that the respondent has read and will comply with all terms and conditions of the RFP. See Attachment A

3. General information about the primary contact who would be able to answer questions about the proposal. Include name, title, telephone number and email address of the individual.

   Stacy W. Ranieri, founder, president and Chief Illuminator
   772.287.5272 Office    772.260.5483 Mobile
   stacy@fireflyforyou.com
B. Qualifications and Experience of the Firm

1. *Describe your firm’s history and organizational structure. Include the size of the firm, location of offices, years in business, organizational chart, name(s) of owner(s) and principal parties, and number and position titles of staff.*

President, founder and Chief Illuminator Stacy Ranieri launched The Firefly Group in 2003 as a one person firm which she has grown into the largest, full-service public relations and marketing company on the Treasure Coast. Stacy brings first-hand experience working in and for local governments beginning with her tenure as an employee in the Martin County Utilities and Solid Waste Division in the 1990s. Her historical perspective and institutional knowledge enable the Firefly Group to work effectively to balance the needs and constraints of a municipality with an understanding of the public’s perception of local government and their community concerns.

This knowledge has enabled Firefly to be an effective and valued consulting partner to our government clients and for government projects for over 16 years, when plain language communications, authentic public education and outreach initiatives, and stakeholder engagement are needed to build transparency, understanding, credibility and support for governments and their projects and initiatives.

Firefly is a woman-owned business located in Palm City, Florida, with a staff of six as well as interns and long-term vendor partner relationships.

*Staff*

Stacy W. Ranieri  Owner, Founder, president, Chief Illuminator
Pat Austin Novak  Sr. Communications Strategist
Melissa Zolla  Marketing and Creative Director
Tiffany Smith  Marketing Coordinator/Spark Starter
Sarah Ciampi  Marketing Coordinator/Spark Starter
Debra Martin  Finance/Office Management
Andrew Webster  Website Development
Billy Nelson  Graphic Designer

*Our firm is a creative and strategic problem solving agency and we work collaboratively as a team. Beyond Stacy Ranieri owning the firm, there is no official organization chart.*
2. **What is the primary business of the parent company and/or affiliates?**

   Public Relations, Marketing, Communications

3. **Which office(s) of your organization will have primary responsibility for managing this account? List the members of your team who will be responsible for providing the services and for ongoing support. Describe the duties of these team members.**

   Firefly is headquartered in Palm City, Florida, a quick drive to Indiantown so our staff will be easily accessible to the Village of Indiantown staff, council members and consultants. Members of the team who will be responsible for providing services and support are:

   Stacy Ranieri, President and Client Manager providing strategic planning, creative input and comprehensive oversight

   Melissa Zolla, Project Manager, providing strategic planning, creative input, comprehensive oversight and day-to-day management

   Tiffany Smith, Project Coordinator, providing strategic planning and creative input support, and day-to-day management

4. **Provide the estimated number of hours (weekly) and billing rate for each consultant team member providing services.**

   Until the final scope of work is confirmed and there is a clear understanding of the responsibilities of each party, it is difficult to accurately estimate the number of hours required to fulfill the scope of services.

   Initially, the scope of work will be front loaded and may require 30-40 hours a week. As the scope of services rolls out, the number of hours may reduce to 20-30 hours per week.

<table>
<thead>
<tr>
<th>Staff rates</th>
<th>Hourly rate</th>
<th>Village discounted rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$215</td>
<td>$150</td>
</tr>
<tr>
<td>Sr. Communications Strategist</td>
<td>$195</td>
<td>$150</td>
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<tr>
<td>Marketing and Creative Director</td>
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<td>$100</td>
</tr>
<tr>
<td>PR/Marketing Coordinator</td>
<td>$100</td>
<td>$75</td>
</tr>
<tr>
<td>Graphic/Website Design</td>
<td>$95</td>
<td>$75</td>
</tr>
<tr>
<td>Administrative</td>
<td>$45</td>
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</table>
5. **What is your firm’s experience conducting the services requested?**  
*Describe comparable services performed by your firm in the last five years, including the number of accounts, scope of service, and their status.*

Firefly has been in business for 16 years and has extensive and demonstrated success, capabilities and the experience needed to provide comprehensive, strategic and innovative services to the Village including comprehensive marketing and communications plans that integrate print, website, and digital social media platforms. We also have demonstrated success creating and implementing comprehensive public outreach and education programs to build credibility and enhance civic engagement for our government clients and their projects. Firefly can do the same for the Village and its programs, projects, meetings, and events.

Here are some examples of our government-related work. We have also performed similar services for dozens of non-profits, large landowners, and businesses of all sizes and industries.

**Village of Indiantown (2019)**

Last year, Firefly had the honor of creating the new Village of Indiantown Seal that you use every day.

![Village of Indiantown Seal](image)

**Indiantown Chamber of Commerce (2019–2020)**

Firefly also had the privilege of working for the Indiantown Chamber of Commerce to create their new brand identity/logo as well.

![Indiantown Chamber of Commerce Logos](image)
Martin County Board of County Commissioners (2006–Present)

» Projects: Bathtub Reef Beach Restoration Project; Jensen Beach and Manatee Pocket Moorings project; St. Lucie Inlet Dredging project; Oyster Reef Restoration project; and the Manatee Pocket Dredging project, Utilities and Solid Waste Division – Septic to Sewer conversation, recycling programs, hazardous waste roundups

» Services: Community Outreach, Public Communications & Engagement, Branding, Social Media Management, Collateral Materials Development, Website Development & Management, Crisis Communications, Advertising, Event Management, Copywriting, Grassroots Advocacy building, Public Meeting Coordination and Stakeholder Engagement

Martin County Metropolitan Planning Organization (Martin MPO) (2014 – Present)

» Moving Martin Forward, 2040 Long Range Transportation Plan; Bicycle, Pedestrian and Trails Master Plan; MPO federal recertification.

» Logo and Branding, Community Outreach, Public Communications & Engagement, Branding, Social Media Management, Collateral Materials Development, Advertising and Notification, Grassroots Advocacy building, Public Meeting Coordination and Stakeholder Engagement

The City of Okeechobee (2017 – 2019)

» Logo/Rebranding, Website Design, Development and Hosting, Copywriting, Photography, Content Creation, Press Release Development & Distribution, Google Analytics Reporting & Training, Content Management Training

Economic Development Council of St. Lucie County (2014 – Present)

» Marketing, Advertising and Communications Support, Media Relations, Social Media, Event Management, Logo/Brand Identity, Stakeholder Surveys, Community Outreach, Public Communications & Engagement, Marketing Plans, Email Communications, Collateral Materials Development

St. Lucie County Schools (2015 – 2016)

» Communications, Media Relations, Professional Development Workshops, Preparation for Professional Development Workshops, Media Relations, Consulting Services, Crisis Communications, Press Release Development and Distribution, Social Media Training
Florida Department of Transportation (2015 – 2019)

» PD&E Study and Construction Plan Public Workshops for State Road 714 from Citrus Boulevard to SW Martin Downs Blvd in Palm City (FM 436870-1-22-02)

» Community Outreach, Public Communications & Engagement, Social Media Management, Collateral Materials Development, Public Meetings Coordination and Stakeholder Engagement

Town of Sewall’s Point Proposed Septic to Sewer Project (2017 and 2019)

» Assisted the Town of Sewall’s Point with public outreach and education to residents regarding proposed septic to sewer conversion

6. Comment on other areas that may make your firm different from your competitors.

As a local, full service marketing, public relations and community outreach firm that has multiple full time employees, Firefly is uniquely qualified to serve as your public communications consultant and handle your needs in-house.

Our competitors are either from out-of-town or are too small to handle the scope of services you are seeking. The out-of-town firms will have added expenses of travelling and will not be as accessible to the Village. Also, because they are from out of town, they do not have a pulse of the Indiantown community or Martin County and the region as whole. We live in a small community where personal relationship-building is one of the most important factors in creating trust and credibility. Firefly has that. The out of town firms do not.

We know the local competition well, and while they have expertise in various elements of your desired scope of work, to our knowledge, none of them have the in-house resources to develop, implement and maintain the scope of services you have outlined in the RFP. Anyone claiming to be able to handle a scope of work of this magnitude will need to hire independent contractors or additional staff.
C. Qualifications and Experience of Proposed Project Team

1. Describe the qualifications of staff proposed for the assignment, position(s) in the firm, and types and amount of equivalent experience. Be sure to include any municipal agencies they have worked with in the past three years and their level of involvement. A description of how overall supervision will be provided should be included.

Stacy Ranieri, Owner, Founder, president and Chief Illuminator

Stacy has nearly 30 years of experience in marketing, branding, public relations, community outreach and advocacy building, strategic planning and project/event management. Her firm, The Firefly Group, has a diverse client base including businesses of all sizes and industries, as well as government agencies and non-profit organizations throughout Florida. Firefly provides full-service public relations and marketing consulting services including: comprehensive campaign planning and implementation; community outreach and education programs; stakeholder engagement and advocacy building; media relations; brand identity; website design and development, social/digital media strategy and management, collateral materials development and plain language copywriting; crisis communications and issues management.

- Bathtub Reef Beach Renourishment – Client Manager
- City of Okeechobee Branding and Website Development – Client Manager
- Keep Martin Beautiful – Project Manager
- Manatee & Jensen Beach Moorings – Client Manager
- Manatee Pocket Dredging – Client Manager
- Martin County Board of County Commissioners Opposition to All Aboard Florida – Client Manager; Martin County Solid Waste & Utilities educational outreach, recycling events, customer surveys, Water Quality Report Updates – Client Manager; Oyster Reef Restoration (Martin County Coastal Division) – Client Manager
- Martin County Metropolitan Planning Organizations, LRTP 2040 – Moving Martin Forward – Client Manager
- Palm Beach County Metropolitan Planning Organization - Multimodal Corridor Study – Client Manager
- South Florida Water Management District – outreach for EAA Reservoir Project – Client Manager
- St. Lucie County Economic Development Council – Full scale marketing, branding, public relations - Client Manager
- St. Lucie Inlet Dredging – Client Manager
- Town of Sewall’s Point Septic to Sewer project – Client Manager
- Village of Indiantown – Branding/Creation of New Seal – Client Manager
Melissa Zolla, Marketing, Project Manager and Creative Director

Melissa has more than 25 years of public involvement, strategic planning, community relations, event management and social media expertise. Her areas of focus at Firefly include: public relations project planning, comprehensive community outreach strategic planning, media relations, marketing, social media campaign strategy development and implementation, graphic design, branding, collateral materials development, website design & development and event management for which she has received numerous awards.

- **FDOT 714 & Citrus Public Workshops** – Project Manager
- **Keep Martin Beautiful** – Project Coordinator
- **Martin County Anchoring and Mooring Pilot Program** – Project Manager
- **Martin County Bathtub Reef Beach Renourishment Project** – Project Manager
- **Martin County Inlet Dredging Project** – Project Manager
- **Martin County Manatee Pocket Dredging Project** – Project Coordinator
- **Martin County Metropolitan Planning Organizations, LRTP 2040** – Moving Martin Forward – Project Manager
- **Martin County Oyster Reef Restoration Project** – Project Coordinator
- **Martin County Tourism Community Engagement Project** – Client Manager
- **Palm Beach County Metropolitan Planning Organization - Multimodal Corridor Study** – Project Manager
- **South Florida Water Management District** – EAA Reservoir Project – Project Manager
- **St. Lucie County Economic Development Council** – Project Manager
- **The City of Okeechobee Branding and Website Development** – Project Manager
- **Village of Indiantown Seal** – Project Manager
Tiffany Smith, Project Coordinator and Sparkstarter

Tiffany has more than five years of public involvement, community relations, event management and client relations experience. Her areas of focus at Firefly include but are not limited to: client relations; project management, public relations and media relations; communications and collateral materials development; strategic planning; community outreach; comprehensive event planning and management; marketing plan development and implementation; branding and advertising; social media management; website management; survey development and distribution; and other client communication and administrative services.

» Banner Lake Club – Project Coordinator
» Keep Martin Beautiful – Client Manager
» Martin County Metropolitan Planning Organization, LRTP 2040 – Project Coordinator
» Martin County Solid Waste Division – Project Manager
» Martin County Utilities – Septic to Sewer – Project Manager
» PD&E for FDOT, SR 714/SW Martin Highway, Martin County (Keith & Schnars) – Project Coordinator
» SafeSpace of the Treasure Coast – Project Coordinator
» Village of Indiantown Seal – Project Coordinator

With respect to supervision, Firefly staff work collaboratively as a team; no one person works alone on a project. Formal meetings are held at least weekly to discuss status and strategy of current projects. Team interaction for current projects occurs daily as needed.

2. Identify and provide the resume(s) of the personnel who will be assigned to this project.

See resumes for Stacy Ranieri, Melissa Zolla and Tiffany Smith, in Attachment B
D. Questions/Response to Scope of Services

1. **Describe the methods by which your firm will fulfill the services requested in the Scope of Services and subsequent sections.**

   Our Approach. Firefly will provide strategic planning, marketing and branding, public relations and other communications services in coordination with Village staff. As a full service marketing and public relations firm, we have the staffing resources, expertise and creativity to manage all of the Village’s needs through a coordinated approach that involves thoughtful planning, time management skills and frequent staff meetings internally as well as communications with Village contacts. Below is a breakdown of the methods by which Firefly will fulfill the scope of work.

### Strategic Planning & Crisis Communications

» Marketing Plan. Develop a comprehensive, strategic and innovative communications and marketing plan that keeps the public informed and engaged in local government. The communications plan will include: goals and objectives; action items; a 12-month calendar; deliverables; timeline for completion of tasks; estimated budget and metrics. The plan will also clarify roles and responsibilities for Firefly and The Village of Indiantown to ensure the greatest opportunity for success in achieving the goals and objectives set forth in the plan.

» Serve as the “champion” of the plan, managing and monitoring the various communication vehicles and using best practices for implementation and monitoring

» Provide leadership and direction to the Village including advice on stakeholder outreach, communications efforts and public engagement activities

» Conduct strategic planning sessions as needed

» Assist with crisis communications as needed

» Be accessible and “on call” to the Village Manager as needed
Administration & Reporting

» Review Village Council meeting agendas for opportunities to proactively inform the public through the Village’s various communications vehicles

» Monthly review of 12 - month calendar to ensure we remain on track with deliverables

» Monthly reporting of website, digital and social media analytics and other metrics to ensure the communications plan is working and to help inform the refinement process as needed

» Quarterly onsite meetings with Village Council and staff and conference calls as needed

Media Relations

To build greater awareness about The Village of Indiantown, increase credibility and civic engagement, Firefly recommends a proactive media relations campaign. Firefly will work closely and collaboratively with Village staff to generate positive news about the Village and to mitigate negative news being generated.

Media Relations services include:

» Development and distribution of press releases, prepared statements, media advisories or other media communications to media outlets, social media, and other targeted industry print and online publications to generate positive publicity about the Village

» Serve as media liaison as needed; field media inquiries; spokesperson coaching

» Coordinate photo opportunities

» Crisis communications/reputation management as needed

» Monitor media – local, state, national, traditional and digital - and report to
Village Manager

Social Media

Firefly will assist you in strengthening your social media presence through a creative, strategic and robust social media public engagement campaign. The primary social media platforms will be Facebook, Instagram, Twitter and Nextdoor. The Village will ensure that it has public records protocols in place for social media. Services include, but are not limited to:

» **Village of Indiantown Facebook Page**
  - Update current Facebook page with new visual and written content, multiple cover and profile pictures as needed
  - Provide strategies for posting and sharing engaging content, as well as monitoring and response protocols to increase engagement
  - Content curation, scheduling and posting in real-time
  - Response to inquiries and comments on social media when appropriate with prior approval from Village
  - Village staff will provide assistance with content and photography
  - Coordinate with The Village of Indiantown staff responses to comments on the page when necessary
  - Page monitoring
  - Provide monthly analytics reports
  - Offer recommendations for boosting specific posts or running ad campaigns as needed to increase Likes and Engagement with the page

» **Village of Indiantown Instagram and Twitter Accounts**
  - Update pages with fresh content
  - Provide strategies for posting and sharing engaging visual and written content and hashtags
  - The Village of Indiantown staff will provide assistance with visual and written content
  - Social media monitoring and response protocols to increase engagement
  - Staff training and guidance as needed
  - Offer recommendations for running sponsored content
» Village Nextdoor

 › Update your main Nextdoor account with new content and posting as needed in coordination with the Village Manager

 › Page monitoring as needed

Firefly will also monitor these social media platforms for mentions of Village of Indiantown (positive, neutral and negative) and provide response protocols as needed.

Email Marketing

Email marketing is a cost-efficient and effective way to deliver your message to Village residents, the general public, the media and other stakeholders. Firefly will assist you in creating e-newsletters using your existing Constant Contact account to bring greater awareness about The Village of Indiantown, repackaging press releases as needed, and showcasing/sharing other positive related news.

E-mail Marketing Campaign Development services include:

» Graphic design concept development and design layout for e-mail marketing template

» Coordinate with The Village of Indiantown to capture new email addresses

» Assist in developing content, messaging, copywriting and proofing

» Communications as needed to coordinate content development with Village staff

» Review analytics following each email and make recommendations
Crisis Communications & Reputation Management

Reputation is a precious commodity. We spend our entire lives building our reputation, shaping and molding it through our words and actions. For better or worse, it follows us everywhere and lives on after us. This is true for individuals, businesses and organizations. Reputation means everything. No matter what else in our lives is stolen, lost, damaged or marred, it is our reputation that is most difficult to repair. So when a reputation is under attack, especially if the attack is unfair, it has to be met head on. The stakes are enormous. The leadership of The Village of Indiantown and those committed to protecting the community’s reputation therefore need to be proactive rather than reactive.

The Firefly Group proposes a multi-phase reputation management plan that is positive in nature, committed to truth and facts, and will help to mobilize the silent majority. It involves the development of both an internal and external communications plan to educate and inform and promote the positive attributes of the Village of Indiantown and the progress being made as a new municipality. You need to be your own storytellers or the media, bloggers and people posting on social media will be telling your story for you.

Website Review & Assessment

The goal for your website should be to provide a strong, simple, informative, visually appealing online presence to educate residents and visitors about your community and services. Firefly will review and assess your website to determine whether it is being used to its fullest potential including review of your site plan and layout, navigability, visuals, written content and SEO.
Community Relations

Part of the responsibility of the Village Council and staff is to be fully engaged in the community. Relationship building is key in a small town.

» Firefly will monitor, identify and recommend organizations and associations that would be beneficial for The Village of Indiantown to build a stronger association with.

» Provide strategic counsel on involvement in key business and civic groups.

» Monitor business and social opportunities for attendance

» Connect with other leaders and communication staff in sister agencies and organizations that serve Indiantown residents such as Chambers of Commerce, Martin County, non-profit social services agencies, etc.

2. Provide a statement of the service(s) that differentiate your firm from other respondents.

As a local, full service marketing, public relations and community outreach firm that has multiple full time employees, Firefly is uniquely qualified to serve as your public communications consultant and handle your needs in-house.

Other respondents will either be from out-of-town or will be local but too small to handle the scope of services you are seeking. The out-of-town firms will have added expenses of traveling and will not be as accessible to the Village as Firefly will be. Also, because they are from out of town, they will not have the pulse of the Indiantown community and Martin County which is another advantage of working with Firefly that differentiates us from other respondents. Indiantown is a small and special community where personal relationship-building is one of the most important factors in creating trust and credibility. Firefly has that. The out of town firms do not.

We are also familiar with the local public relations and marketing professionals in town, and while they have expertise in various elements of your desired scope of work, to our knowledge, none of them have the in-house resources to develop, implement and maintain the scope of services you have outlined in the RFP. Anyone claiming to be able to handle a scope of work of this magnitude will need to hire independent contractors or additional staff.
E. Fees

1. **Provide your fees for the proposed services. Fee quotes should be detailed by service.**

   - Strategic Planning & Crisis Communications $16,000
   - Administration & Reporting $12,000
   - Media Relations $18,000
   - Social Media $28,000
   - Email Marketing $5,000
   - Crisis Communications & Reputation Management $10,000
   - Website Review & Assessment $1,000
   - Community Relations N/C

   **Total Estimated Annual Fee:** $90,000

2. **Outline billing and payment expectations, including timing and method of payment.**

   The Village agrees to provide payment for services on a monthly basis upon receipt of an invoice from Firefly. Payment would be made within thirty (30) days of receipt of invoice. Invoices not paid within thirty days are subject to a 1.5% monthly interest charge. Firefly may also request an advance payment of fifty-percent (50%) of the costs of any collateral and production expenses to be produced through third-party vendors that have been approved by the client. Check or EFT are both acceptable methods of payment.

3. **Describe any remaining fees not previously detailed in the above, i.e. for ad-hoc services.**

   Additional ad-hoc services beyond the scope of services described in this proposal that may be needed in support of the communications plan and
implementation include, but are not limited to reimbursable expenses such as: graphic design, photography, videography, printing, postage, Google AdWords and other digital advertising campaign costs; additional copywriting services, collateral materials development; mileage; and other expenses with prior approval from the Village. Ad hoc services will be based on an hourly fee or as a flat rate. Staff rates for abovementioned services are below:

<table>
<thead>
<tr>
<th>Staff rates</th>
<th>Hourly rate</th>
<th>Village discounted rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$215</td>
<td>$150</td>
</tr>
<tr>
<td>Sr. Communications Strategist</td>
<td>$195</td>
<td>$150</td>
</tr>
<tr>
<td>Marketing and Creative Director</td>
<td>$165</td>
<td>$100</td>
</tr>
<tr>
<td>PR/Marketing Coordinator</td>
<td>$100</td>
<td>$75</td>
</tr>
<tr>
<td>Graphic/Website Design</td>
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<td>$75</td>
</tr>
<tr>
<td>Administrative</td>
<td>$45</td>
<td>$35</td>
</tr>
</tbody>
</table>

F. References

1. List the name, address and telephone number of references from at least three recent similar projects. Include a brief description of the work provided for each reference. Florida municipal or county projects are preferred. You may offer more than three recent similar projects if desired. The references should include the start date of the project and the date of completion for each project.

Martin County Board of County Commissioners

Various projects since 2011 to present

Martin County Commissioner Ed Ciamp
401 SE Monterey Road, Stuart, FL 34996
Phone 772.288.5400
**Martin County Coastal Projects**

**Key Contact:** Kathy Fitzpatrick, 772.288.5400  
**Consultant Contact:** Olsen & Associates, Kevin Bodge

Firefly has worked closely with Coastal Engineer Kathy FitzPatrick and her staff for many years on a variety of environmental projects. Most recently, the Firefly Group educated and engaged the public during high profile projects including renourishment at Bathtub Beach and dredging in the St. Lucie Inlet. Thanks to Facebook pages that received high levels of engagement for their ability to keep the community informed, with posts reaching as many as 30,000 people, Coastal Engineering was able minimize community concerns and maximize support for the projects. The family-friendly and iconic “Bathtub Beach Betty” campaign created by Firefly won awards from the Florida Public Relations Association and the American Advertising Federation for its appealing graphics, clear content, and community engagement.

Prior coastal projects include: Manatee Pocket Dredging, Oyster Reef Restoration, the alternatives analysis for the St. Lucie Inlet and the Anchoring & Moorings Pilot program, among others. Most recently Firefly conducted a public outreach meeting for the proposed Manatee Pocket Mooring project creating unique graphics and messaging to simplify, explain and communicate engineering concepts to the public. The initial public meeting attracted a standing room only crowd.

**Martin County Utilities**

**Key Contact:** Sam Amerson 772.223.7942

The conversion from septic to sewer is a hot topic, not without controversy, that requires accurate, sustained and proactive communication to garner increased community understanding and support from residents/taxpayers. Working with the Utilities Department staff, Firefly translated the scientific jargon to wording and graphics that were understandable to the general public. In addition, as part of the Utilities Department’s plan to assess customer service and water quality, Firefly conducted an online survey of more than 7,000 customers and provided a comprehensive summary of results. Firefly also created numerous education materials, including well branded, informative brochures and reports including the department’s Strategic Plan and Annual Water Quality Reports.
**Martin County Solid Waste**

**Key Contact:** Wendy Parker 772.223.7942

As the Solid Waste Department undertook to educate the public on hurricane preparedness each year, Firefly assisted the team in formulating communications and hot topics to be posted to the county’s website and distributed through the press. In addition, Firefly has been a key player in the county’s recycling program by promoting the Hazardous Waste Roundup each year through media relations, collateral materials, advertising and social media as well as other recycling education information year round.

**Opposition to All Aboard Florida/Brightline (2014-2017)**

**Key Contact:** Taryn Kryzda, 772.288.5400

It was abundantly clear from the start that residents of Martin County were not “all aboard” with plans for All Aboard Florida’s high-speed passenger trains to come barreling through our community and threaten the health, safety and well-being of our citizens. They looked to their County government to take action and the county responded. The Firefly Group worked closely with staff as part of the team to communicate to the public and the media Martin County’s position and the many complex issues that would impact their quality of life if All Aboard’s project came to fruition. From media relations support and messaging to assistance with staff presentations at county commissions meetings, Firefly worked hand-in-hand in the trenches with county staff to educate the public about the truth behind All Aboard’s project and the actions being undertaken by Martin County to protect the public interest.
Martin County Metropolitan Planning Organization
(2014 – 2019 and contracted for future projects in 2020)

Director, Beth Beltran
2401 SE Monterey Rd, Stuart, FL 34996
Phone: 772. 221.1498

Key Contact: Beth Beltran, 772.221.1498
Consultant Contact: Kimley Horn, Stewart Robinson, 954.732.0882

The MPO’s Long Range Transportation Plan is of great significance to every member of the public. MPO Administrator Beth Beltran, the MPO Advisory Committee, and the entire staff knew how important community understanding and engagement would be to the success of a plan that would guide the parameters of the transportation network in Martin County for the next twenty-five years. Working with the Firefly Group, the MPO was able to create an appealing logo, an attractive and user-friendly web site that can be continually updated, an opinion piece in the local press, and news releases that were picked up by the local media. Firefly also took the lead in attracting the public to open meetings to learn about the elements of the plan at every step. This process was successfully repeated when the MPO launched the Bicycles, Pedestrians and Trails Master Plan process, resulting in a plan that truly reflects the constituency it serves.

The St. Lucie Economic Development Council
(2014 to Present)

Executive Director, Pete Tesch
500 NW California Blvd, Port St. Lucie, FL 34986
Phone: 772.336.6250

Key Contact: Pete Tesch, 772.336.6250

Firefly has been providing strategic marketing and branding services to the EDC for several years, including their initial rebranding of the membership-driven organization through the creation and roll out of their new logo, as well as a marketing strategy to attract interest among partners who were invested in the future economic success of St. Lucie County, its businesses and its citizenry. The materials Firefly produced for the EDC won awards from the Florida Public Relations Association (FPRA) and the Advertising Federation; even more importantly, it generated significant business leads and membership for the EDC.
The City of Okeechobee  
( 2017 to 2019)

City Administrator, Marcos Montes De Oca, P.E.,  
55 SE 3rd Avenue, Okeechobee, FL 34974  
Phone: 863.763.9812

Key Contact: Marcos Montes De Oca, 772.336.6250

Firefly created a visually appealing, easy to navigate new website to provide the public with easy access to information. The website was coded so it is mobile responsive and adjust to all mobile platforms. The site was also coded in an easy to use customized CMS (content management system) format so staff can easily make changes and updates to the website content on their own. Firefly developed the copy write, photography, graphic design and site plan for the new website. Firefly also provided training on use of the CMS and google analytics for the new website.

G. Implementation Schedule

1. Include a detailed implementation schedule with an estimated start date of March 1, 2020 and note key milestones and timelines for deliverables. Identify any assumptions used in developing the schedule.

See Attachment C

Your stated objectives and our proficiency in designing websites and bringing them to life will guide our work.
Attachment A

LETTER OF TRANSMITTAL
January 24, 2020

Village of Indiantown
Village Clerk
16550 SW Warfield Blvd
Indiantown, FL 34956

Dear Village Clerk:

Enclosed is The Firefly Group’s response to The Village of Indiantown Request for Proposal for Communications Consultant RFP #2020-001-HB.

This letter of transmittal serves to acknowledge that the Firefly Group has read and will comply with all terms and conditions of the RFP.

Sincerely,

Stacy Weller Ranieri
Owner and CEO
Firefly Communications, Inc. d/b/a The Firefly Group
Attachment B

RESUMES
Stacy W. Ranieri

Stacy Ranieri is the founder, president and Chief Illuminator of The Firefly Group, a full-service public relations and marketing firm founded in 2003 and headquartered in Palm City, Florida.

Born and raised in New York, Stacy’s professional career prior to moving to Florida in 1994 included a variety of marketing and communications positions in the private, public and non-profit sectors with such notable organizations as the National Audubon Society, the New York Landmark’s Conservancy, the City of New York and MetLife.

Stacy has nearly 30 years of experience in marketing, branding, public relations, community outreach and advocacy building, strategic planning and project/event management. Her firm has a diverse client base including businesses of all sizes and industries, as well as government agencies and non-profit organizations throughout Florida. Firefly provides full-service public relations and marketing consulting services including: comprehensive campaign planning and implementation; community outreach and education programs; stakeholder engagement and advocacy building; media relations; brand identity; website design and development, social/digital media strategy and management, collateral materials development and plain language copywriting; crisis communications and issues management.

Stacy’s reputation, leadership and consensus building skills, collaborative approach, and strategic and creative thinking make her a powerful addition to any project team.

Firefly is the approved public communication’s vendor for Martin County and has served as the lead on numerous governmental education and public outreach projects and activities such as:

» Bathtub Reef Beach Renourishment
» Manatee & Jensen Beach Moorings
» Manatee Pocket Dredging
» Martin County Board of County commissioners - Opposition to All Aboard Florida
» South Florida Water Management District – EAA Reservoir Project
» Martin County Solid Waste & Utilities educational outreach, recycling events
» Martin County Metropolitan Planning Organizations, LRTP 2040 – Moving Martin Forward
» Oyster Reef Restoration
» Palm Beach County Metropolitan Planning Organization - Multimodal Corridor Study
» Pineland Prairie – Knight Kiplinger
» St. Lucie Inlet Dredging

Scope of Services for those public outreach efforts included: stakeholder engagement; branding and logo design; collateral materials development; website and social media design, development and management; email communications; media relations and press release development and distribution; government relations; public meetings and workshop facilitation and other special event management.

Stacy has a Bachelor of Science in Marketing and International Business from New York University’s Stern School of Business and a Master of Science in Environmental Resource Management from the Florida Institute of Technology.
Tiffany is known at The Firefly Group as a Sparkstarter, though her conventional title is Account Executive & Public Relations Specialist. Born and raised in Stuart, Florida, Tiffany has a strong background in client relations and management.

Before joining The Firefly Group, Tiffany was employed by specialty merchandising boutiques in which she held a management role. In this role, she was responsible for coordinating and implementing promotional campaigns, client and customer relations, budgeting, managing staff and other day-to-day tasks as needed.

Tiffany has more than five years of public involvement, community relations, event management and client relations experience. Her areas of focus at Firefly include but are not limited to: client relations; project management, public relations and media relations; communications and collateral materials development; strategic planning; community outreach; comprehensive event planning and management; marketing plan development and implementation; branding and advertising; social media management; website management; survey development and distribution; and other client communication and administrative services.

Some of Tiffany’s projects and clients at The Firefly Group include:

- Artists for a Cause
- Florida Ranches Calendar
- Keep Martin Beautiful
- Marine Electronics of the Treasure Coast
- Martin County Healthy Start Coalition
- Martin County Metropolitan Planning Organization, LRTP 2040
- Martin County Solid Waste Division
- Martin County Utilities – Septic to Sewer
- PD&E for FDOT, SR 714/SW Martin Highway, Martin County (Keith & Schnars)
- Piper’s Landing Yacht & Country Club
- SafeSpace
- Treasure Coast Wildlife Center
- Treasure Coast Wildlife Center, Poker Run Volunteer, Open House Volunteer, Ghoula Volunteer

Community Involvement

- Artists for a Cause, Dance for Food Event Volunteer, Singing with the Stars Event Volunteer
- Keep Martin Beautiful, Color Run Volunteer, Environmental Stewardship Awards Volunteer, Great American Cleanup Volunteer, International Coastal Cleanup Volunteer
- Treasure Coast Wildlife Center, Poker Run Volunteer, Open House Volunteer, Ghoula Volunteer

Education

Tiffany has a Bachelor of Arts degree in Business Administration with a concentration in Marketing from Florida Atlantic University, Boca Raton, FL.

Skills

- Microsoft Office Suite – Word, Excel, PowerPoint, Publisher, Prezi
- E-mail marketing – Constant Contact, MailChimp, Vertical Response Website management systems – Simply Blue
- Social Media – Facebook page management and Ad campaigns, Hootsuite, Twitter, Instagram Adobe CS6 Suite – Photoshop
Melissa Zolla is the “Jar Tender” at The Firefly Group, though her more conventional title is Creative Director and Client Relationship Manager. Born in Neptune, New Jersey, and raised in Hobe Sound, Florida, Melissa has a unique work background and strong business ethics. Melissa’s previous employer was a renowned attorney for whom she successfully planned and executed high end special events and other community involvement initiatives. Guest attendance ranged from 500 to crowds as large as 15,000 and included government and business leaders and celebrities.

Melissa has more than 20 years of public involvement, strategic planning, community relations, event management and social media expertise. Her areas of focus at Firefly include: public relations project planning, comprehensive community outreach strategic planning, media relations, marketing, social media campaign strategy development and implementation, graphic design, collateral materials development and event management.

Melissa is an expert at stakeholder outreach and public involvement using grassroots strategies that include use of social media platforms. She is also accomplished in the areas of budget coordination and management, timelines and logistics, volunteer recruitment and coordination and non-profit fundraising events for which she has received numerous awards.

**Key government projects include:**

- Martin County Bathtub Reef Beach Renourishment Project
- Martin County Manatee Pocket Dredging Project
- South Florida Water Management District – EAA Reservoir Project
- Martin County Anchoring and Mooring Pilot Program
- Martin County Oyster Reef Restoration Project
- Martin County Inlet Dredging Project
- Martin County Metropolitan Planning Organizations, LRTP 2040 – Moving Martin Forward

**Scope of Services for those public outreach efforts included:**

- branding and logo design
- collateral materials development
- website and social media design, development and management
- stakeholder engagement, public meetings and workshop facilitation
Attachment C

IMPLEMENTATION SCHEDULE
The general timeline below provides a general schedule for the completion of services and deliverables as described previously in the Scope of Work. This timeline is subject to change and revision based on mutually agreed upon changing priorities.

**March 2020**

» Initial strategic planning meetings with team to create overall marketing and communications plan, messaging and branding, confirm implementation and rollout schedule

» Website and Social Media sites review and evaluation

» Constant Contact review and evaluation

» Review Council Agendas

» Begin Social Media monitoring

» Two weekly phone strategy meetings

» Set up analytics reporting format

**April 2020**

» Stakeholder engagement and outreach

» Press release development and distribution

» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed

» Email Communication development and distribution

» Review website for potential updates and advise

» Online/Print Media tracking and reporting

» Review Council Agendas

» Two weekly phone strategy meetings

» Monitor 12 month calendar; Communications analytics & reporting

**May 2020**

» Stakeholder engagement and outreach

» Press release development and distribution

» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed

» Email Communication development and distribution

» Review website for potential updates and advise

» Online/Print Media tracking and reporting

» Review Council Agendas

» Two weekly phone strategy meetings

» Monitor 12 month calendar; Communications analytics & reporting
June 2020
» Strategic planning meeting with team
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

July 2020
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

August 2020
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting
Sept 2020
» Strategic planning meeting with team
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

Oct 2020
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

Nov 2020
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting
Dec 2020
» Strategic planning meeting with team
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

Jan 2021
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting

Feb 2021
» Stakeholder engagement and outreach
» Press release development and distribution
» Social Media content curation, posting, sharing, monitoring, responses and engagement as needed
» Email Communication development and distribution
» Review website for potential updates and advise
» Online/Print Media tracking and reporting
» Review Council Agendas
» Two weekly phone strategy meetings
» Monitor 12 month calendar; Communications analytics & reporting
Attachment D

CLIENT COLLATERAL
Client Collateral Example #1

Martin County Board of County Commissioners
Martin County Utilities and Solid Waste
Client Collateral Example #2

Martin County Board of County Commissioners
Bathtub Beach/Sailfish Point Beach Renourishment
Client Collateral Example #3

Martin County Board of County Commissioners
Martin County Utilities and Solid Waste
Client Collateral Example #4

Keep Martin Beautiful
Client Collateral Example #5

St. Lucie County Economic Development Council

2016 Sponsorship Opportunities & Event Information

LEADERS on the LINKS

Friday, December 2, 2016
Golf Tournament & Cocktail Party

St. Lucie EDC

Why invest in the EDC?

Investment in the EDC is an asset in our community.

LEADERSHIP + INSPRIRATION + PARTNERSHIP

St. Lucie EDC

St. Lucie EDC

Economic Development Council of St. Lucie County

Join us.

St. Lucie EDC

Join us.

St. Lucie EDC

Join us.

St. Lucie EDC

Join us.

St. Lucie EDC

Join us.

St. Lucie EDC

Join us.
Client Collateral Example #6

The Banner Lake Club

The Banner Lake Club's mission is to improve the quality of life for Hobe Sound residents, especially those in the Banner Lake Community requiring financial, social, and educational support.

www.TheBannerLakeClubInc.org

TUESDAY, JANUARY 7, 2020
5:00 P.M. - 6:30 P.M.

BANNER LAKE COMMUNITY CENTER
12212 SE Lantana Ave • Hobe Sound, FL 33475

Please join us for tours of our new Community Center. Learn about our expanded programming and our new Academy. Refreshments will be served.

ALL ARE WELCOME!
Client Collateral Example #7

Martin County Metropolitan Planning Organization

Moving Martin Forward
Connectivity. Mobility. Livability.

The Martin MPO Needs to Hear From YOU!

Does it need maintenance or widening?

Is it a route that needs a sidewalk?

Is there a need for bike lanes?

Can you park your bike near your workplace?

Can you ride your bike to the beach?

Does it need new sidewalks?

What is the need for bike trails?

How do we make Martin County bicycle friendly?

Tell us how you think we can improve our transportation system?

We want to hear your ideas and suggestions on how we can improve our transportation system.

Please visit our website at www.martinfl.com for more information.

Martin MPO
Martin County

Moving Martin Forward

Bicycles
Future
Buses
Martin

February 13, 2020
Response:
Village of Indiantown Communications Consultant
Bid# RFP-001-0-2020/HB
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References: 5, 6

Letter of Transmittal: Enclosed

Certificate of Insurance: Enclosed
Executive Summary

Upstairs Communications specializes in creating and executing communication strategies—including copywriting, collateral creation, community coordination, outreach campaigns, crisis communications, and earned press coverage—founded on clear, concise and compelling messaging. In performing the services outlined in the RFP—including regular updates with Village personnel, keeping up with the Council agenda, monitoring the news cycle, developing and executing a communications calendar, measuring progress of outreach, building relationships, providing social media advice, guidance and posts, prepare press releases, develop email communications, support Village initiatives, and provide crisis communications—please know we pursue core, primary intents of all communication campaigns. For the Village, that would include establishing a consistent source for relevant and reliable information; reaching, informing and engaging the public; providing accuracy, clarity and credibility during a crisis; and earning and maintaining overall public confidence in an organization’s leadership, direction and undertakings.
Questionnaire Responses

Company and General Information:

Upstairs Communications International LLC is located at 7423 Belle Maison Dr., Stuart FL, 34997. Primary contact: Ike Crumpler, president and CEO of Upstairs Communications International, LLC. (772) 201-9996, ike@upstairscommunications.com; ikecrumpler@gmail.com

Qualifications and experience of firm and relevant team member:

Founded in 2010, Upstairs Communications provides public relations, media relations, governmental affairs and marketing services, representing a broad array of notable public, private, and nonprofit entities. With two fulltime employees and small cadre of trusted subcontractors for graphic design and photography, we provide individualized attention, rapid response, sound media and political counsel, and strategic creativity—in messaging, copywriting, collateral creation, community coordination, outreach campaigns, crisis communications, and earned press coverage.

Generalized Scope of Services:

- Strategic Communications
- Media Relations
- Public Relations
- Media Training
- Crisis Management
- Governmental Affairs
- Spokesperson Cultivation
- Guest Editorials
- Information Campaigns
- Presentation Creation/Refinement
- Speechwriting
- Social-Media Management
- Collateral Creation
- Talking Points/Slogans/Positioning Lines
- Community Organization
- Press Releases

Company structure:

- Ike Crumpler, president and CEO
- Paula Crumpler, CFO
- Creative Design, Melinda Brault of Geminye Design Group (subcontractor)

Please note: Ike Crumpler would serve exclusively serve in this role and remain the sole source to address any of the Village’s communications needs as specified in this agreement.

Our rate is $175 an hour and we estimate 11 hours per month on this effort rounded off at the slightly reduced rate of $2,000 per month.
Upstairs Communications specializes comprehensive communication strategies and services for our clients, crafting—often from scratch—complex informational campaigns and bearing responsibility for execution and outcome. We have a prolific record working with multiple government agencies in Martin County, and past and present governmental clients include the City of Stuart, the Town of Jupiter Island, Martin County Supervisors of Elections, the Business Development Board of Martin County and the Martin County School District.

Thanks to our journalism background and close relationships with members of the regional print and broadcast news outlets, we’re experienced in attaining—and carefully managing—media coverage to best position our subject matter for clarity and comprehension.

**Responses to Scope of Services:**

As a communications consultant for the Village of Indiantown, Upstairs Communications would assist the Village Council and Village Manager in organizing communication strategies with the overarching goals of:

- Ensuring transparency and demonstrating strong accountability to the public;
- Improving responsiveness to citizen concerns;
- Providing reliable updates on public-safety matters, construction projects and road closures;
- Encouraging public participation in meetings and workshops and citizen service on advisory boards and committees.
- Clarifying details of initiatives and policies.
- Targeting specific demographics—investors, event attendees, etc.—as circumstances and initiatives necessitate.

**Fees:**

We propose a monthly agreement of $2,000 remaining committed to 11 hours of service. All items performed are detailed in monthly invoices with payment request via check at the end of the month. For more in-depth initiatives exceeding the allotted hours of service, we would refer to our $175 hourly rate after first providing advance estimates on the time involved.

We can also create supporting collateral creation (e.g. postcards, newsletters, brochures, websites, videos, mailers, email campaign, etc.) that may be needed. Such services carry hard costs and would entail separate cost estimates.

**References:**

- Angela Hoffman, president of the Business Development Board of Martin County, chief executive officer of the Boys & Girls Clubs of Martin County, former executive director of the Hobe Sound Chamber of Commerce – (561) 632-0094.

Work experience: Upstairs Communications is currently providing communications for Business Development Board of Martin County (December 2019-current) and Boys &
Girls Clubs of Martin County (July 2019-current); multiple projects on behalf of or in conjunction with Hobe Sound Chamber from 2014-2018.

- Vicki Davis, Martin County supervisor of elections – (772) 288-5637. Work experience: Multiple and ongoing communication projects since early 2012.


**Implementation Schedule:**

Tangible examples of the ways in which Upstairs Communications would help accomplish these goals—to begin immediately upon hiring—include:

- **March – ongoing:** Crafting a communications plan that establishes a set structure for communicating clearly and consistently across multiple media platforms, including the Village website, social media and through regular and ongoing email communications with residents, constituents, visitors and potential investors in everyday circumstances as well as in crisis events.

- **March and reoccurring monthly:** Producing—and creating and managing a strategy for broadening and increasing circulation—regular newsletters to detail Village initiatives, reflect resident priorities, highlight important happenings around town, publicly introduce key Village personnel and showcase notable staff performances.

- **May/June:** Helping organize and promote listening sessions to gather constituent input and advance understanding about Council initiatives and policies.

- **Ongoing:** Writing press releases, pitching press and driving and managing media coverage to ensure clear communication of important Village achievements, undertakings and newsworthy items.

- **Ongoing:** Assisting with social media messaging and outreach.

- **Ongoing:** Organizing, assembling and promoting details on community events and happenings.

- **Ongoing:** Assisting as needed with the creation, promotion and outreach of special projects, e.g., public-safety initiatives, advancing employment and entrepreneurial opportunities for Village residents, highlighting select investment opportunities, comprehensive planning process.
AGENDA ITEM TITLE: RFP# 002-2020-HB - Lobbyist Services:
Presentation by Short-Listed Firms & Selection of Lobbying Firm

SUMMARY OF ITEM: On January 3, 2020, the Village issued Request for Proposals (RFP) #002-2020-HB for Lobbying Services. The Village received three proposals in response to said RFP.

The Selection Committee members reviewed each of the three proposals in detail and met on January 29, 2020, to discuss and rank the proposals. Below is the final ranking of the proposals:

1. CAS Governmental Services - 188 points
2. Gray-Robinson - 166 points
3. JEJ & Associates - 161 points

All proposers will be making brief presentations to the Village Council and will answer any questions regarding the provision of their services.

RECOMMENDATION: Staff recommends that the Village Council accept the proposers' presentations, select their top-ranked firm and authorize the Village Manager and/or Village Attorney to enter into negotiations with said firm.

PREPARED BY: Susan A. Owens, MPA, MMC, Village Clerk

ATTACHMENTS:
Description
CAS Governmental Services' Proposal
Gray-Robinson's Proposal
JEJ & Associates' Proposal

DATE: 2/4/2020
REQUEST FOR PROPOSALS
LOBBYIST SERVICES
RFP #2020-002-HB
January 3, 2020

Village of Indiantown

VILLAGE MANAGER'S OFFICE
P.O. Box 398
Indiantown, FL 34956

Mayor Guyton Stone
Vice Mayor Janet Hernández
Council Member Anthony Dowling
Council Member Jackie Gary Clarke
Council Member Susan Gibbs Thomas
Village Manager Howard W. Brown, Jr.

Proposer:
CAS Governmental Services, LLC
Post Office Box 35
36910 3rd Street
Canal Point, Florida 33438
561-924-7702
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TAB 1
EXECUTIVE SUMMARY
LETTER OF INTEREST
SIGNED ADDENDUM #1
January 27, 2020

Village of Indiantown
Mayor, Council, and Manager
16550 SW Warfield Blvd.
Indiantown, Florida 34956

RE: RFP No. 2020-002-HB Requests for Proposals for Lobbyist Services

Dear Mayor, Council and Manager:

We are pleased to respond to your RFP Number 2020-002-HB – Lobbyists, and we are qualified and staffed to meet your needs as outlined in the RFP. As President and Managing Member of CAS Governmental Services, LLC, I am authorized to bind the firm. We have read and will comply with all terms and conditions of the RFP.

CAS Governmental Services, LLC (CASGS) and our Legislative Lobbying Team consist of the three principles of the firm, M. Dale Milita, Connie C. Vanassche and James R. Spratt. Working in association with CASGS, we also have Richard Coates, Esq. and Shelley Green of Tidewater Consulting, Inc. and James A. Naff of James A. Naff and Associates in Tallahassee. Tidewater Consulting brings an in-depth skill set to the CASGS Legislative Lobby Team because of their excellent relationships with the leadership of the Legislative and Executive Branches and detail to issues and policy. Naff and Associates is well known for in-depth work with State agencies because of his many years of service with different Florida State departments. He brings significant insight and valuable resources to the entire team.

Dale, Connie and Jim have a proven track record and are successful in providing small local governments with tens of millions of dollars in unanticipated revenue through lobbying services for over 15 years in the South Florida, South Central Florida and in Southwest Florida areas, and particularly in the Polk, Hardee, Glades, Okeechobee, Broward and Western Palm Beach Counties.

We began as an in-house departmental division of a professional engineering company in Pompano Beach, Florida, subsequently becoming very successful in providing direct assistance in acquiring appropriations, representing legislative issues and grant funding for our clients. Because of this success, we were solicited by others, not clients of the engineering firm, to assist in both the appropriation/grant acquisition arena and local legislative issues. Since then we separated from the engineering firm and have become a fully separate firm. Our company name CAS Governmental Services, LLC (CASGS), means Communication Advocacy Specialists.
We now provide services, almost exclusively, to small rural local governments, cities, counties, special districts and utility authorities.

Our statewide legislative network will support and augment those you already have in place representing the Village of Indiantown. Because of our wide array of legislative resources acquired over the years, we will bring to the Village of Indiantown the ability to network many other State Senators and State Representatives, culminating in a wider representation of the issues that matter most to your Village. The CASGS Legislative Lobby Team has first-hand knowledge in local government, and in your region with both the Florida Senate and Florida House of Representatives.

I have personally served as a City Manager, a County Manager and a Special Healthcare Tax District Administrator. Also working closely with me, full time, is Jim Spratt and Connie Vanassche.

Jim Spratt is CASGS Vice President, Principle and registered lobbyist. Jim has a unique and outstanding ability with the State Legislative Appropriations process, however, he has not only that type of knowledge. Jim is one of the few people in the entire State of Florida that knows and understands the entire Florida Legislative process. This type of knowledge is invaluable.

Connie Vanassche, CASGS Vice President, Principle and registered lobbyist, brings the knowledge, services and technical aspects to the Legislative Lobby Team. She is not only a very capable lobbyist, but she knows and understands what it takes to keep the client's project eligible for repeat funding year after year, as is shown in “Networking 101” (see Tab 7). We refer to this valuable resource as being able to “Obtain and Maintain” funding sources.

We have been especially successful in local issues and project funding. We take pride in that we have been able to successfully assist local governments in your area in fund acquisitions in the past. We take our clients' legislative issues on as a personal cause and will defend favorable legislation and fight against unfavorable legislation for the Village of Indiantown. We can work closely with not only Martin County, as may be appropriate or as directed, and your Legislative Delegation, but we can also network your issues to the many other Senators and Representatives to further ensure both a thorough and competent representation of the Village's priorities.

We are stationed in Tallahassee during all Legislative Committee Weeks and we are in Tallahassee full-time during the entire Legislative Sessions and will also be available during special sessions, as needed or directed.
The CAS Governmental Services Lobbying and Grant Networking Team is second to none in accomplishment, and personal first-hand knowledge of the needs of small rural local government needs and issues.

Because of our hands-on experience in both the legislative and local government sectors, especially in the rural areas of Florida, CASGS will not require the learning curve that others must take time to acquire; we can and will “hit the road running”. We know and understand municipal needs in rural small local government from both sides of the podium.

We can, as directed by the Village, assist with initial planning, draft legislation, before and during committee agendas, monitor favorable and unfavorable legislation and prepare draft amendments at your authorization/direction.

We will present your legislation and provide testimony as needed throughout the legislative process. We work well with others that you may have as a legislative team, such as the Florida League of Cities. However, we also know that a “cookie-cutter” approach does not always work for you, and in those instances, we are prepared to submit changes in association policies to protect the Village of Indiantown.

Our services in following the items 1 – 10 on page numbers 1 and 2 of the RFP packets are available to your municipality on a lump-sum amount or on a retainer/cost-plus basis, as may be negotiated after award of contractual arrangement. We will tailor fit our services and costs to your needs.

The CASGS Team of Legislative Lobbyists can provide the Village of Indiantown with full-service, from the inception of your issues or projects all the way through the legislative committee week and legislative session process, including assistance with appropriate agencies of the State.

We look forward to working with you and representing the Village of Indiantown issues.

Sincerely,

CAS GOVERNMENTAL SERVICES, LLC

M. Dale Milita
President
~ CERTIFICATION OF RECEIPT OF ADDENDUM ~
(This signed addendum MUST be included in your/your firm’s proposal.)

I, the undersigned, do hereby certify that I/my firm have/has received of copy of RFP-2020-002-HB—Addendum #1, issued on January 21, 2020, by the Village of Indiantown.

Signature of Authorized Representative
M. Dale

Individual/Firm Name
CAS Governmental Services, LLC

Printed Name of Authorized Representative
M. Dale

Date
January 22, 2020
ADDENDUM #1 TO RFP #2020-002-HB – Lobbyist Services

January 21, 2020

To All Prospective Proposers,

Please be advised that the following question(s) have been received in response to RFP #2020-002-HB—Lobbyist Services. In response to these questions, we are issuing this official Addendum.

IMPORTANT: Please be sure to sign at the designated location at the end of this addendum, certifying receipt of this addendum, AND include a copy of the signed addendum in your proposal. Failure to include this signed confirmation of receipt shall disqualify you/your firm from further consideration.

1. What is your one year budget for Lobbyist Services?
   $50,000.00

2. Is it correct to read this as a request for state lobbying support only?
   Yes, but services to be provided are not limited to what was stated in the request summary section of the RFP.

3. How often do you anticipate wanting a representative from the chosen firm on site in Indiantown? Is there a meeting schedule, or will it be on an ad hoc basis?
   It will be on an ad hoc basis, with a minimum of three (3) meetings.

4. On page 2, D RFP Questions, it says "All firms registered for the RFP will receive responses to questions and any addenda that may be released, via e-mail by Tuesday, January 21, 2020." Is there a process by which we must register, if so please guide me as to where I can obtain that information?
   As long as you are a planholder on Demand Star, the system will automatically email you any updates, including any responses to questions and/or addenda.

5. I did not see any comment from the Village as to preference in packaging of the Proposals (i.e. 3 hole punch notebooks etc.)
   The four (4) individual hard copies (1 color original and 3 copies) of the proposal can be individually bound/packaged/presented in any manner; however, all of the copies must be submitted in a sealed envelope, box, etc.

(See Next Page for Required Certification of Receipt of Addendum)
TAB 2

QUESTIONNAIRE
A. COMPANY NAME AND GENERAL INFORMATION

1. COMPANY NAME AND ADDRESS:
   CAS Governmental Services, LLC
   Post Office Box 35
   Canal Point, Florida 33438

2. Letter of Transmittal/Interest/Executive Summary - (See Tab 1)

3. Contact:  M. Dale Milita, President  
              561-924-7702 (Office)  
              561-718-2100 (Cellular)  
              Email Address: casgovser@gmail.com

B. QUALIFICATIONS AND EXPERIENCE OF THE FIRM

1. Describe your firm's history and organizational structure. Include the size of the firm, location of offices, years in business, organizational chart, name(s) of owner(s) and principal parties, and number and position titles of staff.

   CAS (Communication Advocacy Specialists) Governmental Services, LLC (CASGS) was formed in June of 2011; it was however, a fully active Lobbying and Grants firm for over 20 years that was formerly associated with a professional engineering firm. The newly formed CASGS lobbyists and grants specialists, all of whom have worked together as a team, were awarded the contracts already in force in order to provide exceptional strategic legislative lobbying and consulting services including Appropriations, Networking of Grants, and Grants Assistance, (See Tab 4).

   CASGS is a partnership that offers full service governmental consulting services, with specialties in small, rural local governmental entities.

   There are three (3) principals-owners, all are registered lobbyists:
   • President – M. Dale Milita
   • Vice-President - Connie C. Vanassche
   • Vice-President – James R. Spratt

   Our offices are located in Canal Point, Florida and in Tallahassee, Florida.

2. What is the primary business of the parent company and/or affiliates?

   Our firm specializes in consulting and lobbying services, primarily for small rural local governments, and grant acquisition and administration.
3. Which office(s) of your organization will have primary responsibility for managing this account? List the members of your team who will be responsible for providing the services and for ongoing support. Describe the duties of these team members.

The Canal Point Office is responsible during Non-Legislative Session and responsibility shifts to Tallahassee during Legislative Session.

James R. Spratt, Vice President and Legislative Manager, will be the point person for the Village. Connie Vanassche and Dale Milita are available and will assist in every way to make the Village’s legislative process a success, because each CASGS Lobby Team Member is a registered lobbyist and they operate in a team manner accomplishing the Village’s interests.

4. Provide the estimated number of hours (weekly) and billing rate for each consultant team member providing services.

The total estimated number of hours (weekly) may not be applicable due to our lump sum contracts, however, our hourly rate for items you may direct that are not included in our agreement is $125.00 per hour. Each of the CASGS Lobbyists have the same billing rate.

5. What is your firm’s experience conducting the services requested? Describe comparable services performed by your firm in the last five years, including the number of accounts, scope of service, and their status.

GASGS has thirteen (13) clients and between those clients, they have 184 years of services with the firm. We believe it speaks highly to have long-term business relationships.

The status of each of these clients in this long-term relationship are active and we are under contract with each entity. Some of our clientele have greater interest in fund acquisitions through the Special Legislative Appropriations and others have the need for legislation, and special legislative amendments. Also, during the off-Session times of the year, we have arranged and escorted local officials and staff to meetings with their legislators and also, we have facilitated meetings with key agencies for them.

Our scope of service for each client is relatively similar except that several have found our grant administration services are absolutely accurate and timely. The fact that as a part of our grant administration services, we monitor those doing project work that is paid for with grant funds to keep the progress reports, payment requests, record keeping, etc. in compliance. All of this, mainly our
maintaining an on-time and within budget parameter keeps our clients in compliance and eligible for the next phase-cycle of funding.

Our success rate for municipalities for fund acquisition over the last five years has been in excess of $27,000,000.00 for small and rural local governments. All of these funds were from FDEP and Legislative Appropriations. With no local match required.

6. Comment on other areas that may make your firm different from your competitors.

CAS Governmental Services, LLC is different from other lobbying firms. We are not a here today and gone tomorrow firm, we have long-term relationships in order to fully know and understand our clients’ needs and how we can best help outside the box, so to speak. Our primary business is Lobbying, Networking of Grants and Grant Administration.

We don’t just talk about utilizing one funding source to match another one, WE DO IT! CASGS developed the “Networking 101” process, others try it, but we are able to do it. (See Tab 7 – Grants & Networking)

We can and will be as visual as one of your employees or as invisible as someone in the back room of accounting with a lamp, sleeve garter, green visor and quill pen working the midnight shift. That is why some clients refer to us as governmental assistants.

CASGS is available to assist with before delegation planning, presentation preparation, Legislative Committee Weeks and Legislative Session participation as Florida Registered Lobbyists, Appropriation and Funding Acquisitions, preparation of language for amendments for legislation, and monitoring of committees. Grant preparation and administration of appropriations and grants as may be negotiated. Federal lobbyist assistance is available through affiliated Washington D.C. based consultants.

C. QUALIFICATIONS AND EXPERIENCE OF PROPOSED PROJECT TEAM:

1. Describe the qualifications of staff proposed for the assignment, position(s) in the firm, and types and amount of equivalent experience. Be sure to include any municipal agencies they have worked with in the past three years and their level of involvement. A description of how overall supervision will be provided should be included.
CASGS has three (3) full-time State Registered Lobbyists that are Principals, and Partners in the firm. We have extensive municipal experience, which is depicted on our Reputation and Client References document (See Tab 9). We have long-term relationships with our clients and as principals and partners, we are actively engaged day to day with our client's issues.

Our Lobby Team also includes in association with Richard E. Coates, Esq., and Shelley B. Green of Tidewater Consulting, Inc. and with James A. Naff of James A. Naff & Associates. (See Tab 4)

2. Identify and provide the resume(s) of the personnel who will be assigned to this project.
   - M. Dale Milita, President will be the primary contact for the contract.
   - James R. Spratt, Vice President and Legislative Director is assigned as your Legislative Manager and
   - Connie Vanassche, Vice President will be the Operations Manager.

D. QUESTIONS/RESPONSE TO SCOPE OF SERVICES

1. Describe the methods by which your firm will fulfill the services requested in the Scope of Services and subsequent sections.
   - See Tab 5: Scope of Services
   - See Tab 6: Summary of Qualifications, Florida Small and Rural Community Experience.

2. Provide a statement of the services(s) that differentiate your firm from other respondents.

E. FEES

1. Provide your fees for the proposed services. Fee quotes should be detailed by service.
   - See Tab 8: Fees -- Fee Schedule

2. Outline billing and payment expectations, including timing and method of payment.
   - Services are invoiced monthly. Payment is due in 30 days and payable by check.

3. Describe any remaining fees not previously detailed in the above, i.e., for ad-hoc services.
   - The CASGS standard and usual method of services outside of the scope of services are invoiced at our hourly rate. See Tab 8 - Fee Schedule.
F. REFERENCES
   • See Tab 9: Reputation and Client References

G. IMPLEMENTATION SCHEDULE
   Include a detailed implementation schedule with an estimated start date of March 1, 2020 and note key milestones and timelines for deliverables. Identify any assumptions used in developing the schedule.
   • See Tab 10: Project Approach

H. CERTIFICATE OF INSURANCE
   • CASGS will provide Certificate of Insurance addressing the Village’s coverage types and minimum limits.

I. BUSINESS TAX CERTIFICATE
   • CASGS will acquire a Village of Indiantown Business Tax Certificate upon award.
TAB 3
ATTACHMENTS
ATTACHMENTS

4. E. ATTACHMENTS:

TAB 1 – Executive Summary – Letter of Interest
Signed Addendum #1

TAB 2 – Questionnaire/Response to Scope of Services

TAB 4 – Background/History/Team, Team Chart, Resumes
(addresses Questionnaire B. 1 and C. 2.)

TAB 5: Scope of Services
(addresses Questionnaire C. 1, D. 1)

TAB 6. Summary of Qualifications
(addresses Questionnaire B. 1 and C. 2.)

TAB 7: Grants & Networking, Networking of Grants and Other Funding,
Networking 101, Grants/Third-Party Funding
(addresses Questionnaire D. 2.)

TAB 8: Fees

TAB 9: References

TAB 10: Implementation Schedule – Project Approach
TAB 4
(Questionnaire B.1., C.2.)
BACKGROUND/HISTORY/TEAM
TEAM CHART
RESUMES
CAS (Communication Advocacy Specialists) Governmental Services, LLC (CASGS) was formed in June of 2011; it was however, a fully active Lobbying and Grants firm for over 20 years that was formerly associated with a professional engineering firm. The newly formed CASGS lobbyists and grants specialists were awarded the contracts already in force in order to provide exceptional strategic legislative lobbying and consulting services including Appropriations, Networking of Grants, and Grants Assistance. CASGS' many years of experience includes very successful fund acquisition and legislative issue resolutions for local governments, utility authorities, special taxing districts and associations.

The principals of CASGS include M. Dale Milita, the firm's President and a Registered Florida Lobbyist; Connie Vanassche, Vice President, a Registered Florida Lobbyist; and James R. Spratt, Vice President and Registered Florida Lobbyist.

- **M. Dale Milita** has vast experience from both sides of the lectern, so to speak. He has served as a City Manager and County Manager and a Special Health Care Tax District Administrator. Dale knows and understands the importance of getting the task done, keeping his principals informed and ensuring that funding objectives are top priorities.

- **Connie C. Vanassche** brings not only the additional in-depth lobbying services for CASGS clients, but also unique and special expertise that will enhance the networking of your projects and allow for additional funding for the Village. Connie oversees the entire CASGS operations and works with Staff throughout the year. Connie's work includes an exceptional monitoring process of the funding requirements to assure the Village's eligibility for future funding cycles.

- **James R. Spratt** serves as CASGS Director of Legislative Services and works from Tallahassee. Jim brings over 15 years' experience to the team. Jim has a long family history in public service and the political process. His grandfather, J. R. Spratt, served in the Florida House of Representatives in the 1960s and his father, J.R. Spratt, Jr., served in the Florida House of Representatives (1996-2004). Jim has earned the highest level of respect from Florida's elected officials, State agencies and colleagues in the lobbying corp. It is because of these relationships and experience Jim brings to the table for every client as they discuss their political goals and issues.
CAS GS will adapt schedules to assign adequate time, including drawing more staff to your Tallahassee issues in order to accomplish the tasks before us. We stand ready to make your projects become reality.

CAS GS also works closely, in association with the most respected governmental services firms – Tidewater Consulting, Inc. with Richard E. Coates, Esq. and Shelley B. Green and James A. Naff of James A. Naff & Associates. CAS GS has created a network of other professional individuals and we work together opening doors cumulatively that may have not been as accessible individually. This highly qualified-skilled Legislative Lobby Team possess a wealth of knowledge and brings to the table diverse backgrounds and longevity of unique experiences and the passion to honorably represent the Village of Indiantown.

CAS GS represents primarily small, rural local governments, utility authorities, associations and special districts and because of our specific knowledge, diverse backgrounds and experiences; we believe that the CAS GS Lobby Team is best suited to represent the Village of Indiantown with your needs in Tallahassee.

"We are large enough to carry out all services you need and We're small enough to know and understand the needs of small rural local government."
M. Dale Milita, President
Communication Advocacy Specialists Governmental Services, LLC

Professional Experience

CAS Governmental Services, LLC -- July 1, 2011 - Present
President /Managing Member/Principal

- Registered lobbyist, provides over-site and assists legislative services, grants administration services, assists with the operation of Governmental Services, coordinates workload and strategy with the firm’s VP’s. Provides business development and quality control. Provides special lobbying assistance in Tallahassee and Washington, as needed.

Owner-Partner-Vice President

- Governmental Affairs Consultant responsible for coordinating lobbying efforts, business development, provide grants administration services over-site for the Governmental Services Division clientele, assists the overall Governmental Services Operations, coordinates with the Legislative Director and the President. Provided special lobbying assistance in Tallahassee and Washington. Serves as the firm’s liaison to governmental services clients.

Okeechobee County, Florida -- 1989 – 1992
County Manager

- Hired as County Administrative Assistant and Planner for Okeechobee County and was designated by the Board of County Commissioners as the first ever County Manager. Responsible for the daily operation of the County Government. This included preparation of the County Budget, with assistance from the County Treasurer. Responsibilities included Fire Services, EMS Services, Recreation, Library, Road and Bridge, Engineering, Solid Waste Services, Veterans Affairs Office, Welfare, Extension Services, Civil Defense, Cemetery, Maintenance, Custodial services, Planning/Zoning/Building Department, Okee-Tantie Recreational Park, Liaison to Humane Society and Council on Aging, Grant preparation and administration, legislative appropriations and lobbying.

City of Pahokee, Florida – 1988 – 1989
Pahokee, Florida

- City Manager, direct responsibility for eighty (80) employees. As City Manager was responsible for Police Department, Fire Services, Library, Public Works, Potable Water Treatment, Wastewater Treatment, Planning/Zoning/Building, Code Enforcement, Grant Writing and administration, Operation of Lake Okeechobee Marina and Camp Ground.
Everglades Memorial Hospital Special Medical Taxing District – 1969 - 1988
Administrator

- As Hospital Administrator, was responsible for the direction of construction of hospital expansion. Directed Clinical Laboratory, Pathology, Blood Banking, Electrocardiography, Radiology, Nuclear Medicine, Ultrasound, Respiratory Care, Engineering Services, Maintenance, Environmental Services, Grant Writing, Resource Development, Communications, Emergency Medical Services, Risk Management, Quality Assurance and Accreditation.

Education

- Graduate - High School, Ladysmith, Virginia- 1960
- Graduate - Clinical Laboratory in Miami at Florida College of Medical Technology- 1963
- Attended Graduate School at the National Public Health Services, Washington, D.C.
  BS, Medical Technology Eqv.
- Graduate – Phillip Levine Research Center, Ortho Research Center, Raritan, N.J.
- State Certified Risk Manager - 1982
- State of Florida, Clinical Laboratory Supervisor License #JC0002976 - 1967
- Florida Teacher Certificate - 1973
James R. Spratt, Vice President
Communication Advocacy Specialists Governmental Services, LLC

Professional Experience

2012-present – CAS Governmental Services, LLC and Magnolia Strategies: Assist clients with a multitude of issues including: Local Government Appropriations and Legislative Issues and Legislative Policy, Agricultural and Environmental Policy, Sales Tax, Transportation and Appropriations issues before the Florida Legislature. On an issue specific basis assist client with federal issues including: immigration/ labor, farm bill, movement of products. Also, provided limited campaign consulting and management.

2004-2012 – Florida Nursery, Growers and Landscape Association (FNGLA): Water and Environmental Policy issues, water management district issues, local government policy work (landscapes, irrigation, fertilization) ordinances, property and sales tax issues, grassroots advocacy and government affairs

Florida Department of Agriculture and Consumer Services,
Office of Agricultural Water Policy
Water Policy issues, consumptive use permitting, water quality issues, development of agricultural Best Management Practices (BMPs), chapter 120 rule making process to successfully adopt (BMPs) by rule.

Education

- University of Florida, College of Agriculture and Life Sciences, BS Environmental Horticulture; minor(s) Agricultural Law; Food and Resource Economics
- Edison State College, AA degree
- University of South Florida
Connie C. Vanassche, Vice President
Communication Advocacy Specialists Governmental Services, LLC

Professional Experience

CAS Governmental Services, LLC -- July 1, 2011-Present
Vice President/Principal
- Registered lobbyist, provides Governmental Services Operations-Managing Member, grants administration services, coordinates with the Legislative Director and the firm's President. Provides business development and quality assurance services. Provides in-depth lobbying assistance in Tallahassee and Washington, as appropriate and or needed.

Craig A. Smith & Associates, Inc. Governmental Services Division -- 2008-June 2011
Assistant Vice President
- Registered lobbyist, provided grants administration services to the Governmental Services Division clientele, assists with the Governmental Services Operations, coordinates with the Legislative Director and the firm's President. Provided business development and quality assurance services, special lobbying assistance in Tallahassee and Washington, and served as the firm's liaison to governmental services clients.

Craig A. Smith & Associates Engineering -- 1998-2008
Division Manager
- Authority and responsibility for the operation of the company's satellite offices.

Palm Beach County School District -- 1996-1998
Teacher Assistant
- Acreage Pines Community Elementary School
- Golden Grove Community Elementary School

Smith & Knibbs, Inc. -- 1979-1990
Office Manager
- Started with company at its inception. Responsible for all office criteria. Responsibilities increased as company grew from three to 13 employees. Implemented policy and procedures manuals; self-educated on computers and software.

The Communications Group – 1975-1979
Production Manager
- Hired as the receptionist and quickly advanced to Production Manager responsible for the production and distribution of client-related press releases, coordination of copy with local daily papers, photography selection and production, printing and coordinating with 50 account executives and company accounts.

Education
- High School, Plantation, Florida
- Certified Professional Secretary (CPS), 1984
- Broward Community College, Fort Lauderdale, Florida
Established in 1998, Tidewater is a full-service firm, offering lobbying services, policy advocacy, and regulatory and administrative assistance. Tidewater’s history and track record place it among the finest of professional, high-quality Tallahassee firms.

Tidewater has created a tradition of exceeding customer expectations. Our passion for providing an excellent customer experience is exemplified in every action of the process from proposal to client service delivery.

The firm’s members are uniquely qualified to represent clients through proven experience, unrivaled contacts in Florida’s government and extensive ties to many areas throughout Florida. Tidewater’s members possess a wealth of political knowledge and experience including Legislative and Executive Branch lobbying, campaign coordination and management, grassroots issue campaigns and political strategizing. The diverse and varied backgrounds of the team lend Tidewater insight into issues affecting its clients and the ability to craft innovative solutions.

Tidewater enjoys excellent relationships with the leadership of the Florida Senate and House of Representatives, as well as with the membership in general. In addition, Tidewater has long-standing affiliations with members of Florida’s Cabinet and with the Governor’s Department and Agency heads. Additionally, Tidewater has notable relations with key personnel in the Governor’s office, as well as the Governor himself. We continually bolster our knowledge of state government by cultivating associations with new Legislative members and their staff, along with governmental agencies’ heads and staff. These relationships are an important component to successfully serving our clients.
ABOUT TIDEWATER CONSULTING, INC.

Tidewater has extensive experience in representation of clients before the Florida Legislature, Governor and Cabinet, the Federal Government, as well as local governments. During any given election cycle, members of Tidewater work to create success for many campaigns at the Federal, State and local levels. This vast experience and knowledge makes Tidewater uniquely positioned to assist clients with its governmental agenda.

As a full-service lobbying firm, Tidewater works by advising incumbent legislators on the complexities of the legislative process, the members of the firm are intimately involved with the inner workings of Florida’s governmental processes. The various backgrounds of the team afford Tidewater the opportunity to reach across party lines to create a coalition and successfully secure clients’ objectives.

We understand that the scope of work purposed by the client may change as priorities and agendas of legislative leadership emerge for the Legislative Session. Tidewater is able to adjust to changing agendas and can quickly adapt to directions provided by FIADA.

In addition to providing superior lobbying services, Tidewater’s access to and relationships with key decision-makers in Florida’s State Agencies allows the team to Sheppard clients’ issues cleanly through the regulatory maze. The Tidewater staff possesses vast knowledge of and experience in the innerworkings of state and local governments and knows how to accomplish the tasks set before them.

Tidewater’s members have played key roles in many past political campaigns. The team is highly knowledgeable in the area of election law and uniquely skilled in both directing and managing campaigns, from that of local races to statewide and federal.
Staff Profiles

Richard E. Coates has been lobbying on behalf of entities before the Legislative and Executive Branch of Florida for 35 years. Richard joined Tidewater Consulting, Inc. in February 2001 and serves as Tidewater’s President. Richard is also an attorney and a certified public accountant. Having established Coates Law Firm, PL in 2007, he specializes in election law and campaign finance. Before joining Tidewater, Richard was a shareholder at Katz, Kutter, Haigler, Alderman, Bryant & Yon, P.A., one of Tallahassee’s largest law firms. For nine years he worked for the Division of Florida Land Sales, Condominiums and Mobile Homes, Department of Business Regulation, including service as Division Director. Richard was also a sole proprietor of an accounting practice.

Richard also practices in the area of state taxation and regulated entities and this experience brings a wealth of knowledge to his clients’ issues. Richard’s past legislative experience includes representing the Division of Florida Land Sales, while he was employed there. More recently, he has represented insurance and telecommunication companies, the space industry, private colleges, high-speed rail and many other business interests.

Richard received his Juris Doctorate from Florida State University in 1991, his Masters of Accounting in 1979 and B.S. in Accounting in 1977. Richard is a member of the Tax Section of the Florida, the American Bar Association, the Florida Institute of Certified Public Accountants and the Republican National Lawyers Association.

Richard is a 30-plus year resident of Tallahassee, Florida, and is married to Candy McKinney Coates with two children, Mason and Caitlyn.
Shelley B. Green has been a partner with Tidewater Consulting, Inc. since its formation in January of 1998, bringing 25 years of experience in the political arena to the firm. Previously she served as Executive Assistant to the Chairman and Special Events Coordinator at the Republican Party of Florida from May 1994 to January 1999. She played a key role in the Party’s successful 1995 Presidency III straw poll convention and the 1996 Republican National Convention.

A native Floridian, Shelley was born and raised in Jacksonville. She attended the Florida Community College of Jacksonville on full academic scholarship and graduated from the Florida State University in 1994 with a Bachelor of Arts degree in International Affairs/Political Science. In 2001, Mrs. Green obtained her Master of Social Science degree in Executive Management, from the Florida State University.

Shelley began her career in the political arena by interning in the Tallahassee office of U.S. Senator Connie Mack. She then served in dual capacity as the Executive Assistant to the Chairman and Special Events Coordinator at the Republican Party of Florida during a period of time which saw unrivaled growth and expansion of the Republican agenda in Florida.

Shelley is involved in numerous civic organizations including currently serving as President of the Tallahassee Alumnae Chapter of Delta Delta Delta and Treasurer of her HOA.

Shelley is a 27-year resident of Tallahassee, Florida, and is married to Christopher E. Green with three children, Jackson, Harrison, and Addison.
Tidewater Consulting, Inc. is proud to have provided our services to these fine companies, over the many years. We look forward to working with you as well.

**Broward County**
115 S Andrews Ave  
Ste 426  
Ft Lauderdale, FL 33301-1826

**Cigar Association**
1310 G Street, NW  
Suite 680  
Washington, DC 20005

**City of Bartow**
450 N Wilson Ave  
Bartow, FL 33830

**City of Belle Glade**
110 Doctor M.L.K. Jr Blvd W  
Belle Glade, FL 33430

**City of Moore Haven**
PO Box 399  
Moore Haven, FL 33471-0399

**City of Okeechobee**
55 SE 3rd Ave  
Okeechobee, FL 34974

**City of Wauchula**
126 S 7th Ave  
Wauchula, FL 33873

**City-County Public Works Authority**
PO Box 1221  
Moore Haven, FL 33471-1221

**First Data Corporation**
6200 S Quebec St., Ste 350  
Greenwood Village, CO 80111

**Full Sail University**
3300 University Blvd  
Winter Park, FL 32792

**Glades County Board of Commissioners**
PO Box 1527  
Moore Haven, FL 33471-1527

**Hardee County Board of County Commissioners**
412 W Orange St Rm A-203  
Wauchula, FL 33873-2831

**Okeechobee County Board of County Commissioners**
304 NW 2Nd St Rm 106  
Okeechobee, FL 34972-4146

**Okeechobee Utility Authority**
100 SW 5th Ave  
Okeechobee, FL 34974

**Shelton Fireworks**
P. O. Box 249  
Eagleville, MO 64442

**Town of Pembroke Park**
3150 SW 52nd Ave  
Pembroke Park, FL 33023

**Western Union**
12500 E Belford Ave M1G  
Englewood, CO 80112
Consultants for State Governmental Relations

✧ Reliable ✧ Innovative ✧ Experienced ✧

SPECIALTY AREAS OF SERVICE

Agriculture & Forestry
Appropriations
Banking & Finance
Business & Commerce
Communications
Development & Growth Management
Education
Elections & Campaign Management
Energy & Natural Resources
Environment
Gaming & Wagering
General Government
Healthcare
Insurance
Legal
Media & Public Relations
Natural Resources
Social Services
Taxation
Tourism
Transportation
Utilities
James A. Naff and Associates is owned and operated by Jim Naff. Founded in 2005, the firm specializes in water, environment, citrus, and agricultural policy and appropriations issues. Prior to forming James A. Naff and Associates, Naff completed more than 33 years of government service for the State of Florida which included serving as the Deputy Commissioner and Legislative Affairs Director of the Florida Department of Agriculture and Consumer Services and Assistant Executive Director for Administration in the Florida Department of Citrus. Naff joined Smith, Bryan & Myers (SBM) in 2005 as an affiliate with James A. Naff & Associates.

Since joining the firm, he has been very successful in the appropriations process where he has secured millions of dollars of state funding.

Within SBM, Jim's responsibilities include:

- Representation before the legislative and executive branches on all pertinent issues pertaining to clients' interests;
- Provision of expertise in the regulatory framework affecting agricultural and environmental issues;
- Advice and consultation to clients regarding the state's and state agencies contracting requirements and regulations.
- Provision of expertise in the budgetary and internal fiscal operations of state government;
- Marketing of client services or products to state and local government and private/public partnerships.

Jim attended Valdosta State College, where he received a Bachelor of Science in Business Administration and Marketing.
TAB 5
(Questionnaire D.1.)

SCOPE OF SERVICES
CAS Governmental Services, LLC (CASGS) Legislative Lobby Team has worked closely with the Village of Indiantown's Legislative Delegation members and staff. There is no learning curve and CASGS can work to ensure that the local projects and concerns are addressed throughout each Legislative Session.

The CASGS Lobby Team understands Florida small, rural local governments better than most lobbying firms because we specialize in small and rural local government and will provide strategic legislative expertise and consulting services in our project approach that can include the following, but may not be limited to:

1. CASGS will contact and communicate with agencies and officers of the State and local government, as directed by the Village Manager.

2. CASGS will establish and maintain liaisons with State and local agencies, officers and elected officials.

3. CASGS will obtain and provide information and data relating to matters concerning interests of the Village.

4. Review of Issues and Policies – CASGS will assist the Village Manager, as directed, in monitoring and reviewing of Legislation, State policies and programs of the State of Florida and Martin County legislation and rule-making processes by the State of Florida agencies (whether pending, introduced or initiated during the term of the contract), which impact the operations, revenues, and/or required expenditures of the Village.

5. CASGS will act as an agent of the Village with members of the State Legislative Delegation, governmental agencies, and persons involved in governmental affairs affecting the Village, when and as designated and authorized by the Village Manager.

6. Coordinate Appointments – CASGS will arrange meetings with Representatives or Senator legislators for the Mayor, Village Council and staff when necessary and be prepared to participate, as required.

7. CASGS will lobby on behalf of Village-sponsored legislation and on specific bills and issues under the general guidance of the Village Manager.

8. Reports – CASGS will submit written monthly reports to the Village Manager, which reflect progress or status of issues of concern to the Village.

9. CASGS will appear before the Village Council and Mayor to report on legislative activity at least once a quarter, during a regularly scheduled meeting or appropriate work session.
10. Provide specific recommendations on legislative and administrative action.

11. **Committee Weeks** -- The CASGS Lobby Team will be present full-time in Tallahassee during Legislative **Committee Weeks** to represent the Village's concerns, issues, monitor appropriation projects, attend Committee Meetings and provide testimony, as appropriate and as directed.

12. **Legislative Sessions** -- The CASGS Lobby Team is present full-time in Tallahassee during **Legislative Session** to represent the Village's concerns, issues, appropriations, to monitor legislation introduced and apprise the Village Manager of policies, legislation and important matters that will affect the Village and its citizens.

13. **Florida League of Cities** - CASGS will work with Florida League of Cities, local and State government officials and agencies throughout the year, as appropriate.

14. **Review Florida League of City Policies** -- CASGS will work, as directed and appropriate, with the Village Manager and staff in analysis of the Florida League of Cities policies and potential submissions of changes to proposed legislation, appropriate agencies and/or organizations to protect the Village of Indiantown.

15. **Legislative Priorities:**
   a. CASGS will meet with the Village Manager or designee, as directed, to determine the Village's Legislative priorities and strategies for the upcoming Legislative Session.
   b. We will assist in the preparation, completion and submission of House and Senate Appropriation Legislative Project Funding Requests Forms, as appropriate and as directed.
   c. Your CASGS Lobby Team will submit the Village's issues and/or requests to your Legislative Delegation, as may be directed.

16. **Lobby Before Committees** -- We will attend, participate, and monitor House and Senate Legislative Committee Hearings throughout Committee Weeks, Legislative Session, and Special Session; and provide testimony, as appropriate and as directed.

17. **Maintain Contact** -- We will keep in contact on important matters with assigned staff and elected officials, as directed by the Village Manager, utilizing cell phones, emails and fax. We pledge to be the most available Legislative Team.
18. Networking of Grants and Appropriations -- CASGS will offer the best possible “Obtain and Maintain” process to non-anticipated sources of revenue. We have “In-House” an outstanding record of networking of grants and appropriations, in order to keep the Village’s matching fund to zero or an absolute minimum. Our success rate over the last 15 years is 80 to 90 percent successful and no one can match CASGS’s ability to utilize one funding source as a match for other funding sources, thus requiring a local government little or no matching funds required. See Tab 7: Grants and Networking for an actual on-going network of grants.
TAB 6
(Questionnaire C. 1. & 2., D. 1.)

SUMMARY OF QUALIFICATIONS
(QUALIFICATIONS AND EXPERIENCE OF PROPOSED TEAM)
FLORIDA SMALL AND RURAL COMMUNITY
EXPERIENCE MATRIX
CAS Governmental Services, LLC (CASGS) has been providing fund acquisition services and representing local legislative issues, which included legislative appropriations under the “Governmental Services” LLC since 2011 and prior to that under the auspices of a division of governmental services in a South Florida engineering firm since 1992. We have been very successful for our client’s projects, especially representing small rural city and county legislative issues and infrastructure projects.

The CASGS success rate, over the last 15 years, is greater than 80 to 90 percent throughout our client base. The amount of funding each year was dependent upon the geographical location of the client versus the make-up of legislative leadership that year in Tallahassee; however, we are proud to say that if projects were funded, we have always done well by our governmental entity clients.

CASGS is prepared to provide the time needed for the Village of Indiantown to accomplish the tasks required in order to see your projects and legislative issues to successful completion. We fully understand that during Legislative Session the issues being driven by the legislature vary greatly on a day-to-day basis. We also are aware that the needs of the Village will vary during legislative session too. We will adapt schedules to assign adequate time, including drawing more staff to your Tallahassee issues on a full-time basis in order to accomplish set goals.

CASGS provides a team approach to legislative appropriations and monitoring of legislation. We believe that a full-service, year-round process is important and must be available, as may be directed, in meeting your goals. James Spratt, Connie Vanassche and Dale Milita work closely with ALL branches of the State budget process.

M. Dale Milita is President of CAS Governmental Services, LLC and he has over 30 years’ experience in representing local issues before the Florida Legislature. Dale has previously served at a City Manager, a County Manager, a Healthcare Taxing District Administrator and he knows and understands the needs of local government from both sides of the podium and for unanticipated revenues through appropriations and grants for small rural local governments. Dale knows how to leverage one funding source against another in order to require as little local matching funds as possible. Dale has worked with the following state agencies in legislative issues, appropriations, grant acquisition and administration: FDEP – Florida Department of Environmental Protection; DEO – Department of Economic Opportunity; FDOT – Florida Department of Transportation; SFWMD – South Florida Water Management District and U. S. Army Corp. of Engineers.
Dale understands fully that "there is no free lunch" but he strongly believes that it is best to seek funding from sources of a much larger tax base (i.e., State of Florida) rather than project funding having to come solely from a smaller, local tax base such as the Village of Indiantown. Dale has been with the CAS/CASGS team for over 25 years.

James R. Spratt, is Vice President and Principle of CASGS. Jim serves as CASGS Director of Legislative Services and a registered lobbyist and works from a Tallahassee office. Jim brings over 16 years' experience to the team working with local, state and Federal governments. He is exceptional in the appropriation process during Committee Weeks and Legislative Session and works well the Legislators and in developing language for legislation and drafting amendments. Jim has a long family history in public service and the political process. His grandfather, J.R. Spratt served in the Florida House of Representatives in the 1960s and his father J.R. Spratt, Jr. served in the Florida House of Representatives (1996-2004). Jim has earned the highest level of respect from Florida's elected officials and colleagues in the lobbying corp. It is because of these relationships and experience Jim brings to the table for every client as they discuss their political goals and issues.

Connie C. Vanassche is a Vice President and Principle of CASGS and has over 18 years in governmental services consulting and is a registered lobbyist. She is not only a valued member of the lobbying team; she oversees the work on-going in Tallahassee but is the point-person in working closely with clients. Connie travels to Tallahassee for Committee Weeks and the Legislative Session. We know that obtaining funding is the first step, but good grant administration and working with the grant agency must occur if our client is to remain eligible for additional funding within the next funding cycle. It is Connie that can provide monitoring of project services, if directed by the Village once projects are funded, in order to maintain the Village's eligibility for future funding cycles.

February 13, 2020
Connie is familiar with FDACS – Florida Department of Agriculture and Consumer Services; FDEP – Florida Department of Environmental Protection; DEO – Department of Economic Opportunity; SFWMD – South Florida Water Management District and FWCC – Florida Fish and Wildlife Conservation Commission.

In addition, we have created a network with other professionals and work together opening doors cumulatively that may have not been as accessible individually. The CASGS Legislative Lobby Team also includes Richard E. Coates, Esq. and Shelley B. Green with Tidewater Consulting, Inc. and James A. Naff of James A. Naff and Associates.
# CAS GOVERNMENTAL SERVICES, LLC.  
## SUMMARY OF QUALIFICATIONS

<table>
<thead>
<tr>
<th>CLIENT:</th>
<th>ISSUES: (dating back no further than 5 years)</th>
<th>KEY PERSONNEL:</th>
</tr>
</thead>
</table>
| **City of Bartow**  
450 North Wilson Avenue  
Bartow, FL 33830  
Contact: George Long, City Manager  
Telephone: 863-534-0100 | Legislative Appropriations  
Wastewater Projects  
Grant Assistance | J. Spratt  
C. Vanassche  
D. Milita |
| **City Belle Glade**  
110 MLK Blvd., W  
Belle Glade, FL 33430  
Contact: Lomax Harrelle, City Manager  
Telephone: 561-992-1623 | Stormwater Projects  
Legislative Appropriations | J. Spratt  
D. Milita  
C. Vanassche |
| **City of Moore Haven**  
P.O. Box 399  
299 Riverside Drive  
Moore Haven, FL 33471  
Contact: David Miller, City Manager  
Telephone: 863-946-0711 | Stormwater Projects  
Hazard Mitigation  
SFWM Defense Appropriations  
Grant Assistance | J. Spratt  
D. Milita  
C. Vanassche |
| **City of Okeechobee**  
55 SE Third Avenue  
Okeechobee, FL 34974-2903  
Contact: Marcos Montes de Oca,  
City Administrator  
Telephone: 863-763-3372 | Stormwater Projects  
Legislative Appropriations  
Commerce Park Project  
State EDCF & Infrastructure Grant  
Grant Assistance | J. Spratt  
D. Milita  
C. Vanassche |
| **City of Wauchula**  
126 South 7th Avenue  
Wauchula, FL 33873  
Contact: Terry Atchley, City Manager  
Telephone: 863-773-3535 | Legislative Appropriations  
Stormwater Projects  
Water Projects | J. Spratt  
C. Vanassche  
D. Milita |
| **Town of Pembroke Park**  
3150 SW 52nd Ave,  
Pembroke Park, FL 33023  
Contact: Todd Larson, Public Works Dir.  
Telephone: 954-966-4600 | Stormwater Projects  
Wastewater Projects  
Legislative Appropriations  
Grant Assistance | J. Spratt  
D. Milita  
C. Vanassche |
**CASC GOVERNMENTAL SERVICES, LLC.**
**SUMMARY OF QUALIFICATIONS**

**Glades County**
Board of County Commissioners  
P.O. Box 1527  
Moore Haven, FL 33471  
Contact: Bob Jones, County Manager  
Telephone: 863-946-6000

- Wastewater Projects  
- Legislative Appropriations  
- Courthouse Improvements  
- Stormwater Projects  
- EOC; Health Dept.  
- Grant Assistance

**Hardee County**
Board of County Commissioners  
412 West Orange Street, Room 103  
Wauchula, FL 33873  
Contact: Commissioner Mike Thompson  
Telephone: 772-773-9430

- Wastewater Projects  
- Legislative Appropriations  
- Courthouse Improvements  
- Legislative Appropriations  
- SB18E Phosphate Mining Appropriations  
- Bill providing additional funding for the local government  
- EOC

**Okeechobee County**
304 NW 2nd St.  
Okeechobee, FL 34927  
Contact: Robbie Chartier, County Administrator  
Telephone: 863-763-6441

- Courthouse Improvements  
- Stormwater  
- Legislative Appropriations  
- Fire Station  
- Grant Assistance

**Okeechobee Utility Authority**
100 SW 5th Avenue  
Okeechobee, FL 34973  
Contact: John Hayford, P.E., Executive Director  
Telephone: 863-763-9460

- Wastewater Projects  
- Legislative Appropriations  
- Grant Assistance  
- Special Legislation

*Other team members working in association with CASGS are assigned to our clients throughout Committee Weeks and Legislative Session.*

**Small Rural Coordination to FLOC —**

Your CAS Team – works closely with the League of Cities to support and augment issues to provide benefits to the Village of Indiantown. However, we do not blindly follow the cookie-cutter approach, we monitor and will oppose issues that you do not feel are beneficial to your citizenry.
<table>
<thead>
<tr>
<th></th>
<th>Hardee County</th>
<th>Town of Pembroke Park</th>
<th>City of Moore Haven</th>
<th>Glades County</th>
<th>Moore Haven/Glades PWA</th>
<th>Okeechobee County</th>
<th>City of Okeechobee</th>
<th>Okeechobee Utility Authority</th>
<th>City of Belle Glade</th>
<th>City of Wauchula</th>
</tr>
</thead>
</table>
TAB 7
(Questionnaire D.2.)

GRANTS & NETWORKING
NETWORKING OF GRANTS
AND OTHER FUNDING
NETWORKING 101
GRANTS/THIRD PARTY FUNDING
FLORIDA STATUTE CHAPTER 92-132
CAS Governmental Services, LLC (CASGS) will meet your expectations and exceed in overall knowledge of the process of networking grants, state and federal appropriations allowing you for the least possible funding match with Village of Indiantown revenues.

Your CASGS Team has experience in seeking funding and the entire process of local government grants and appropriations. We have successfully sought State Economic Development Transportation Fund Grants (EDTF) for roadway projects associated with Industrial Parks and Parks of Commerce. We have successfully acquired grant funding from the Federal Department of Commerce, Economic Development Administration (EDA) for city and county wastewater projects and for industrial parks associated projects. We previously have participated in the CDBG Grant Program with the CDBG-ED and the CDBG-NR Grants. CASGS has written FRDAP Grants for municipal parks, expansion of picnic parks, and playgrounds. Another area of our expertise has been to support at the State level during the Legislative Sessions the increases in the FDEP-FRDAP portions of the State Budget in order to assist additional FRDAP Projects funding.

CASGS participated in the first ever city grant program becoming available for local municipal roads and streets.

CASGS has participated in the FEMA Hazard Mitigation Grant Program (HMGP). We have assisted local governments in order that they have become eligible for stormwater funding for city and county projects. We know the HMGP process well enough that some clients have received tier two and three funding levels. One local government, the City of Moore Haven, received a total grant, Phase I and Phase II of $2,275,000 for a local stormwater project. In addition to the HMGP, this small City, through our efforts, has also received other matching fund grants and appropriations of $1,258,000. Requiring no local funding from the City Revenues.

Because of the need to diversify our fund acquisition efforts, we have traveled to Washington, D.C. on behalf of clients. We wrote federal appropriation requests in the amounts of $3,200,000 and $4,600,000. CASGS can assist the Village of Indiantown in a limited forum at the Federal-Congressional level and we have, if needed, affiliations with Washington, D.C. level lobbying firms when a more full-time Washington lobbying effort is needed.
CAS GOVERNMENTAL SERVICES, LLC
NETWORKING OF GRANTS AND OTHER FUNDING

NETWORKING

**CAS** Governmental Services, LLC (CASGS) was the first firm to custom design a program that would successfully bring together funding from multiple sources in a manner that could allow a local government to utilize one funding source as a match for another in order to provide relief from required local government funding matches.

We refer to this as “Networking 101”. The reason we call it “Networking 101” is that many folks are still trying to learn its intricacies and technique, but to date, we believe that we are the ones that developed this process successfully and others are still in the learning curve phase.

**CASGS** has not just been involved in locating and obtaining funding sources for local governments, we have also been on the cutting edge in making the State Government, both the Executive and Legislative branches aware of the need for the smaller rural local governments to find exemptions to matching funds. Because of our hands-on experience, we know first-hand that many times being successful in obtaining a grant or appropriation is not useful if there is a matching fund requirement and you don’t have the funds.

As early as 1992, we were directly responsible for the “first ever” Florida Statute Amendment that began the process of providing the areas financially injured due to State of Florida Environmental Clean-up Initiatives *(see Chapter 92-132)*. We also can assist in drafting language for amendments and bills.

Another giant step toward bringing the “Networking 101” process in for a successful landing was a City-County Public Works Authority Wastewater project that began in 1993. We were asked, as were two other firms, to make a presentation as to our overall services but the main emphasis was to determine estimates of how much funding could be brought to the table by each firm.

The other firms quoted the typical 50-60% loan – 40-50% grants combinations. It was apparent that these were the usual USDA Farmer Home loan grants that were readily available at that time. The **CASGS** Team stepped up to the table and made our estimate of 85-90%, which was unheard of in governmental circles of that time.
Upon being selected, we found that our estimate was not exactly correct. The project we were selected for is still on-going and to date this community has been able to develop a modern wastewater utility with **ABSOLUTELY NO REQUIRED LOCAL FUNDS and NO DEBT SERVICE.** We are extremely proud of our track record on this project.

The attachment labeled “Networking 101” will show this wastewater project with year-to-year funding detail and you will see first-hand where several funding sources were brought to the table at once to utilize federal, regional, state and local funding sources into play matching one another.

While this “Networking 101” is not exactly rocket science, it does take people trained in fund acquisition AND grant administration that are willing to take the time necessary and care enough about small rural local government to make the process work. On the CASGS Team, our firm president, Dale Milita having served as a City Manager, a County Manager and Special Hospital Administrator knows and understands the process well.
**CAS GOVERNMENTAL SERVICES, LLC**

**NETWORKING 101**

**NETWORKING OF GRANTS AND OTHER FUNDING**

*This is an actual, on-going project and references are available upon request.*

<table>
<thead>
<tr>
<th>Year</th>
<th>Fund Acquisition For This Project:</th>
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<tbody>
<tr>
<td><strong>1994:</strong></td>
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<tr>
<td><em>Infrastructure Grant</em></td>
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<td><em>Regional Funding Source for Feasibility Study</em></td>
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<td><em>Private Corporate Grant</em></td>
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<td><em>Local Government (In-Kind) Land</em></td>
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<td><strong>Total 1994 Fund Acquisition For This Project:</strong></td>
<td><strong>$715,000.00</strong></td>
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<td><strong>1995:</strong></td>
<td></td>
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<tr>
<td><em>Federal Grant Source</em></td>
<td>$975,000</td>
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<td><em>Regional Funding Source</em></td>
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<tr>
<td><strong>Total 1995 Fund Acquisition For This Project:</strong></td>
<td><strong>$1,275,000.00</strong></td>
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<tr>
<td><strong>1996:</strong></td>
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<tr>
<td><em>State Legislative Appropriation</em></td>
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<td><em>Regional Funding Source</em></td>
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<td><strong>Total 1996 Fund Acquisition For This Project:</strong></td>
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<td><strong>1997:</strong></td>
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<td><em>State Legislative Appropriation</em></td>
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<td><strong>1998:</strong></td>
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<td><em>State Legislative Appropriation</em></td>
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<td><strong>1999:</strong></td>
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<td><em>Regional Agency Funding</em></td>
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<td><em>Regional Funding</em></td>
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<td><em>State Legislative Appropriation</em></td>
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<td><em>State Special Legislative Appropriation</em></td>
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<td><em>State Appropriation</em></td>
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<td><em>State Legislative Appropriation</em></td>
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<td><strong>2003:</strong></td>
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<tr>
<td><em>State Legislative Appropriation</em></td>
<td>$750,000.00</td>
</tr>
<tr>
<td>Year</td>
<td>Funding Source</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td>2004</td>
<td>State Legislative Appropriation</td>
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<tr>
<td></td>
<td>Regional Funding</td>
</tr>
<tr>
<td></td>
<td><strong>Total 2004 Fund Acquisition For This Project:</strong></td>
</tr>
<tr>
<td>2005</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2006</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2007</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2009</td>
<td>*Regional Agency Funding</td>
</tr>
<tr>
<td>2010</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2013</td>
<td>State Legislative Appropriation</td>
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<tr>
<td>2015</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2018</td>
<td>State Legislative Appropriation</td>
</tr>
<tr>
<td>2019</td>
<td>State Legislative Water Quality Grant</td>
</tr>
<tr>
<td></td>
<td><strong>TOTAL FUNDING TO DATE:</strong></td>
</tr>
</tbody>
</table>

This local government wastewater project began with just a small grant, written and administered by us, in the amount of $575,000 and grew to its present-day amount and was done with no local funding required. We can change the way local project’s grant funding is done by Networking year-to-year funds.
The Team Members of CAS Governmental Services LLC (CASGS) have extensive experience in preparing projects that are funded through third party transactions such as State of Florida Legislative Appropriations and Grants. We also can provide information as may be appropriate for Federal Grants and other third party funded projects. Because CASGS works primarily with local governments our team of professionals is second to none in our ability to successfully utilize special “outside” funding sources to bring your project in on a timely basis, we also know and understand the need to phase projects and complete the appropriate phase in a manner which will keep matching funds to an absolute minimum and the Village of Indiantown eligible for funding during the next funding cycle.

CASGS has completed and teamed up with many projects funded through the State of Florida, former Department of Community Affairs CDBG Program (CDBG-ED) (CDBG-NR) (CDBG-H), USDA-RUS, the United States Department of Commerce Economic Development Administration (EDA), State of Florida Economic Development Transportation Fund (EDTF), Department of Environmental Protection (FDEP) and Legislative Appropriations. We have funding specialists “in-house”, we not only will be your registered lobbyists, but we have been told many times that our team is “grant-trained”. We know and understand the need to come in within budget. Most of our clients require that the project is completed within the Grant Amount or the result is there no project at all. We are also able to offer other assistance in completion of grant related documents, if needed and directed by the Village. Our funding specialists are able, as may be directed, to expedite the disbursements from the funding agency in a manner that usually does not require reimbursement where the Village of Indiantown would be required to use local city dollars while awaiting long reimbursement times. If directed, we can prepare and submit documents for you.

Most lobbying firms can go out, seek and team up with a funding specialist for projects like yours, however, at CASGS, we don’t have to do that because our funding specialists are all “in-house”. CASGS no longer performs CDBG in-house. Your project data is therefore closely monitored and you are kept well informed all along the way.
(4) An application for an NPDES permit and other approvals from the state relating to the permitted activity shall be granted or denied by the department within the time allowed for permit review under 40 C.F.R. part 123, subpart C. Other than for stormwater discharge permitting, the decision on issuance or denial of such permit may not be delegated to another agency or governmental authority. The department is specifically exempted from the time limitations provided in ss 120.60 and 403.0876. However, if the department fails to render a permitting decision within the time allowed by 40 C.F.R. part 123, subpart C, or a Memorandum of Agreement executed by the department and the U.S. Environmental Protection Agency, whichever is shorter, the applicant may apply for an order from the circuit court requiring the department to render a decision within a specified time.

(5) The department shall respond, in writing, to any written comments on a pending application for a state NPDES permit which the department receives from the Executive Director, or his designee, of the Game and Fresh Water Fish Commission or the Department of Natural Resources, on matters within the commenting agency's jurisdiction. The department's response shall not constitute agency action for purposes of s. 120.57 or other provisions of Chapter 120.

Section 17. The sum of $250,000 is appropriated for fiscal year 1992-1993 from the Operating Permit Fee Trust Fund, and four positions are authorized, for the Department of Environmental Regulation to develop an application for receipt of delegation of the National Pollution Discharge Elimination Program from the Environmental Protection Agency and to develop the necessary procedural and data management changes needed to implement the program in this state. The department shall issue a report and recommendations by December 1, 1992, for further legislative changes needed to implement the program by January 1, 1994.

Section 18. (1) It is the intent of the Legislature to vigorously protect and restore the environment of this state. However, the Legislature recognizes that in some instances such protection and restoration efforts may adversely affect the local economy in certain areas and the present and future revenue sources of the local government in such areas. Further, it is the intent of the Legislature to minimize such adverse economic impacts.

(2) To the greatest extent practicable, and where, consistent with criteria otherwise set forth by law, a state agency which awards or recommends any grant, loan, or other financial aid to municipalities or counties is encouraged to give preferential consideration to municipalities or counties which have been adversely affected by an environmental cleanup initiative conducted by a state or regional agency.

Section 19. Paragraph (a) of subsection (1) of section 403.914, Florida Statutes, is amended to read:

403.914 Jurisdictional declaratory statements -

(1) Before applying for a permit to dredge or fill, a property owner, an entity which has the power of eminent domain, or another person with a legal or equitable interest in property may petition the department for a declaratory statement of the dredge and fill jurisdiction of the department. The department shall, by rule, specify information which must be provided and may require authorization to enter upon the property. The department may require a fee of at least $250 and not more than $10,000 to cover the direct costs of acting upon the petition. The fee
TAB 8

E. FEE SCHEDULE
CAS Governmental Services, LLC (CASGS) offers two opportunities for the Village of Indiantown to consider for professional lobby representation services. We propose lump sum or a cost-plus option.

Lump Sum Fee – $34,000.00 to be invoiced $2,833.33 monthly. Our fee will include expenses, hourly charges and travel during regular duties. Housing, meals, and lobby registration fees, cost normally associated with duties of the scope of services. Special duties and/or trips assigned by the Village would require prior authorization.

Cost Plus Fee - $20,000.00 retainer fee plus expenses. Cost plus expenses are calculated depending upon the expenses, housing, meals, travel, man-hours etc. and CASGS will provide you with a travel expense estimation form prior to expenditures utilizing the Cost-Plus Plan.

CASGS provides Grant Administration Services. We administer grants in an accurate and timely manner that meets or exceeds requirements for the Village of Indiantown to remain eligible for the following funding cycles.

Should the Village desire to utilize our grant administration services, which provides, from project concept meetings, to preparing and submitting all reports throughout the term of the grant, to a successful close-out. We will be glad to provide information, in greater detail, in a separate document if selected.

CASGS is willing to negotiate any mutually acceptable method of payment.
TAB 9
(Questionnaire B.2.)

F. REFERENCES
REPUTATION & CLIENT REFERENCES
The CASGS Lobby Team's Reputation is easily demonstrated by the years of continuous service:

<table>
<thead>
<tr>
<th>Town of Pembroke Park</th>
<th>City of Bartow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(23 years continuous service)</strong></td>
<td><strong>(9 years of continuous service)</strong></td>
</tr>
<tr>
<td>3150 SW 52nd Avenue, Pembroke Park, Florida 33023</td>
<td>450 N. Wilson Avenue, Bartow, Florida 33831</td>
</tr>
<tr>
<td>Telephone: 954-966-4600</td>
<td>Contact: George Long, City Manager</td>
</tr>
<tr>
<td>Email: <a href="mailto:Tlarson@townofpembrokepark.com">Tlarson@townofpembrokepark.com</a></td>
<td>Telephone: 863-534-0100</td>
</tr>
<tr>
<td>Contact: Todd Larson, Public Works Director</td>
<td>Email: <a href="mailto:glong@cityofbartow.net">glong@cityofbartow.net</a></td>
</tr>
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<table>
<thead>
<tr>
<th>City of Okeechobee</th>
<th>City of Moore Haven</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(18 years continuous service)</strong></td>
<td><strong>(18 years continuous service)</strong></td>
</tr>
<tr>
<td>55 SE Third Avenue, Okeechobee, FL 34974-2903</td>
<td>P.O. Box 399, Moore Haven, FL 33471</td>
</tr>
<tr>
<td>Contact: Marcos Montes De Oca, City Administrator</td>
<td>Contact: David Miller, City Manager</td>
</tr>
<tr>
<td>Telephone: 863-763-3372</td>
<td>Telephone: 863-946-0711</td>
</tr>
<tr>
<td>Email: <a href="mailto:mmontesdeoca@cityofokeechobee.com">mmontesdeoca@cityofokeechobee.com</a></td>
<td>Email: <a href="mailto:davidmiller@moorehaven.org">davidmiller@moorehaven.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City of Wauchula</th>
<th>City-County Public Works Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(5 years continuous service)</strong></td>
<td><strong>(23 years continuous service)</strong></td>
</tr>
<tr>
<td>126 South 7th Avenue, Wauchula, Florida 33873</td>
<td>P.O. Box 1221, Moore Haven, FL 33471</td>
</tr>
<tr>
<td>Contact: Terry Atchley, City Manager</td>
<td>Contact: Maxine Brantley, CCPWA Clerk</td>
</tr>
<tr>
<td>Email: <a href="mailto:tatchley@cityofwauchula.com">tatchley@cityofwauchula.com</a></td>
<td>Email: <a href="mailto:Maxinebrantley@moorehaven.org">Maxinebrantley@moorehaven.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City of Belle Glade</th>
<th>Okeechobee Utility Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(5 years continuous service)</strong></td>
<td><strong>(21 years continuous service)</strong></td>
</tr>
<tr>
<td>2016 City of Belle Glade, 110 Dr. Martin Luther King Jr. Blvd West, Belle Glade, Florida 33430</td>
<td>100 SW 5th Avenue, Okeechobee, FL 33474</td>
</tr>
<tr>
<td>Contact: Lomax Harrelle, City Manager</td>
<td>Contact: John Hayford, P.E., Executive Director</td>
</tr>
<tr>
<td>Telephone: 561-996-0100</td>
<td>Telephone: 863-763-9460</td>
</tr>
<tr>
<td>Email: <a href="mailto:lharrelle@belleglade-fl.com">lharrelle@belleglade-fl.com</a></td>
<td>Email: <a href="mailto:jhayford@ouafl.com">jhayford@ouafl.com</a></td>
</tr>
</tbody>
</table>

CAS Governmental Services, LLC has for many years worked closely with legislative delegations that represent small rural communities. We have worked directly with the legislators and their staff that will provide support for the Village of Indiantown as well as other small, rural cities and counties.
TAB 10

G. IMPLEMENTATION SCHEDULE

PROJECT APPROACH
CAS GOVERNMENTAL SERVICES, LLC
PROJECT APPROACH

**CAS Governmental Services, LLC Legislative** Team understands Florida small cities and our project approach can include the following, but may not be limited to

**March 1, 2020:**
- To represent the Village in the final 13 days of the 2020-2021 Legislative Session. Immediate Lobby registration with the Florida Legislature will be completed.
- Registration and lobby disclosure requirements must be completed with the Florida House of Representatives.
- Provide the Florida House of Representatives with a copy of the fully executed contract between the Village and CASGS, per House Rules.
- Disclose the Village of Indiantown’s issues (i.e., HB#2639) with the Florida House of Representatives.
- The budget process for the 2020-2021 Legislative Session will be in full swing with the Conferencing process underway.
- The Lobby Team will be fully engaged in Tallahassee until the 2020-2021 Legislative Session ends on March 13, 2020.
- CASGS will work with Senator Harrelle and Representative Magar and their staff to assist with the Village’s Legislative Appropriations Funding request HB#2639 Road/Stormwater Drainage Reconstruction project, which was presented and passed favorably out of the House Transportation and Tourism Appropriations Subcommittee on December 10, 2019, thus putting the Village’s project in posture to be eligible for funding.
- We will work with Leadership in the House and Senate for the Village’s Road/Stormwater Drainage Reconstruction project during the Conferencing process.
- Review and report of the budget and legislation/bills passed during the 2020-2021 Legislative Session.

**April – July, 2020:**
- Meet with the Village Manager, Mayor or designee, as directed, to determine the Village’s Legislative priorities for the 2021-2022 Legislative Session.
- Address the Council as requested/desired.
- Review and monitor the Governor’s actions for signing/vetoing of bills, legislation and budget items that were passed during the 2020-2021 Legislative Session.
- Meet with the Village’s Legislator’s, as appropriate and/or as directed by the Village Manager.
- Provide verbal or written updates of issues, as desired.

**August – December, 2020:**
- Meet with the Village Manager, Mayor or designee, as directed.
- Complete the Village’s Legislative priorities for the 2021-2022 Legislative Session.
- Address the Council as requested/desired.
• Begin preparations for the 2021-2022 Legislative Session, which will begin the first Tuesday after the first Monday in March of 2021.
• Assist the Village, as directed, with the preparation of the Legislative Delegation documentation.
• Submit issues and/or requests to the Village’s Legislative Delegation, as may be directed by the Village Manager.
• Attend the Martin County Legislative Delegation Hearing when scheduled, as appropriate.
• Prepare for Committee Weeks for the 2021-2022 Legislative Session, which are held within the previous four-months prior to the start of the Florida Legislative Session.
• Assist in completion of Legislative Appropriation Project Requests, as appropriate and as directed.
• Keep in contact with assigned staff and elected officials utilizing cell phones, emails, fax equipment. We pledge to be the most available Legislative Team.
• Schedule appointments with representatives/senators, as requested/desired.

November 2020 - February 2021:
• Attend Committee Weeks for the 2021-2022 Legislative Session.
• Attend House and Senate Committee meetings as scheduled and provide testimony, as appropriate.
• Monitor and meet the House and Senate appropriation submittal deadlines.
• Meet with the Village’s Legislators in Tallahassee throughout Committee Weeks.
• Provide talking points and background information to Legislators for presentation of the Village’s appropriation projects.
• Track legislation being filed and presented during Committee Weeks to protect the interests of the Village of Indiantown.
• Address the Council as requested/desired.
• Provide verbal or written updates of issues, as desired.
• Work with State government officials as necessary throughout the year, as appropriate.
• Schedule appointments with representatives/senators, as requested/desired.

March 2021 – The 2021-2022 Legislative 60-day Sessions begins.
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<td>D. QUESTIONNAIRE</td>
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<tr>
<td>Christopher L. Carmody, Jr.</td>
<td>26</td>
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<td>Joseph R. Salzverg</td>
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<tr>
<td>Dean Cannon</td>
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<tr>
<td>Katherin Flury*</td>
<td>34</td>
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<tr>
<td>Kim McDougal*</td>
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<tr>
<td>Kirk Pepper*</td>
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<tr>
<td>Robert F. Stuart Jr.*</td>
<td>38</td>
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<tr>
<td>Jason L. Unger</td>
<td>41</td>
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<tr>
<td>E. ATTACHMENTS</td>
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</table>

*Denotes non-attorney professional*
C. EXECUTIVE SUMMARY

Provide a brief summary describing the proposer's ability to perform the work requested, a history of the proposer's background and experience providing services, the qualifications of the proposer's personnel to be assigned to this project, any subcontractor, sub consultants, and/or suppliers and a brief history of their background and experience, and any other information called for by this request for proposal which the proposer deems relevant, including restating any exceptions to this request for proposal. This summary should be brief and concise to apprise the reader of the basic services offered, experience and qualifications of the proposer, staff, subcontractors, and/or suppliers

GrayRobinson is a full-service law and lobbying firm with more than 250 government relations professionals and attorneys in 15 offices across the State of Florida and in Washington, DC. We offer not only an extensive range of services, but depth and proficiency in each one.

GrayRobinson and the proposed personnel (the “Firm” or the “Team”) have a strong and widely respected foundation in Legislative and Executive branch government relations services, and decades of experience in lobbying the Florida Legislature, both offensively and defensively, on behalf of hundreds of public entity clients. Many of our consultants and attorneys began their careers, or have invested portions of them, as staff to the Florida Legislature, the Governor’s Office, state agencies, and working in local government service. In addition to veteran lobbyists, the GrayRobinson Team includes two former Speakers of the Florida House, a former State Senator, the former House and Senate General Counsel, the immediate past Chief of Staff and the immediate past General Counsel to Governor Scott, a former counsel to the Speaker of the Florida House of Representatives, multiple local government finance and policy experts, and former political consultants. This experience enables GrayRobinson to provide its clients with unique perspective on the most efficient means of meeting their legislative goals.

As well, our Team members have decades of experience successfully representing clients before Florida’s regulatory agencies, including but not limited to: the Department of Business and Professional Regulation, Division of Emergency Management, Department of Transportation, Department of Economic Opportunity, Department of Education, Department of Financial Services, Office of Insurance Regulation, the Attorney General, Department of Environmental Protection, Department of Agriculture and Consumer Services, and Agency for Health Care Administration. We have especially strong relationships with the Florida Department of Transportation, Florida Department of Environmental Protection, the Division of Emergency Management, and Visit Florida, which we know are important to achieving the strategic goals of The Village of Indiantown (the “Village”) for boosting economic development and securing infrastructure improvements.

The Village will have many complex and layered challenges as well as groundbreaking opportunities ahead as a newly incorporated Village in the State of Florida. GrayRobinson is unique among its competitors because we have been right where you are now, on behalf of the Village of Estero. GrayRobinson pushed to secure legislative approval for the establishment of the Village of Estero, and we have remained engaged in Estero’s continued growth. We are intimately familiar with the multiple high-priority needs that face the Village as a [relatively] newly incorporated community in the State of Florida, and we look forward to putting our in-depth knowledge and experience to work for the Village of Indiantown.

The Firm is a founding member of Floridians for Better Transportation, and has long held a gubernatorial-appointed seat on the board of Enterprise Florida, Inc. [the state’s public-private-partnership economic development arm], serving regularly as...
chair of its Legislative Affairs Committee. GrayRobinson lobbyists are known for their experience and leadership protecting the sovereignty of Home Rule, and our Firm has been at the forefront of defending its principles on behalf of our public sector clients for five decades. Our Team also has successfully defeated dozens of proposed state and federal mandates for our public sector and private industry clients, and its most recent successes securing appropriations for our public sector clients alone total in the hundreds of millions of dollars. The entire GrayRobinson team is active in key organizations including Chambers of Commerce, and travel, tourism and economic development boards. The Team is especially active in the political process, maintaining close and meaningful relationships with legislators, and key statewide and local political leaders. The combined experience of these Team members affirms the Team’s strong working knowledge of legislative, administrative, and regulatory processes at the state and local levels.

Our experience in advocating for and against substantive legislation, pursuing worthy regulatory reforms, advocating within and successfully effecting the appropriations and amendatory processes, our unmatched understanding of and proficiency in legislative and executive lobbying, and our unequalled experience working for local communities, makes GrayRobinson ideally suited to serve the Village in the capacity of Lobbyist Services. The proposed Team [whom you will meet in depth on pages 26-43] has been strategically chosen to represent the requisite policy, budgetary, and political backgrounds, experience, and skillsets to perform the work requested and accomplish the Village’s strategic objectives. As well, each member of the GrayRobinson Team can swiftly respond to changing situations and advise the Village when emerging circumstances offer significant opportunities. Individually and as a Team, there is no one better suited to this representation.
GrayRobinson, P.A., has 15 offices across the State of Florida and in Washington, DC. Addresses for each office are listed below.

Boca Raton
Mizner Park Office Tower
225 N.E. Mizner Blvd.
Suite 500
Boca Raton, FL 33432
Phone: 561-368-3808

Fort Lauderdale
401 E. Las Olas Blvd.
Suite 1000
Fort Lauderdale, FL 33301
Phone: 954-761-8111

Fort Myers
1404 Dean St.
Suite 300
Fort Myers, FL 33901
Phone: 239-340-7979

Gainesville
720 SW 2nd Ave.
Suite 106
Gainesville, FL 32601
Phone: 352-376-6400

Jacksonville
50 N. Laura St.
Suite 1100
Jacksonville, FL 32202
Phone: 904-598-9929

Key West
221 Simonton St.
Key West, FL 33040
Phone: 305-294-0252

Lakeland
One Lake Morton Drive
Lakeland, FL 33801
Phone: 863-284-2200

Melbourne
1795 W. NASA Blvd.
Melbourne, FL 32901
Phone: 321-727-8100

Miami
333 S.E. 2nd Ave.
Suite 3200
Miami, FL 33131
Phone: 305-416-6880

Naples
3030 Tamiami Trail N.
Suite 410
Naples, FL 34103
Phone: 239-598-5601

Orlando
301 E. Pine St.
Suite 1400
Orlando, FL 32801
Phone: 407-843-8880

Tallahassee
305 South Bronough St.
Suite 600
Tallahassee, FL 32301
Phone: 850-577-9090

Tampa
401 E. Jackson St.
Suite 2700
Tampa, FL 33602
Phone: 813-273-5000

Washington, DC
439 New Jersey Ave. SE
Washington, DC 20003
Phone: 202-546-1761

West Palm Beach
515 N. Flagler Dr.
Suite 1425
West Palm Beach, FL 33401
Phone: 561-268-5727
2. Letter of transmittal signed by an individual authorized to bind the respondent, stating that the respondent has read and will comply with all terms and conditions of the RFP.

Susan A. Owens, MPA, MMC
Village Clerk
Village of Indiantown
16550 SW Warfield Boulevard
Indiantown, FL 34956
Dear Ms. Owens:

On behalf of GrayRobinson, P.A., we are pleased to offer this proposal to the Village of Indiantown to provide Lobbyist Services to encourage responsive and responsible decision making with emphasis at the Martin County and State levels, and to serve as an information provider and consultant to the Village Mayor, Village Council, and Village Manager regarding legislative and related administrative process issues. GrayRobinson is prepared to serve in a consulting and advisory capacity to the Village for relevant issues proposed or pending before the Florida Senate, Florida House of Representatives, Florida administrative agencies, Martin County Board of County Commissioners, Legislative Delegations, and County governmental agencies. This will include, but is not limited to, issues in regular legislative sessions, special sessions, subcommittees and committees, and other public meetings as appropriate. We present herein our qualifications, and detail the Firm’s professional experience and accomplishments that demonstrate why we are exceptionally and uniquely qualified to provide Lobbyist Services to the Village. We have read and will comply with all terms and conditions of the RFP.

Throughout the last five decades, GrayRobinson has served as counsel to the State of Florida, the House of Representatives, governors, legislators, and numerous cities and counties. Due to our outstanding relationships with elected and appointed officials at the local and state levels, we have successfully represented public sector clients before Florida governmental entities on everything from legislative appropriations, grant applications, procurement, and land use matters. Our Firm has the notable and unique distinction of having been behind the legislative effort to approve the incorporation of the Village of Estero, and we have remained engaged in Estero’s continued growth. This gives us immediate understanding of many of the Village’s needs and priorities. In short, GrayRobinson is deeply involved in Florida’s government and political processes, and the Team presented in this proposal, along with the Firm at large, understands how state and local government works, what local communities value and need, and that’s what we deliver.

The Team’s approach to representing the Village is outlined in the following pages. We trust the professional accomplishments of individual Team members, and the resources and experience of GrayRobinson and the Team as a whole, sufficiently speak to our ability to work with you to successfully accomplish your strategic goals. The GrayRobinson Team stands ready to ensure the overall success of the Village’s legislative priorities and confirms we can assist you in all areas listed in the Scope of Services. It is our hope you will recognize the exclusive assets of the Firm’s professionals and favorably consider this proposal. We look forward to hearing from you.

Sincerely,

Christopher L. Carmody, Jr.
Shareholder

Joseph R. Salzberg
Attorney at Law/Government Consultant

February 13, 2020
3. General information about the primary contact who would be able to answer questions about the proposal. Include name, title, telephone number and email address of the individual.

Based on the stated scope of work for state lobbyist services in Tallahassee, as well as the provision of counsel and consultation with the Village leadership during work sessions and regularly scheduled meetings in Indiantown, GrayRobinson is proposing two experienced professionals to lead its Team and be available at all times to support the Village. Christopher Carmody and Joseph Salzverg will serve as co-leaders for this response and are the primary contacts available to answer questions about the proposal. Further details are included below.

CHRISTOPHER L. CARMODY, JR., SHAREHOLDER
Direct: 352-514-2196 Email: chris.carmody@gray-robinson.com
When he’s not lobbying on behalf of clients in Tallahassee, Chris is based in the Firm’s Orlando office. He earned his certification as a Designated Professional Lobbyist from the Florida Association of Professional Lobbyists and is an attorney admitted to practice in all Florida state courts. He has substantial experience handling government relations matters, including representation before the Florida Legislative and Executive branches, managing purchasing and procurement appeals, and professional licensing. Chris’s clients range from small cities to Fortune 500 companies, and his legislative experience covers the passing of landmark legislation to defeating attempts to erode the sovereignty of home rule to engaging his proficiency with the appropriations process. Chris also practices in litigation, land use, construction, and sports law. His practice includes obtaining state and local government regulatory approvals as well as matters related to the acquisition, development and utilization of real property.

JOSEPH R. SALZVERG, ATTORNEY AT LAW/GOVERNMENT CONSULTANT
Direct: 305-416-4403 Email: joseph.salzverg@gray-robinson.com
Joseph is a Miami native based in the Firm’s Miami office who regularly advocates for his clients on issues related to home rule, affordable housing, transit, professional licensure, vessels and waterways, and emergency operations. He has extensive experience working with the Florida Department of Transportation, Department of Business and Professional Regulation, Division of Emergency Management, Department of Economic Opportunity, and the Department of Environmental Protection. He is intimately familiar with South Florida’s political and public policy processes and procedures, and the complex issues faced by local governments and businesses. He recognizes the full scope of these issues and the vast number of organizations tasked with coordinating the planning and execution of initiatives to tackle the major challenges facing municipalities today. He applies that experience and knowledge when he is in Tallahassee lobbying Florida’s Legislative and Executive branches of government in areas including: appropriations, growth management, local government, healthcare, insurance, regulated industries, transit, and utilities.

B. Qualifications and Experience of the Firm

1. Describe your firm’s history and organizational structure. Include the size of the firm, location of offices, years in business, organizational chart, name(s) of owner(s) and principal parties, and number and position titles of staff.

GrayRobinson is a full-service lobbying and law firm with more than 250 government relations professionals and attorneys in 14 offices across the state of Florida in Miami, West Palm Beach, Key West, Boca Raton, Fort Lauderdale, Melbourne, Tallahassee, Orlando, Gainesville, Jacksonville, Naples, Fort Myers, Lakeland, and Tampa, and a federal government lobbying office in Washington, DC. GrayRobinson is a corporation founded in Orlando in 1970 as Gray, Harris, Adams &
2. What is the primary business of the parent company and/or affiliates?

GrayRobinson is a full service law and lobbying firm.

3. Which office(s) of your organization will have primary responsibility for managing this account? List the members of your team who will be responsible for providing the services and for ongoing support. Describe the duties of these team members.

The RFP scope of work for the Village’s requested lobbyist services covers multiple geographies: lobbyist services and potential meetings for Village leadership with elected officials which will be based primarily in Tallahassee, as well as presentations and meetings between GrayRobinson, the Village Council and Mayor which will be held primarily in Indiantown. For reasons of efficiency, proximity and practicality, GrayRobinson proposes staffing this account with a Team based out of Miami, Orlando, and during Legislative Sessions and Committee Weeks, as and needed, in Tallahassee.
GrayRobinson will utilize a team approach designed to maximize communication and responsiveness to the Village’s needs. As mentioned previously, the primary Lobbying Leads at GrayRobinson for all work done on behalf of the Village will be Chris Carmody and Joseph Salzverg. Chris and Joseph will direct the efforts of the Firm and be accountable for all work executed. In addition to Chris and Joseph, former Speaker of the Florida House of Representatives and GrayRobinson President Dean Cannon, Katie Flury, Kim McDougal, Kirk Pepper, Robert Stuart, and Jason Unger will also serve as the primary Team for the Village’s representation.

TEAM LEADER CHRISTOPHER L. CARMODY, JR.
SHAREHOLDER

Chris will serve as Co-Team Leader for all government services and lobbying work done by Team members on behalf of the Village. He will be one of two designated key contacts for the Village, make and monitor assignments for the Team, and set performance measurements based on the Village’s specific needs and requirements. Chris has substantial experience handling government relations matters, including representation before the Florida Legislative and Executive branches, purchasing and procurement appeals, and professional licensing. He will bring his experience lobbying members of the Florida Legislature for appropriations to bear on behalf of the Village as he works representing the Village’s legislative interests before elected officials, other key governmental leaders and agency officials when supporting legislation. His relationships with the Department of Economic Opportunity and Enterprise Florida allow him to provide strong support to Village grants, as well as working to build productive relationships and organize meetings and briefings between Village representatives and key contacts in Tallahassee, and wherever appropriate.

TEAM LEADER JOSEPH R. SALZVERG
ATTORNEY AT LAW/GOVERNMENT CONSULTANT

Joseph will serve as Co-Team Leader for all government services and lobbying work done by Team members on behalf of the Village. He will be a designated point of contact for the Village, will make and monitor assignments for the Team based on the Village’s specific needs and requirements. Joseph has multiple years of experience in Florida’s political and public policy arenas, in both the public and private sectors. Joseph previously worked as a political consultant for several members of the current Legislature, running political campaigns in mostly Spanish-speaking districts in Miami-Dade County. He maintains close and productive working relationships with many members of the Hispanic Caucus currently serving in the State legislature. Joseph also worked as a Legislative Analyst on the Regulatory Affairs Committee in the Florida House of Representatives, and has successfully represented public entities and transportation interests as an attorney and lobbyist. Joseph will bring his personal relationships with members of the Florida Legislature to bear on behalf of the Village as he works representing the Village’s legislative interests before elected officials, other key governmental leaders and when lobbying for appropriations and developing other opportunities.

TEAM MEMBER DEAN CANNON
GRAYROBINSON PRESIDENT AND CEO; CHAIR OF GOVERNMENT AFFAIRS

Dean has been involved in governmental services, consulting or lobbying for more than 23 years. He has been practicing state and local government law since 1995, and his first clients were local government entities. He specializes in representation of governmental entities today. Dean ceased lobbying prior to his election to the Florida House of Representatives in 2004. During his time in the Legislature (from 2004 to 2012), Dean was Chairman of the Transportation and Economic Development Appropriations Committee, where he placed major emphasis on state investment in road, rail,
and port transportation infrastructure. He later served as Chairman of the Economic Expansion and Infrastructure Committee from 2008-2010, and finally as Speaker of the House from 2010-2012. After leaving the House of Representatives, Dean began his current lobbying practice in 2012 and continues today. Because of his experience as Speaker of the House and his close relationships with Legislative and Executive branch leadership, Dean will focus on interfacing with the President of the Senate and Speaker of the House as well as the Governor and Cabinet. Many of the current members of the Legislature were serving when Dean was Speaker, and he maintains excellent relationships with legislative leadership, including Senate President Bill Galvano, Speaker of the House Jose Oliva, and the designated successors to both of them. His experience with government funding, and his ties to Florida’s primary economic engine as a board member for Enterprise Florida, position him well to advocate for the Village’s economic priorities and development goals.

TEAM MEMBER KATIE FLURY
GOVERNMENT AFFAIRS CONSULTANT
Katie is a government relations consultant who focuses her practice on matters involving the Florida Legislature, the Governor, and Cabinet and state agencies. Prior to joining GrayRobinson, Katie served as a political consultant to many key members in leadership in the Florida House of Representatives, and these relationships are key to successfully advancing appropriations on behalf of the Village during a highly competitive debate about legislative priorities.

TEAM MEMBER KIM MCDougAL
SENIOR GOVERNMENT AFFAIRS CONSULTANT
As Chief of Staff to former Florida Governor Rick Scott, Kim developed significant experience, knowledge and important contacts at the highest levels of the Executive branch of government, and will bring those resources to the Team supporting the Village’s initiatives. She also represents nearly three decades of education policy experience, having served in multiple leadership roles at the Department of Education, including Governmental Relations Director and Senior Policy Advisor for several Commissioners of Education, and also as education policy advisor to Governors Bush and Scott. Her knowledge of the budget and appropriations process is extensive as are her contacts.

TEAM MEMBER KIRK PEPPER
SENIOR GOVERNMENT AFFAIRS CONSULTANT
Kirk has worked at the highest levels within the state political party structure in Florida on statewide campaigns, as a consultant and inside the Capitol. This has given him insight into the inner workings of the halls of power in Florida, along with important relationships with decision makers at every level of government throughout the state. Kirk will engage these relationships and his knowledge of agencies, programs, funding sources and government processes to support the goals and objectives of the Village. As well, he is respected as a keen strategist and will contribute to the Team’s multiple approaches to developing allies, securing funding, and achieving goals for the Village.

TEAM MEMBER JASON UNGER
SHAREHOLDER, TALLAHASSEE MANAGING DIRECTOR
Jason has lobbied for nearly 20 years and represents dozens of public and private entities before the Legislative and Executive branches of Florida government. He is intimately familiar with the challenges municipalities face when it comes to appropriations and other funding requests, and has achieved many successes on behalf of his clients. This experience makes him invaluable in the development of appropriations and grant requests on behalf of the Village. Jason also has served as Special Counsel to the Speaker of the Florida House of Representatives. He represented the Florida House of Representatives in the 2002 and 2012 redistricting cycles, and members of the Legislature in election law matters. Since
2008, Jason has served on the Supreme Court Judicial Nominating Commission (JNC), with successive nominations by Governor Charlie Crist and Governor Rick Scott. Jason served as Chair of the JNC twice, including when Governor DeSantis entered office and selected three Supreme Court Justices. His contacts throughout the Executive and Legislative branches are unequalled, and his experience representing local government interests make him a valuable asset to the Team.

4. Provide the estimated number of hours (weekly) and billing rate for each consultant team member providing services.

GrayRobinson proposes a lump sum price of $48,000 annually for performing all of the work described in the Request for Proposal. This includes unlimited hours by the Team members identified herein, as well as other members of the Government Relations and Lobbying Team who may be called upon for specific expertise to support Village goals. Other than standard annual lobbyist registration fees, we do not anticipate any additional costs incurred in performing the scope of work included in this proposal.

5. What is your firm’s experience conducting the services requested? Describe comparable services performed by your firm in the last five years, including the number of accounts, scope of service, and their status.

Annually, GrayRobinson ranks among the top lobbying firms in Florida and was just named Legal Lobbying Firm of the Year by Influence Magazine. GrayRobinson has one of the most knowledgeable teams of Florida local government relations professionals in the State, and has been serving local governments in a legal and/or lobbying capacity since 1970. GrayRobinson has a strong and widely acknowledged background in Florida’s Legislative and Executive branch government relations services, with decades of experience lobbying the Florida Legislature, both offensively and defensively, on behalf of public and private entities. Many of our attorneys and consultants began their careers serving as elected officials and as staff to the Florida Legislature, Governor’s Office, and state agencies. This experience gives our clients a unique perspective on the most efficient means of meeting their legislative goals.

In addition, we have decades of experience advising local government clients on a full range of issues and opportunities, and successfully representing our clients before the regulatory agencies of Florida, including but not limited to: the Department of Transportation, Department of Environmental Protection, Florida Building Commission, Construction Industry Licensing Board, Department of Health, Department of Financial Services, Office of Insurance Regulation, Attorney General, Department of Business and Professional Regulation, Department of Economic Opportunity, and Agency for Health Care Administration. GrayRobinson members are active in the political process, maintaining close and meaningful relationships with legislators, and key statewide and local political leaders.

GrayRobinson currently provides government affairs and lobbying services on behalf of 157 clients. The following pages include a select list of successes from the last five years that exemplify our Team’s experience, and what GrayRobinson can achieve on behalf of the Village.
CITY OF HOLLYWOOD

- Secured water project funding and worked with the Department of Environmental Protection to modify requirements that resulted in an estimated $200 million savings for the City utility.
- Successfully worked to defeat the vacation rental preemption bill after proponents refused to add “party house” language vital to the interests of the City.
- Successfully secured defeat of two harmful amendments that would have preempted the sale of domestic animals.
- Successfully lobbied Constitutional Revision Commission commissioners to defeat Proposal 95 (preemption on the local regulation of commerce, trade, and labor).
- Successfully defeated vacation rental legislation, and secured $150,000 for Emergency Center Generator.

CITY OF KISSIMMEE

- Secured $500,000 for woodside drainage.
- Secured $34,322,000 for invasive plant funding.

CITY OF PORT ST. LUCIE

- Secured $1.02 million for the McCarty Ranch Extension.
- Secured an appropriation of $180,000 from the Florida Jobs Growth Grant Fund for the design of McCarty Ranch phase 3 water reservoir. This coupled with previous legislative successes on behalf of the city marks more than $3 million in funding towards this reservoir project that will relieve nutrient flow in the C-23 Canal.
- Secured $987,000 for the Hegener Road Extension. This economic development project is a catalyst to continued development of the City’s Tradition Center for Commerce.

CITY OF ST. CLOUD

- Secured passage of local alcohol licensing bill to allow restaurants in the City’s downtown entertainment district to provide liquor service without having to obtain a full liquor license.
- Secured $300,000 for the Downtown Revitalization Project, an appropriation to support the upgraded pipe infrastructure for the City’s downtown district, as well as streetscape improvements.

CITY OF WEST PALM BEACH

- Secured $500,000 for Stormwater Improvements to Historic Pineapple Park. Although this was an environmental mitigation project, it was designed to also help spur economic development in the area.
- Secured a $500,000 Cultural Facilities Grant for the stabilization and rehabilitation of the Historic Sunset Lounge.
- Secured $300,000 for enhancements to the City’s critical incident response, including emergency vehicles and a police patrol boat.
- Successfully lobbied Constitutional Revision Commission commissioners to defeat Proposal 95 (preemption on the local regulation of commerce, trade, and labor).
- $400,000 for road improvements to the Rosemary Corridor.
- Secured $400,000 for Broadway Avenue improvements phase 1.
- Secured $450,000 for Broadway Avenue improvements phase 2.
**CITY OF APOPKA**
- Secured $1,000,000 from the Legislature in capital funds for extension of Harmon Road in the City of Apopka.

**CITY OF CLERMONT**
- Secured $450,000 for equipping the City’s world-famous bike trail network with Wi-Fi coverage to enhance public safety and tourism marketability.
- Secured $500,000 for a priority alternative water supply project.
- Secured $500,000 for Victory Pointe Westlake Westland.

**CITY OF DELTONA**
- Successfully secured a $550,000 appropriation for a brackish water test well. The intent of this appropriation was to determine the effectiveness of the treatment of standing, brackish water located within the city in order to allow for its use in irrigation and other non-potable manners. The City would have been unable to fund this project without the State’s appropriation, and has seen accelerated success in this arena because of the work we were able to accomplish on its behalf.

**CITY OF DORAL**
- Secured $447,500 for Pedestrian safety/roadway improvements for 112th Avenue.

**CITY OF FORT MYERS**
- Secured $1 million for STARS Complex Expansion Phase 1.
- Secured $500,000 for Fort Myers Billy’s Creek Restoration.
- Secured $1 million for rehabilitation and replacement of playground equipment at Centennial Park, Fort Myers’ premier public space. The funding allows for an expansion of the play area as well as creating an accessible space for children with special needs in accordance with the Park’s master plan.
- Secured $1.5 million for the joint Fort Myers/Cape Coral Reclaimed Water Project. This critical infrastructure project benefits both cities and is the result of years of negotiation to redirect Fort Myers reclaimed water away from the Caloosahatchee River to supplement Cape Coral’s irrigation needs - a win/win for local governments and the environment.

**CITY OF GROVELAND**
- Successfully elevated SR 50 project to the top of the local Metropolitan Planning List for 2020 funding and beyond, coordinating legislative support, local industry champions (primarily trucking association) and high level FDOT support, including the Secretary.

**CITY OF KEY WEST**
- Secured $50 million for the Florida Keys Wastewater Treatment Plan.
- Successfully lobbied for the passage of the Florida Keys Stewardship Act. The Act adds Key West to the list of eligible areas for which Everglades restoration bonds may be issued, and expands the range of potential uses for
the funds. In addition, the bill allocated a minimum of $5 million annually to the Florida Keys Area of Critical State Concern beginning FY 2016-2017 through FY 2026-2027.

- Secured $1 million for the City of Key West’s Vandenberg Project to purchase and sink the U.S.S. Vandenberg off the coast of Key West. The sinking of the U.S.S. Vandenberg led to increased tourism to the area by the recreational fishing and recreational diving industries.
- Secured $277,650 for the Reef Pumpout Program.
- Secured $5 million in Florida Forever funding for Areas of Critical State Concern.
- Secured two-hour meeting with Division of Emergency Management Director Jared Moskowitz and senior staff to rectify Keys Electric reimbursement issues stemming from Hurricane Irma.
- Successfully lobbied the Governor’s office to help secure a veto of House Bill 771, which among other provisions would have preempted a local government’s authority to prohibit the use of single-use plastic straws.
- Successfully lobbied to defeat a Senate proposal that would have barred Visit Florida from promoting communities that have banned certain sunscreens, such as the City of Key West.
- Successfully amended the tree trimming preemption bill to exempt the delegated authority for mangrove protection and worked to defeat the bill after the Senate would not concur with the House language.
- Successfully helped defeat Senate Bill 1828, which would have handicapped the City’s emergency operations and increased liability to the City and Keys Electric.
- Helped secure $50 million for the Florida Keys Wastewater Treatment Plant.

CITY OF NEPTUNE BEACH

- Secured $375,000 for Florida Boulevard Stormwater Culvert Improvements in the City’s downtown core.

CITY OF NEW SMYRNA BEACH

- Secured $250,000 for Islesboro Stormwater Management Plan through the appropriations process.

CITY OF OCOEE

- Secured legislative approval in the final budget of $50,000 through the appropriations process for multi-jurisdictional law enforcement training facility capital costs, and secured approval in the final budget of $500,000 through the appropriations process for the Franklin Street Trail project.
- Secured $50,000 for capital costs related to a multi-jurisdictional law enforcement training facility.

CITY OF OVIEDO

- Leveraged relationships within the FDOT to secure and expedite state funding for a major road project in the city that lacked sufficient dollars to complete Phase 1 and begin Phase 2.
- Successfully secured a legislative appropriation of $100,000 for the City’s planned redevelopment of the old city post office to create a community center and passive trail head.
- Secured defeat of legislation aimed at reclassifying rural settlement districts located within three miles of State University System Institutions that could have undercut local control of land use classifications and regulations.
- Secured $500,000 for a regional stormwater pond to both alleviate flooding issues within the City, and assist in reducing TMDL pollutants in Lake Jessup.

**CITY OF WINTER PARK**
- Successfully worked to defeat the tree trimming preemption bill.
- Successfully lobbied Constitutional Revision Commission commissioners to defeat Proposal 95 (preemption on the local regulation of commerce, trade, and labor).

**GULF COUNTY**
- Secured $1M in funding for revetment and erosion control installation on Cape San Blas Road.
- Secured $900,000 in funding for Gulf County to assist in infrastructure repairs following Hurricane Michael.
- Secured $6M in funding for infrastructure improvements and deepening at the Port of St. Joe.

**HENDRY COUNTY BOARD OF COUNTY COMMISSIONERS**
- Secured $1 million for Phase II of the force main wastewater infrastructure on US-27/SR-80.

**LAKE COUNTY**
- Secured $450,000 for CR 466A Phase 3 construction. This project will complete the widening of 466A between the Villages and Lake County.
- The County sought at least $5 million and up to $10 million for improvements to its Citrus Grove Road. After working with FDOT and the House and Senate Transportation Economic Development Chairs, the GrayRobinson Team successfully secured $10 million for the completion of this project.
- Secured $750,000 for CR 437 Realignment from Central Avenue to SR 46. This project will serve to provide additional transportation options in the ever-growing Lake County area.
- Secured $7,000,000 in funding from the legislature through the budget process for Lake’s County Road 437 widening project.

**LEE COUNTY**
- Secured $300,000 for the Lee County Sunniland/Nine Mile Run Drainage Improvement Project.

**MIAMI DOWNTOWN DEVELOPMENT AUTHORITY**
- Secured $300,000 for South Florida Behavioral Health Network’s Involuntary Outpatient Services Demonstration.
- Successfully defeated legislation expanding the use of underground utility markings and restricting a local government’s ability to regulate same.
ORANGE COUNTY AND ORLANDO ECONOMIC PARTNERSHIP

- On behalf of Orange County and the Orlando Economic Partnership, successfully defeated an effort to require a two-thirds vote to pass any/all future county surtax referendums during final negotiations between the House and Senate. The final version of bill requires that any county referendums be held on the general election date, but only a simple majority is required for passage.

VOLUSIA COUNTY

- In defense of the sovereignty of Home Rule, we secured defeat of legislation that would have preempted a county from charging a fee for medical examiner services. We secured defeat of legislation that would have rewritten Certificate of Public Convenience and Necessity (COPCN) laws in a way that was not in the best interest of counties already operating a coordinated system; and worked in consultation with the Florida Association of Counties to successfully defeat legislation that would have altered the way county constitutions were elected statewide. We also successfully positioned Volusia County as a thought leader and influential advocate on matters of water policy, springs protections, conservation, and home rule.
- Successfully secured a legislative appropriation of $2,950,000 for the expansion/widening of Williamson Road.
- Secured $2,000,000 in Florida Job Growth Grant funding from the Legislature, approved by the Governor, also for the widening of Williamson Road.
- Secured a legislative appropriation of $3 million for the Daytona Beach International Airport to invest in infrastructure improvements on the south side of the airport to prepare the property for high-end private capital investment.

CENTRAL FLORIDA REGIONAL TRANSPORTATION AUTHORITY (LYNX)

- Our Team was integral in the passage of the Charter County Transit Surtax amendment for LYNX, to ensure that Orange County had the option to levy its own transportation tax (by voter referendum) to provide a permanent funding source for public transportation.

HILLSBOROUGH COUNTY AVIATION AUTHORITY

- GrayRobinson secured a visit to Tampa International Airport by Governor DeSantis with a press conference on the economic impact numbers of international flights at TIA and importance of Visit Florida funding and investment; event also included small roundtable discussion with the governor and key airport stakeholders, staff, and board members.
- Our Team successfully fought for reauthorization of Visit Florida (for one additional year) and for $50 million in funding. This effort included direct lobbying of the Governor, Senate, and House, as well the many stakeholders engaged in Florida’s tourism industry.
- Successfully stalled legislation related to Luxury Ground Transportation Network Companies that would have created significant curbside confusion and potential revenue loss for the County.
The previous list was selected to showcase successes from public sector client work. Below is a comprehensive list of current GrayRobinson Government Relations and Lobbying clients. Should you be interested in obtaining further information about any of them, please let us know.

GRAYROBINSON - FLORIDA LEGISLATIVE AND EXECUTIVE BRANCH LOBBYING CLIENTS

- ACS Infrastructure Development, Inc.
- Allergan USA, Inc.
- Alliance for Safety and Justice, a project of the Tides Center
- Aramark Correctional Services, LLC
- Arnie’s Army Charitable Foundation, Inc.
- Associated Builders & Contractors of Florida, Inc.
- Atlantic Housing Partners LLP
- Automated Health Systems, Inc.
- AvMed, Inc.
- Bayfield Mitigation
- Boy Scouts of America, Inc.
- Brown & Brown, Inc.
- Brown and Caldwell
- Camelot Community Care Inc.
- Canaveral Port Authority
- Casa Valentina
- Cassidy Holdings, LLC
- Cellebrite
- Centene, DBA Sunshine Health
- Central Florida Hotel & Lodging Association
- Central Florida Regional Workforce Development Board
- Central Florida Zoo & Botanical Gardens
- Centurion Managed Care
- ChildNet, Inc.
- City of Casselberry
- City of Clermont
- City of Fort Myers
- City of Greenacres
- City of Groveland
- City of Hollywood
- City of Key West
- City of Kissimmee
- City of Lakeland
- City of Orlando
- City of Oviedo
- City of Port St. Lucie
- City of St. Cloud
- City of Tallahassee
- City of West Palm Beach
- City of Winter Park
- College of Central Florida Foundation, Inc.
- Conservation Florida
- CORE Construction Services of Florida, LLC
- Cornerstone Hospice & Palliative Care
- Crystal Lagoons U.S. Corp.
- Deloitte Consulting, LLP
- Devereux Foundation, Inc.
- Dewberry Engineers, Inc.
- Disasters, Strategies & Ideas Group, LLC
- Dosal Tobacco Corporation
- ERM Strategies
- Eskimo Hut Worldwide
- Florida Academy of Physician Assistants
- Florida Association of Agencies Serving the Blind
- Florida Association of the American Institute of Architects
- Florida Association of Counties
- Florida Association of Insurance Agents
- Florida Association of Rehabilitation Facilities
- Florida Association of Roofing Professionals (FRSA)
- Florida Brownfields Association, Inc.
- Florida Distillers Guild, Inc.
- Florida Library Association
- Florida Municipal Electric Association
- Florida Municipal Power Agency
- Florida Nurses Association
- Florida Outdoor Advertising Association
- Florida Roofing & Sheet Metal Association
- Florida School Boards Association
- Florida Society of Health-System Pharmacists, Inc.
- Florida Society of Oral and Maxillofacial Surgeons
- Florida Surety Association
- Florida’s Vision Quest
- FMSbonds, Inc.
Focus School Software  
Frito-Lay, Inc.  
Gannett Fleming, Inc.  
Gatorade  
Give Kids the World  
Gulf County  
Gulf Power Company  
Hendry County Board of County Commissioners  
Hendry County Economic Development Council  
Hillsborough County Aviation Authority  
Hillsborough County Public Schools  
IMG College, LLC  
Islamorada Village of Islands  
Jetro Rd Inc. D/B/A Restaurant Depot  
JPMorgan Chase Holdings LLC  
Laboratory Corporation of America  
Lake County  
Lake County School Board  
Lake Monroe Waterfront and Downtown Sanford CRA  
Leisure Resorts, Inc.  
Levy County School Board  
LifeLink Foundation, Inc.  
Lockheed Martin Corporation  
MACTown, Inc.  
Management & Training Corporation  
Melbourne Airport Authority  
Metro Orlando Economic Development Commission  
Miami Bridge Youth and Family Services, Inc.  
Miami Dolphins  
Miami Downtown Development Authority (MDDA)  
Miami-Dade County  
Miami-Dade Expressway Authority (MDX)  
Monroe County Board of County Commissioners  
Mush, Inc.  
National Association of Industrial & Office Properties  
National Lightning Protection Corporation  
Nelson & Company, Inc.  
Non-Profit Insurance Services, Inc.  
NORESCO, LLC  
OneBlood, Inc.  
On-Street Media Florida, Inc.  
Oracle America, Inc.  
Orange County Clerk of Courts  
Orange County Government  
Orange County Library District  
Orange County Sheriff  
Orlando Economic Partnership, Inc.  
Orlando Magic  
Paul Fraynd  
Palm Beach County Sheriff’s Office  
PDCS, LLC  
Pepsi Bottling Company  
Pepsi Cola North America  
PepsiCo  
Psychological Addiction Services  
Public Consulting Group  
Quaker Foods & Beverages  
Rave Mobile Safety  
RB Jai-alai, LLC  
Riverstone Claims Management LLC  
Rx Development Associates, Inc.  
RD Management  
Santa Fe College Foundation  
SantaFe Healthcare, Inc.  
SantaFe Senior Living, Inc.  
SanusCBD LLC & SanusLeaf LLC  
Sarasota Memorial Health Care System  
SAS Institute, Inc.  
School Board of Broward County  
Seavin, Inc.  
Self-Storage Association  
Shands Teaching Hospital and Clinics, Inc.  
Sodexo, Inc.  
South Broward Hospital District  
South Central Florida Express, Inc.  
Southern Gardens Citrus Groves Corporation  
Southern Gardens Citrus Holding Corporation  
Southern Gardens Citrus Nursery Corporation  
Southern Gardens Citrus Processing Corporation  
St. Augustine Distillery  
St. Lucie County School Board  
Star Insurance Company  
STEPS, Inc.  
Study Edge  
Sysco Corporation  
Target Corporation  
The American Law Institute  
The Villages  
Transition House, Inc., The
6. Comment on other areas that may make your firm different from your competitors.

LARGE-FIRM RESOURCES, WITH SMALL-FIRM CLIENT SERVICE AND COST-EFFICIENCY

Our clients have access to the resources of a large firm, as needed; but we provide the customized, personalized client service traditionally found in smaller firms. We have a history and culture of responding to clients and their needs with nimbleness and cost-efficiency. Each office is led by a Managing Shareholder, who oversees the office and its attorneys, plus staff and other professionals, in multiple specialties. With the support of the latest technology, our attorneys, government relations professionals, lobbyists, paralegals, consultants, and staff also work seamlessly as teams and in configurations across all GrayRobinson offices, providing our clients with the best experienced and most appropriately qualified professionals for the matter at hand. This brings to bear professionals with the credentials, contacts, and expertise most appropriate to accomplish a client’s goals as efficiently and expeditiously as possible.

LOCAL GOVERNMENT IS OUR PASSION

The Firm is a corporation founded in Orlando with its roots firmly planted in service to clients in the public sector. Our founder, Charlie Gray, served for years as County Attorney for Orange County, and many GrayRobinson attorneys, lobbyists, and consultants began their careers working in city and county legal and government staff positions. For almost 50 years, GrayRobinson has been proud to represent local governments on a wide range of matters, and our long list of successes, including legislative successes on behalf of local government clients, speaks to our familiarity with local government issues, and productively managing the tension that naturally exists between state and local priorities.

WE KNOW NEW VILLAGE NEEDS

Gray Robinson has the notable and unique distinction of having been behind the legislative push to secure approval of the incorporation of the Village of Estero. We successfully secured passage of Estero’s enabling legislation, and the Village of Estero was incorporated on December 31, 2014. GrayRobinson attorney Burt Saunders, who previously had served as a Collier County Commissioner, and served multiple terms in the Florida House of Representatives and Florida Senate, was appointed as the first Estero Village Attorney in March 2015. Burt continues to practice Government, Government Affairs & Lobbying, and Land Use law at the Firm, and he also continues to serve as Estero’s Village Attorney. Thus we remain connected to and engaged with Estero’s growth and development, its issues and challenges. This gives us an intimate and immediate understanding of many of the Village of Indiantown’s needs and priorities. The Team presented in this proposal and the Firm at large understand how state and local government work, what local communities value and need, and that’s what we deliver.
WE STAND FOR HOME RULE

Local government and the preservation of home rule are built into the DNA of GrayRobinson. We have been on the frontlines of preemption issues for decades and have had widespread success in preserving local control for our clients. Because we represent the Florida Association of Counties, we are engaged in essentially every issue affecting home rule, and are in the advantageous position of being able to identify and enlist coalition members that would be beneficial to the Village earlier than other firms would be. Some of the high profile issues we have been and are actively involved in include:

- The Team was engaged jointly by the Florida League of Cities, Florida Association of Counties, and Florida School Boards Association to lead a coordinated strategy to prevent the Governor and Legislature from reacting unnecessarily to property tax increases accumulated from 2000 to 2007. The Firm assisted in successfully negotiating a position between the Governor and the Senate President that imposed reasonable caps while maintaining local governments’ ability to make necessary decisions at home.

- On behalf of the Florida Association of Counties, GrayRobinson is tasked with assisting with initiatives to help ensure that Florida’s 67 counties remain free to perform vital public services. We focus our efforts on strengthening and preserving county home rule by leveraging our relationships with Legislative contacts and like-minded partners. We are constantly monitoring initiatives, proposed bills and language that could be detrimental to home rule, and educating lawmakers and regulators alike that counties themselves know what’s best in serving their communities.

- On behalf of the City of Orlando, GrayRobinson lobbied for economic development, transportation, home rule, and public safety issues.

- The Team represents several statewide local government associations and multiple local governments. As a result, we are consistently and integrally involved in all attempted transgressions of home rule. The 2016 Session spawned multiple, unprecedented attempts at preemption. The Team was instrumental in convincing a House Committee Chair to abstain from hearing House Bill 17. We also played a key role in the final defeat of legislation that opened up a two-year agreement relating to vacation rentals.

- On behalf of Volusia County, we successfully secured defeat of legislation that would have preempted a county from charging a fee for medical examiner services; successfully defeated legislation that would have rewritten COPCN laws in a way that was not in the best interest of counties already operating a coordinated system; and, successfully defeated legislation that would have altered the way county constitutions were elected statewide. While Volusia, due to the way the bill was written, would have been exempt given the origins of its charter, we worked in consultation with the Florida Association of Counties to secure defeat of the bill.

- We successfully lobbied the Governor’s office to help secure a veto of House Bill 771, which among other provisions would have preempted a local government’s authority to prohibit the use of single-use plastic straws.

- On behalf of Volusia County, secured defeat of several legislative proposals to amend Florida’s Constitution related to the selection and duties of constitutional officers which, if passed by the legislature and voters, would have undermined the Volusia Charter and significantly altered the county’s legislatively-created voter-approved structure.

WE DEFEND CHARTER GOVERNMENT

GrayRobinson understands the intricacies and the importance of planning, coordinating, and directing the legal activities of government entities with charter forms of government perhaps better than any law firm in Florida. Our founder, Charlie Gray, served for years as County Attorney for Orange County, and many GrayRobinson attorneys and consultants began their careers working in city and county legal and government positions. For almost 50 years, GrayRobinson has been proud to represent local governments on a wide range of matters. GrayRobinson also has a number of attorneys who have provided legal representation for counties undergoing charter review processes.
Charters can be used to change elections, change forms of government, and can themselves be subject to legal challenges, including their own validity. Inevitably, a charter can be used as a sword, and sometimes a shield. It is a county’s constitution. In times when people seem to want change for the sake of change, charter governments, or outcomes from a charter review process, may be influenced by emotions or outside forces unless a commission is prepared to defend its home rule and the rule of the people with the rule of law. Very few law firms can say that they know about charter governments and their processes based on experience working with them from the inside. But GrayRobinson has just such experience, having served as legal counsel for many Charter Review Commissions - and we have extensive experience working with charter governments in Florida counties across the state.

**SIGNIFICANT GRANT FUNDING SUCCESS**

Our Team has significant experience securing timely approval of grant applications and reviewing documents related to funding request applications. Below are just a few examples of how we have assisted in the successful application for and the award of funds for our public entity clients:

<table>
<thead>
<tr>
<th>Year</th>
<th>Entity</th>
<th>Grant Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>Melbourne Airport Authority</td>
<td>$4,000,000</td>
<td>Secured $4 million for infrastructure improvements at Orlando Melbourne International Airport through Florida Job Growth Grant Fund, with FL DEO and Enterprise Florida, Inc.</td>
</tr>
<tr>
<td>2019</td>
<td>Florida Library Association and Miami-Dade County</td>
<td>$1,000,000</td>
<td>Secured $1,000,000 in nonrecurring funds for the Library Construction Grants program in the Department of State.</td>
</tr>
<tr>
<td>2019</td>
<td>Florida Library Association</td>
<td>$4,500,000</td>
<td>Secured a $4.5 million increase in State Aid to Public Libraries grant program through Florida Department of State.</td>
</tr>
<tr>
<td>2019</td>
<td>Gulf County</td>
<td>$25,000,000</td>
<td>Secured a $25 million appropriation to establish the Hurricane Michael Recovery Grants program to assist local governments with infrastructure repairs following the devastating 2018 storm. The grants will be administered through a competitive program administered by DEO and approved by the Legislative Budget Commission.</td>
</tr>
<tr>
<td>Year</td>
<td>Location</td>
<td>Amount</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------</td>
<td>------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2017/18</td>
<td>Canaveral Port Authority</td>
<td>$50,000,000</td>
<td>The Firm successfully worked to have a grant application valued at over $50 million included in the top three preferred grant recommendations from the FDOT to the United States Department of Transportation, for consideration of an Infrastructure for Rebuilding America (&quot;INFRA&quot;) grant.</td>
</tr>
<tr>
<td>2017/18</td>
<td>Canaveral Port Authority</td>
<td>$8,245,000</td>
<td>Secured an $8,245,000 Florida Job Growth Public Infrastructure Grant from the Florida Department of Economic Opportunity.</td>
</tr>
<tr>
<td>2017/18</td>
<td>City of Port St. Lucie</td>
<td>$3,003,247</td>
<td>Secured a $3,003,247 Florida Job Growth Public Infrastructure Grant from the Florida Department of Economic Opportunity.</td>
</tr>
<tr>
<td>2018</td>
<td>City of Port St. Lucie</td>
<td>$600,000</td>
<td>Secured Outdoor Legacy Grants (federal funds) by working with Florida Department of Environmental Protection to find alternative sources of funds, due to the inability of State to apply for federal grants.</td>
</tr>
<tr>
<td>2017/18</td>
<td>Volusia County</td>
<td>$1,961,564</td>
<td>Secured a $1,961,564 Florida Job Growth Public Infrastructure Grant from the Florida Department of Economic Opportunity.</td>
</tr>
<tr>
<td>2016</td>
<td>City of West Palm Beach</td>
<td>$500,000</td>
<td>Secured a $500,000 Cultural Facilities Grant for the stabilization and rehabilitation of the Historic Sunset Lounge from the Florida Department of State.</td>
</tr>
<tr>
<td>2015</td>
<td>Cities of Kissimmee, Orlando, Winter Park</td>
<td>$10,000,000 pot with 50% match</td>
<td>The Firm successfully advocated for the creation of a new matching grant program for the development of quiet zones with the FDOT.</td>
</tr>
<tr>
<td>2012/13</td>
<td>City of Marathon</td>
<td>$727,000</td>
<td>The Firm assisted the City of Marathon in obtaining an Economic Development Grant (one of the first in the state), and drafted the corresponding sub-recipient grant agreement with a non-profit entity for the proposed construction of a zip-line project.</td>
</tr>
</tbody>
</table>

**NAMED FLORIDA LEGAL LOBBYING FIRM OF THE YEAR**

Annually, GrayRobinson ranks among the top lobbying firms in Florida and was just named Legal Lobbying Firm of the Year by Influence Magazine. GrayRobinson is the only organization among the top lobbying firms that is also a full-service, statewide law firm. The combination of our lobbying proficiency and legal acumen enables us to provide exceptional, unique services.
service to our clients. GrayRobinson offers big-firm contacts and resources with the responsive, personalized client service traditionally found in smaller firms. It’s the best of both worlds.

Our Team is comprised of numerous attorneys and governmental consultants throughout the state. We work collaboratively at the local government level and at the Legislative, Executive branch and Cabinet levels in Tallahassee year-round. By leveraging our statewide presence and our years of experience, GrayRobinson maintains an ongoing, intimate knowledge of what is happening in the Legislative and Executive branches of state government at all times.

**WE OFFER VALUE ADDED SERVICES**

Value-added services we offer to our clients include the following:

- **Training:** GrayRobinson regularly provides our clients with training sessions for executive leadership, management, employees, and/or in-house counsel. GrayRobinson lobbyists and attorneys are happy to provide training programs on topics of interest to the Village, via live seminar or webinar.

- **Leveraging Community Leader Forums.** GrayRobinson hosts internal seminars and Community Leader Forums (CLFs) frequently in our offices throughout the state. We bring together clients, political leaders, attorneys, lobbyists, and friends of the Firm to hear high-profile business leaders, community leaders, and elected officials discuss issues of importance to business and to the State of Florida. We also would use these opportunities to introduce Village leadership to contacts outside the political realm.

- **Electronic Advisories (“E-lerts”) and Legal Updates.** GrayRobinson professionals regularly publish Email updates on regulatory issues, changing legislation, and new case decisions that are timely and specific to our clients’ municipalities, business interests, and/or industries.

- **Secure extranet access to billing, research or other information online.** We can create a protected Village extranet that can be accessed at any time, from anywhere.

**C. Qualifications and Experience of Proposed Project Team**

1. **Describe the qualifications of staff proposed for the assignment, position(s) in the firm, and types and amount of equivalent experience. Be sure to include any municipal agencies they have worked with in the past three years and their level of involvement. A description of how overall supervision will be provided should be included.**

GrayRobinson’s government relations and lobbying professionals have represented and served as: Members of the United States Congress, senior staff to Members of Congress, and, Speakers of the Florida House of Representatives; have served as staff to and/or represented: multiple Florida Governors, Legislators, Attorneys General, the Florida House of Representatives, the Florida Senate, state agencies, and numerous cities and counties. Because of our outstanding relationships with elected and appointed officials at the local, state, and federal levels, we have successfully represented hundreds of clients before Florida and United States governmental entities on everything from legislative policy and appropriations to procurement, professional regulatory practice, and licensing. The proposed GrayRobinson Team has the knowledge and long-term experience essential to preparing legislation — both general bills and amendments — identifying funding sources, and successfully shepherding specific appropriations through the House, Senate, and Governor’s office. As importantly, the Team is just as skilled in securing the defeat of unfriendly legislation and attempts to reduce or eliminate appropriations line items, proviso language, and any other actions that could be detrimental to our clients.
We also have decades of experience successfully representing our clients before the regulatory agencies of Florida, including but not limited to: the Department of Transportation, Department of Environmental Protection, Florida Building Commission, Construction Industry Licensing Board, Department of Health, Department of Financial Services, Office of Insurance Regulation, Attorney General, Department of Business and Professional Regulation, Department of Economic Opportunity, and Agency for Health Care Administration. The GrayRobinson Team indicated herein has lobbied on behalf of numerous municipal agencies during the past three years. GrayRobinson Team members are active in the political process, maintaining close and meaningful relationships with legislators, and key statewide and local political leaders.

About The Team

GrayRobinson will utilize a team approach designed to maximize communication and responsiveness to the Village’s needs. As mentioned before, the primary lobbying leads at GrayRobinson for all work done on behalf of the Village will be Christopher Carmody and Joseph Salzverg. They will direct the efforts of the Firm and be accountable for all work executed. In addition, Dean Cannon, Katie Flury, Kim McDougal, Kirk Pepper, Robert Stuart and Jason Unger will serve as the primary Team for the Village’s representation. Each of these Team members has worked intensely, one hundred percent hands-on, to accomplish the successes for their share of the public entity/municipal clients detailed on pages 12-16.

To ensure the Village’s matters are completed efficiently and promptly, from time to time management of particular projects may be delegated to one of the Team members. However, oversight of and accountability for the Village’s matters will rest with Chris and Joseph. The Team works closely, shares information and updates with one another, multiple times per day during Session on key and need-to-know information pertaining to client priorities. Other information is shared amongst the Team about client-specific opportunities, intelligence for specific clients from those monitoring key committee actions, reading reports and meeting with key contacts as well as calling for meetings and presentations. All of this information is at the fingertips of the Team Leaders who direct it to clients in a timely and useful presentation.

Short snapshots about Team members and their roles can be found on pages 9-11. Detailed bios can be found on pages 26-43. Every member of our Team will be available to support the Village in achieving its goals. Bottom line: we will leave no stone unturned and no lobbyist unengaged to get the job done.

Please find the GrayRobinson Team organizational chart on the following page.
GRAYROBINSON TEAM - VILLAGE OF INDIANTOWN

TEAM CO-LEADER
CHRIS CARMODY
Orlando, FL
Appropriations, Policy, Economic Development

TEAM CO-LEADER
JOSEPH SALZVERG
Miami, FL
Appropriations, Policy, Partner Development

TEAM MEMBER
DEAN CANNON
Tallahassee, FL
Legislature, Executive Agencies, Budget, Economic Development

TEAM MEMBER
KATIE FLURY
Orlando, FL
Appropriations, Budget, Key Meetings, Grants

TEAM MEMBER
KIM MCDUGAL
Tallahassee, FL
Appropriations, Budget, Executive Agencies, Policy

TEAM MEMBER
KIRK PEPPER
Tallahassee, FL
Appropriations, Executive Agencies, Grants

TEAM MEMBER
ROBERT STUART
Orlando, FL
Appropriations, Agencies, Economic Development

TEAM MEMBER
JASON UNGER
Tallahassee, FL
Appropriations, Budget, Policy, Judiciary
2. Identify and provide the resume(s) of the personnel who will be assigned to this project.

**CO-TEAM LEADER**

Christopher L. Carmody, Jr.

Shareholder
Orlando/Tallahassee
chris.carmody@gray-robinson.com

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Phone: 850-577-9090
Direct: 352-514-2196
Fax: 850-577-3311

**Experience**

Chris earned his certification as a Designated Professional Lobbyist from the Florida Association of Professional Lobbyists and is an attorney admitted to practice in all Florida state courts. He has substantial experience handling government relations matters, including representation before the Florida Legislative and Executive branches, purchasing and procurement appeals, and professional licensing. Chris’s clients range from small cities to Fortune 500 companies, and his experience runs the gamut of state-level needs and issues, from the passing of landmark legislation to proficiency on the appropriations process.

Chris also practices in litigation, land use, construction and sports law. His practice includes obtaining state and local government regulatory approvals as well as matters related to the acquisition, development and utilization of real property. He has represented contractors, engineers, architects, developers, owners, subcontractors, and suppliers in issues relating to land use and construction law. Chris provides legal work to the Central Florida Sports Commission and has handled numerous high-level sports matters at the Legislative level, including tax exemptions, workers’ compensation and other matters that affect sports franchises.

**Areas of Practice**

- Government Affairs & Lobbying
Background
Chris was born and raised in Orlando, Florida. He graduated from Bishop Moore Catholic High School in 1998. Four years later, he received his undergraduate degree in political science from the University of Florida, with a minor in human nutrition. While at UF, Chris was active in student government activities and regularly attended both football and basketball games.

In 2005, Chris graduated from the University of Florida Levin College of Law. During law school, Chris interned at the Florida Supreme Court for The Honorable Raoul G. Cantero. He also researched under Dean Jon Mills in the Center for Governmental Responsibility. He was a member of the Justice Campbell Thornal Moot Court Board and in his final semester served as president.

Education
  - Senate President, Student Government
  - Florida Blue Key
  - Hall of Fame
  - Phi Beta Kappa
- **University of Florida Levin College of Law, J.D.** (2005)
  - Justice Campbell Thornal Moot Court Board
    - President
    - Regional Champion, Thomas Tang National Moot Court Competition
  - Vice President, Florida Blue Key
  - Intern, Honorable Raoul G. Cantero, Florida Supreme Court
  - Research Assistant, Center for Governmental Responsibility
  - Order of the Barristers
  - Chair, Class Gift Committee
Admissions

- Florida
- U.S. District Court, Middle District of Florida
- U.S. Court of Appeals, 11th Circuit

Professional Associations & Memberships

- The Florida Bar
  - Chair, 2016-2017
- Orange City Bar Association
- Inns of Court
- Florida Association of Professional Lobbyists, Designated Professional Lobbyist

Awards & Recognition

- Insight 100: Central Florida’s Most Powerful, *East Orlando Post*, 2016
- University of Florida Alumni Association "Leader of the Year," 2012-2013
- Florida *Super Lawyers*, "Rising Star," 2009-2018
- Central Florida 100, *Orlando Sentinel*, 2015
- *Florida Trend*, Legal Elite, 2015-2016
  - Up and Comer, 2011-2013
- Eagle Scout Award, Troop 76, Orlando, Florida

Civic

- Kissimmee/Osceola City Chamber of Commerce, Board of Directors, 2013-present
- Seminole City Chamber of Commerce, Board of Directors, 2013-present
- Central Florida Gator Club, President, 2012-2014
- City of Orlando, Certification Board, 2012-2015
- IDignity, Board Member, Chair, 2015-present
- Frederick Leadership Initiative, Co-Chair
- Junior Achievement Professional Connection, Classroom Teacher
- Tiger Bay, Board Member, President, 2014
- Business Force, Board Member
- University of Florida Law Alumni Council, Member
  - Regional Vice President, 2014-present
- Connect Florida Leadership Institute, Class I
College Leadership Florida, Class VII
Orange City Young Republicans, Former President
Central Florida Boy Scout Council, Vice Chair, Golden Eagle Dinner
Central Florida Partnership, Young Professionals Advisory Board, Co-Founder; Former Chair
Leadership Seminole, Class 19
Leadership Orlando, Class 73

Articles & Publications

Presentations & Seminars
Emcee, “Legislative Update,” Seminole County Regional Chamber of Commerce, May 16, 2019
Panelist, “Get Ready for the 2018 Election – What’s on the 2018 Ballot and What Does it Mean?” Orlando Regional Chamber’s Business Leadership Roundtable, September 25, 2018
Presenter, Seminole County Regional Chamber of Commerce, Good Morning Seminole, August 2, 2018
Panelist, “2018 Florida Legislative Review,” Jacksonville Session Wrap Up, April 18, 2018
Panelist, “2018 Florida Legislative Review,” Orlando Session Wrap Up, March 29, 2018
Panelist, “2017 Florida Legislative Review,” Jacksonville Session Wrap Up, June 8, 2017
Presenter, The Florida Bar Environmental & Land Use Law Section Webcast Series, February 23, 2017
Presenter, Developers Council Annual Legislative Update, Greater Orlando Builders Association (GOBA), Orlando, Florida, June 25, 2015
Experience

Joseph is a first generation American and the son of Cuban refugees who was raised in Miami-Dade County and ran numerous successful political campaigns in mostly Spanish-speaking districts. Joseph maintains close relationships with those many local and state-level elected officials, as well as with the Hispanic Caucus in Tallahassee. He regularly advocates for his clients on issues related to transit, home rule, affordable housing, emergency operations, professional licensure, and vessels and waterways. He has extensive experience working with the Florida Department of Transportation, Department of Business and Professional Regulation, Division of Emergency Management, Department of Economic Opportunity, Department of Environmental Protection and the Fish and Wildlife Commission. Joseph is intimately familiar with South Florida’s political and public policy processes and procedures, and the complex issues faced by local government, businesses and non-profits. He recognizes the scope of these issues and the vast number of organizations tasked with coordinating the planning and execution of initiatives to tackle the major challenges facing municipalities today. He applies that experience and knowledge as he lobbies Florida’s Legislative and Executive branches of government in areas including: appropriations, growth management, local government, healthcare, insurance, regulated industries, transit, and utilities.

Joseph also represents clients before local governments on procurement, land use, and general government matters. Joseph has very close relationships with several members of the Miami-Dade Legislative Delegation dating back to the 2010 election cycle, when he served as a campaign manager and political consultant on their successful campaigns. He continues to enjoy very productive relationships with all members of the delegation. Joseph served as a Legislative Analyst on the Regulatory Affairs Committee in the Florida House of Representatives, where he was responsible for researching, analyzing, and drafting proposed legislation related to banking and insurance regulation, business and professions regulation, and energy and utilities regulation.
Areas of Practice

- Administrative & Regulatory
- Government
- Government Affairs & Lobbying
- Land Use Law

Education

- University of Miami, B.A. political science and business administration (2010)
- Florida State University College of Law, J.D. (2015)
  - College of Law Cuban American Bar Association
    - Founder, 2012; President, 2012 - 2015
  - Jewish Law Student Association
    - Founder, 2012; Vice President, 2012 - 2015
  - The Justice Raoul G. Cantero, III Diversity Enhancement Scholarship, Recipient

Admissions

- Florida

Professional Associations & Memberships

- The Florida Bar
  - Governmental and Public Policy Advocacy Committee
- Cuban American Bar Association

Languages

- Proficient in Spanish

Awards & Recognition

- “30 Under 30 Rising Star,” Florida Politics, 2014
Dean Cannon
President and Chief Executive Officer
Chair of Government Affairs
dean.cannon@gray-robinson.com

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Tallahassee, Florida 32301
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Experience
A fifth-generation Floridian, Dean Cannon began his career as a lawyer in Orlando, practicing state and local government law since 1995. From the Panhandle to the Keys, he has represented clients before local, regional and state government entities. He has also represented cities and counties and quasi-governmental authorities, as well as local governments on issues ranging from electric and wastewater utilities to land-use and administrative law.

Dean served in the Florida House of Representatives from 2004 until 2012. During his eight-year tenure, he played pivotal roles in property tax reform, growth management reform, health care and Medicaid reform, and major transportation infrastructure policy initiatives, among many others. He was selected by his peers to become Speaker of the House for the 2010 to 2012 term and is credited with leading the Florida House effectively during a time of great economic and political challenge.

Dean’s legislative and executive branch lobbying experience includes representing private clients and local government entities on issues including transportation, education, health care, insurance and appropriations matters. He has also handled civil litigation, administrative law, and regulatory matters before the Division of Administrative Hearings, and appellate matters before district courts of appeal and the Florida Supreme Court. Because of his background as a local government lawyer, Dean developed particular expertise lobbying on behalf of local governments, regional government entities, and local government-related associations. His first lobbying clients in the mid-1990s were municipalities in Central Florida, and after leaving the House of Representatives in 2012, he resumed his lobbying practice with an emphasis on representing local governments as part of his overall portfolio.

Areas of Practice
- Government Affairs & Lobbying
- Government
- Administrative & Regulatory
- Insurance Transactional & Regulatory
- Election Law
- Litigation
Background
Dean served as general counsel to the Orange County Charter Review Commission in 2000 and previously represented the City of Orlando before the Florida Legislature and the executive branch. Dean lives in Tallahassee with his wife, Ellen, and their three children, Dean III, Katherine and Sarah.

Education
- University of Florida, B.S. telecommunications management [1989]
  - UF Student Senate, 1987-1988
  - UF Hall of Fame, 1989
- University of Florida Levin College of Law, J.D. [1992]
  - Florida Blue Key, Vice President, 1990
  - Student Body President, 1991-1992

Admissions
- Florida

Professional Associations & Memberships
- The Florida Bar
- Florida Association of Professional Lobbyists

Awards & Recognition
- Florida Politics, Florida Politician of the Decade, 2010-2020
- Florida Trend, Florida’s 500: Florida’s Most Influential Business Leaders, 2019
- AV Preeminent™ rated by Martindale-Hubbell

Civic
- Kissimmee/Osceola County Chamber of Commerce
Katherin Flury*
Government Affairs Consultant
katie.flury@gray-robinson.com

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Orlando, Florida 32801
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Fax: 407-244-5690

Experience
Katie is a government consultant in GrayRobinson’s Orlando office. She focuses her practice on government relations matters involving the Florida Legislature, the Governor and Cabinet and state agencies. Prior to joining GrayRobinson, Katie served as a political consultant to many key members in leadership in the Florida House of Representatives.

Areas of Practice
- Government Affairs & Lobbying

Education
- University of Central Florida, B.S., Interpersonal and Organizational Communications
- University of Central Florida, M.B.A.

Civic
- Leadership Orlando, Class 96
- Connect Florida Leadership Institute, Class VIII
- Florida Symphony Youth Orchestra, Board Member
- Seminole County Chamber of Commerce

Presentations & Seminars
- Panelist, "2019 Florida Legislative Review," Orlando Session Wrap Up, May 15, 2019
- Moderator, "Preparing for Autonomous Vehicles - Be in the Know!" GrayRobinson Community Leader Forum, September 18, 2018
- Panelist, "2018 Florida Legislative Review," Orlando Session Wrap Up, March 29, 2018

* Denotes non-attorney professional
Experience

Kim is a senior government affairs consultant in GrayRobinson’s Tallahassee office. She lobbies across a wide range of policy areas on behalf of public and private clients. Kim brings almost three decades of education policy knowledge and experience to the firm’s lobbying practice, having served in multiple leadership roles at the Department of Education, including as Governmental Relations Director and Senior Policy Advisor for five consecutive Commissioners of Education.

Kim began her public service career with the State of Florida in 1989 as a program auditor with the Office of the Auditor General, and later worked for the Office of Program Policy Analysis and Government Accountability. During her 10-year career with the Florida Legislature, she worked on a wide array of policy areas, but the majority of her work focused on K-20 education policy. Kim then served as a senior advisor and in key leadership positions for five consecutive Commissioners of Education. She was sought out to work for Governor Bush in several key roles within the Executive Office of the Governor, including as policy coordinator for education in the Office of Planning and Budget.

Most recently, Kim served as Chief of Staff to Florida Governor Rick Scott. In this role, she was responsible for directly serving and advising the Governor on issues pertaining to 100,000 plus executive branch employees, and she administered an $83 billion state budget. Kim also served as Governor Scott’s Deputy Chief of Staff, Legislative Affairs Director, Education Policy Coordinator and as Policy Advisor during his successful re-election campaign.

Areas of Practice

- Government Affairs & Lobbying
- Education

Education

- Tulane University, B.S.
- Florida State University, M.S.
- Florida State University, Ph.D.

* Denotes non-attorney professional
Professional Associations & Memberships

- Florida Association of Intergovernmental Relations (FAIR), January 2019
- Association of Florida Colleges (AFC), January 2019-present
- Governor-Elect Ron DeSantis’ Transition Advisory Committee
  - Education and Workforce Development, December 2018-January 2019
- Florida Sports Foundation, December 2018-present
- Florida Association of Professional Lobbyists
  - Designated Professional Lobbyist
- Florida Education Legislative Liaisons

Presentations & Seminars

- Speaker, “Getting the Most from Your City’s Contract Lobbyist,” FLCities 93rd Annual Conference, August 15-17, 2019
- Panelist, “2019 Florida Legislative Review,” Jacksonville Session Wrap Up, May 13, 2019
- “Questions for the Governor’s Office,” Florida State University class Florida Legislative Practice: From Bill Drafting to the Governor’s Desk, April 10, 2019
- “Advocacy 101,” Florida Nurses’ Association Advocacy Days, March 13, 2019
- “Current Education and Political Issues,” Florida School Board Association Meeting, November 28, 2018
- State and Federal Appropriations Presentation “Bringing Home the Bacon,” Florida League of Cities, 11-15-18
- “Executive Branch Insight—Pulling Back the Curtain,” Florida Agency of Professional Lobbyist (FAPL) Retreat, September 5-7, 2018
- “Building the Foundation for Successful Legislative Advocacy,” Florida School Board Association Summer Conference, 2018
- “2018 Florida Legislative Review,” Miami Session Wrap Up, April 10, 2018
- “In Focus: Session 2018,” Pensacola Chamber Gopher Club Breakfast, April 6, 2018
- “Constitution Revision Commission,” The Florida Bar’s Education Law Committee Meeting, January 19, 2018
- “Constitution Revision Commission,” Florida School Board Association Conference, November 29, 2017

Civic

- Florida Sports Foundation
  - Board of Directors, December 2018
- Orlando Economic Development Council
  - Political Leadership Institute Class, November 2018

E-lerts & Newsletters

- GrayRobinson Government Relations & Lobbying E-lert: First Steps Taken in the DeSantis Education Plan (02/07/19)
Kirk Pepper*
Senior Government Affairs Consultant
kirk.pepper@gray-robinson.com

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Fax: 850-577-3311

Experience
Kirk’s political career covers a spectrum that is unmatched by most professionals. Over the last decade-plus, he has worked to elect candidates and support elected officials in seven states throughout the Southeast, spending the last eleven years in Florida.

Kirk has worked to elect officials ranging from City Council and Mayor to U.S. Congress and President of the United States. He has worked to re-elect the President in roles both inside the national campaign headquarters and, ultimately, heading the Republican National Committee’s efforts on behalf of the President in the State of Missouri. In 2004, Kirk was instrumental in the President carrying the State of Missouri, along with re-electing a U.S. Senator and electing a new Governor.

Since 2005, Kirk has played senior roles, serving as a manager, a confidant, a policy advisor and a strategist in Florida politics, electing Governors, members of the Cabinet and Legislative leaders along the way. He has worked at the highest levels within the state political party structure in Florida, on statewide campaigns, as a consultant and inside the Capitol. This has given him a unique insight into the inner workings of the halls of power in Florida, along with unparalleled relationships with decision makers throughout state government.

Areas of Practice
- Government Affairs & Lobbying

Education
- University of Southern Mississippi, B.S. [2001]

* Denotes non-attorney professional
Robert F. Stuart Jr.*
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Fax: 850-577-3311

Experience

Robert began his career as a legislative aide to the Florida House of Representatives for a district that represents much of Orlando and Orange County. This “inside” experience in the halls of our state Capitol gives him a deep understanding of and a unique perspective on the inner workings of the legislative process and the strategies necessary to be successful in Tallahassee.

Now twelve years in private practice with GrayRobinson, Robert is a senior government affairs consultant and has a leadership role in the strategic direction of the practice, the recruitment of new business, servicing existing firm clients, and building/maintaining strong personal and working relationships with elected officials throughout Florida. While the bulk of his practice is Tallahassee-centric (lobbying the Florida Legislature, Executive Office of the Governor, the Florida Cabinet, and the various state agencies), he also represents clients at the local level throughout the state on matters of procurement and policy. He has significant lobbying experience in the areas of Economic Development, Education, Finance and Tax, Transportation, Insurance, Alcohol, and Local Government Issues.

Robert and his partners in the government affairs practice leverage the firm’s statewide presence to ensure that elected leaders throughout the state trust the GrayRobinson Team and their involvement in the communities that the firm calls home. These relationships serve to both grow the practice and better advocate for their clients.

Robert’s lobbying experience includes representing clients of all shapes, sizes and interests. From public sector clients, such as cities, law enforcement offices and clerks of courts, to Fortune 500 companies, Robert interacts with every committee and every legislator in Tallahassee regardless of party affiliation.

* Denotes non-attorney professional
Areas of Practice

- Government Affairs & Lobbying
- Government
- Higher Education
- Restaurant
- Environmental & Sustainability Law
- Alcohol Beverage
- Hospitality

Background

Robert is a senior government affairs consultant based in our Orlando office. Born and raised in the Orlando area, he is a graduate of Edgewater High School and the University of Florida with a degree in political science. During his time at the University of Florida, he was president of his fraternity, was active in student government, and held leadership positions in a number of student-led community service initiatives, raising money for organizations such as the Children’s Miracle Network.

Robert’s familiarity in local and state level policymaking stems from his personal experience and from being part of a family steeped in public service. His family includes a former state senator and city commissioner, a 30-year president of the local chamber of commerce, a current elected member of the Orlando City Council and a recent congressional candidate. This gives Robert firsthand knowledge of the work and dedication required to create and implement good public policy.

Education

- University of Florida, B.A. (political science, 2005)
  - Sigma Chi Fraternity, President

Professional Associations & Memberships

- Florida Association of Professional Lobbyists, Member
  - Designated Professional Lobbyist

Awards & Recognition

- I-4 Business Magazine, Executive Profile, October 2015
- Orlando Business Journal, 40 Under 40, 2010
- Orlando Business Journal, Most Influential Businessmen Nominee, 2010
- Orlando Business Journal, 10 Businessmen to Watch, 2010

Civic

- GrayRobinson Political Action Committee, Chair
- Orlando Economic Partnership, Legislative Affairs Committee, Chair
Princeton Elementary PTA, First Vice President, 2015

Tiger Bay Club of Orlando
  - President
  - Board Member
  - Treasurer, 2015

Florida Citrus Sports, Executive Board Member, 2014-present

Leadership West Orange Graduate, Class of 2009

Leadership Orlando Graduate, Class 67

Central Florida Partnership, Young Professionals Advisory Board, Co-Founder

**Presentations & Seminars**

- Presenter, Pensacola Chamber of Commerce’s Gopher Club Meeting, June 2, 2019
- Panelist, “2019 Florida Legislative Review,” Orlando Session Wrap Up, May 15, 2019
- Panelist, “2019 Florida Legislative Review,” Jacksonville Session Wrap Up, May 13, 2019
- Panelist, “2018 Florida Legislative Review,” Jacksonville Session Wrap Up, April 18, 2018
- Panelist, “2018 Florida Legislative Review,” Orlando Session Wrap Up, March 29, 2018
- Presenter, The Florida Bar Environmental & Land Use Law Section Webcast Series, February 23, 2017
- Panelist, “2017 Florida Legislative Review,” Jacksonville Session Wrap Up, June 8, 2017
- Panelist, “2016 Florida Legislative Review,” Fort Lauderdale Session Wrap Up, April 14, 2016
Experience

Jason concentrates his practice in the areas of governmental affairs and administrative law matters, and regularly works with the executive branch agencies and the Legislature on behalf of his clients. Jason has successfully defended cities, counties, sheriffs, school boards, and/or their insurers in the claim bill process.


Areas of Practice

- Administrative & Reguatory
- Attorney General Defense
- Election Law
- Insurance Transactional & Regulatory
- Transportation
- Alcohol Beverage
- Health Care
- Government
- Government Affairs & Lobbying
Background

Jason was born in New Jersey and has lived in Florida since 1982. He received his bachelor’s degree from the University of Florida in 1990 and then went on to receive his juris doctor from the University of Florida College of Law in 1993. He moved to Tallahassee from Fort Lauderdale in 1998.

Education

- University of Florida, B.S.B.A. [1990]
- University of Florida, J.D. [1993]

Admissions

- Florida
- U.S. District Court, Southern District of Florida

Professional Associations & Memberships

- Judicial Nominating Commission
    - Chair, 2009-2010
    - Chair, 2016-2019
- National Republican Congressional Committee, Florida Counsel, 2010 and 2016 elections
- Florida House of Representatives, Redistricting Counsel, 2002 and 2012 cycles
- Rudy Giuliani Presidential Campaign, Florida Counsel, 2007-2008
- Republican Party of Florida, Election Law Counsel, 2002
- Litigation Counsel to George W. Bush and Richard Cheney, 2000 Presidential Election Contest
- Speaker, Florida House of Representatives, Special Counsel, 2000
- The Florida Bar
  - Governmental and Public Policy Advocacy Committee

Media Mentions

- “Judicial Nominating Commission Chair Resigns, Claims Governor’s Office Interfered with Independence,” Florida Today, June 2019
- “More than 90 people are traveling to Israel with Gov. Ron DeSantis. Who’s on the list?” SunSentinel, May 2019
- “UNF Delegation Joining Gov. DeSantis On Trip To Israel,” WJCT Public Media, May 2019
- “See the Names of the Delegation Members Accompanying Gov. DeSantis to Israel,” Tallahassee Democrat, May 2019


“New Florida Governor Moves Quickly With Supreme Court Pick, Environmental Plan,” The Wall Street Journal, January 2019

“11 Names Sent To Fla. Gov.-Elect For 3 High Court Seats,” Law360, November 2018

“Fla. High Court Nominee Process Can Continue, Justices Say,” Law360, November 2018

“Trouble Getting Sake in Florida? Law Could Soon Change for the Better,” Tampa Bay Times, June 2017


“Publix, Liquor Stores Unite to Keep Walls Between Groceries, Booze,” Orlando Sentinel, October 2015


“Federal Medical Marijuana Bill Backed by Senate Trio,” Examiner, March 2015


“Florida Legislation and Regulation to Watch in 2015,” Law360, January 2015

“Craft Beer Brewers Go Head to Head With Beer Distributors,” Florida Trend, January 2014


“Smooth Operators,” AmericanLawyer.com, November 2011

Interview on Fox News Channel, October 2010

Interview on Fox News Channel, Election Day, November 2010

Civic


Florida Tax Watch, Board of Trustees, 2004-2006

National Jewish Coalition, South Florida Chairman, 1996-1998

Florida Blue Key

Reported Cases

Significant reported cases include:

In re Senate Joint Resolution of Legislative Apportionment 1176, 83 So.3d 597 (Fla. 2012)


Florida Senate v. Forman, 826 So.2d 279 (Fla. 2002)

In re: Constitutionality of House Joint Resolution 1987, 817 So.2d 819 (Fla. 2002)

Palm Beach County Canvassing Board v. Harris, 772 So.2d 1273 (Fla. 2000)

D. Questions/Response to Scope of Services

1. Describe the methods by which your firm will fulfill the services requested in the Scope of Services and subsequent sections.

GrayRobinson will employ a Team approach to fulfill the services requested. Because of the dual nature of the representation and services, we are proposing two Team Leaders who can efficiently travel to attend meetings and make any presentations as requested in Indiantown; and, during Legislative Session, represent Indiantown in Tallahassee. They will direct the efforts of the Team and be accountable for all work executed. GrayRobinson believes a team approach allows us to accomplish three critical objectives in representing the Village: (1) to provide quality lobbying services; (2) to maintain the flexibility necessary to respond to issues and opportunities swiftly and thoroughly; and, (3) to facilitate communication and accountability.

To ensure these objectives are met, before any new work is undertaken, workloads and schedules of all lobbyists and staff on our Team are reviewed. GrayRobinson believes in the quality of the work we produce, not the quantity. We are committed to the quality representation of each of our clients and can assure the Village of our availability as well as our accessibility to address its needs. In addition to the Team’s own experience, Chris and Joseph have the option of calling upon the experience and specialized qualifications of more than 250 GrayRobinson attorneys and professionals throughout the Firm. These attorneys come from various professional backgrounds, including government, law firms and private industry. The following describes the methods by which the GrayRobinson Team will fulfill the services requested in the Scope of Services and subsequent sections.

On a 24-hour basis during the regular Legislative session, any special session, interim committee weeks, and any other times as requested, the Team provides Legislative drafting, strategy development, one-on-one lobbying, committee presentations, and other services. We will effectively utilize our skills, engage Village and other grassroots organizations, and ever-improving technology to assure that we get results, and that we are in constant contact with Village representatives.

Scope of Services

1. Contact and communicate with agencies and officers of state and local government as directed by the Village Manager.

The GrayRobinson Team is well-respected in both the Legislative and Executive Branches, including the state agencies, and at the local government level across the state. The Team has a broad network of personal and professional relationships with policymakers as well as with their staffs, and we maintain ongoing communications. These relationships are built on trust and respect, based on years of honest and forthright interactions. Depending on the issue at hand, our Team would begin its work for the Village by being in contact with the applicable office, department, and agency head or committee chairman wherever an issue will be managed.

Sometimes policy issues can be addressed with one phone call to the correct agency head. We enjoy those kinds of relationships with the secretaries and department heads, as well as with key staff members, and can often resolve issues quickly. As well, if a phone call does not completely address an issue, this step almost always helps to determine meetings or next steps for our Team and/or members of the Village leadership. Many times, a high-level policy issue requires both Legislative and Executive remedies to obtain resolution on the issue as quickly as possible. When these policy issues enter
the realm of the Legislature, our approach is similar to that just described. We unify the local delegation with calls and meetings and gatherings and we work with the presiding officers, committee chairs and specific sponsors. We recognize that in this scope of services, policy issues will originate from and/or be driven by the Village. In those cases, we would work closely with Village leadership to assess and evaluate key political issues and opportunities that enable us to define and establish your primary objectives. We will use a comprehensive strategy and our legislative agenda to achieve those objectives, based on our experience, knowledge and findings with regard to any specific matter. In other cases, if the Village is playing defense, we will work with the Village to establish and understand the policy concern, and then work with the stakeholders (for and against) to merit out a resolution. In some instances, compromise can be achieved. In other instances, compromise is not an available option and our Team must seek defeat of a measure. In those instances, we leave no stone unturned, no call left unplaced and no meeting not taken to advocate fiercely for the client’s position in defeating legislation that would have a negative impact.

To help ensure a successful relationship, we propose an approach that includes frequent and on-going communication with the Village leadership, to ensure we continue to appreciate the immediate and long-term goals and any changes in priorities that are vital to the advancement of your strategic plan. We are available 24/7 to receive requests, answer your questions and formulate responses to new developments. Our communications with key legislative and agency contacts work much the same -- they know how to reach us 24/7, and when we need to talk to the right person in a specific agency or on a particular legislative committee, we know how to reach them, day or night.

2. Establish and maintain liaisons with state and local agencies, officers and elected officials.

Maintaining relationships with state and local agencies, officers, elected officials, staff members, and other key contacts is the lifeblood of any lobbying team. This is who we are and what we do. We have decades of experience successfully representing our clients before the regulatory agencies of Florida, as well as with local government agencies and with elected officials because of our deep and long-term relationships. Many members of our Team themselves have served as elected officials or on their staffs, and have worked for state agencies and in local government. We take pride in not just knowing who to call to get something done, but in having their cell numbers, in knowing their families and in many cases their personal stories. We list our cell phones on our business cards so that clients, elected officials, and agency or committee staff have access to us at all times. Often during the Legislative process, after-hours calls are necessary. Whether it is the Secretary, Chief of Staff, General Counsel, Deputy Director, County Clerk, Village Manager, and so on, our Team works to establish and maintain relationships and connections and never hesitates to make direct contact on behalf of a client. These relationships will be extremely beneficial when we monitor activities on behalf of the Village, assess and support opportunities for funding, and attend state and local agency meetings as requested.

3. Obtain and provide information and data relating to matters concerning the interests of the Village.

GrayRobinson will obtain information and data relating to matters concerning the interests of the Village as an important part of its preparation in creating the strongest positions possible when presenting the interests of the Village to elected officials, regulatory authorities and key staff members. This is essential to building credible support for initiatives on behalf of the Village. Information, doing research and data mining comes with the territory. This information also can be used to support local initiatives as well as inform communications by Village leadership. We commit to providing this and all data in a timely manner, as well as communicating information regarding the background and outlook for various Legislative
priorities. The moment we are aware of legislation -- both positive and negative -- which impacts our clients, we alert them. This is especially important when it comes to funding issues.

The GrayRobinson Team is sensitive to the Village’s nascent growth and development initiatives, and is prepared to use data and information we can locate to help heighten awareness around these needs to garner support, and help establish and build upon the Village’s annual legislative priorities. It is our practice to continue to add to our knowledge base about every client, and we would continue to research and obtain information at all times throughout our representation, and advise the Village of any useful statistics and data that may materially impact Village initiatives.

4. **Monitor State of Florida and Martin County legislation and rule-making processes by State of Florida agencies (whether pending, introduced or initiated during the term of this contract) which impact the operation, revenues, and/or required expenditures of the Village as discovered or as directed by the Village Manager.**

As previously mentioned, the GrayRobinson Team constantly monitors all current legislative bill filings, as well as new appropriations requests, rules and amendment filings. We subscribe to LobbyTools and use this as our primary bill tracking and monitoring system. It enables us to research bills, PCBs, statutes, legislators, committees, calendars, Florida and national news, press releases and other essential information. We will modify the system to generate customized reports specific to the Village to ensure you receive the most up-to-date information available related to those developments which might impact the operation, revenues, and/or required expenditures of the Village as discovered or as directed by the Village Manager. Additionally, we enjoy great relationships with the staff and secretaries of the various state agencies and will use these relationships to monitor their activities.

Our Team will also monitor legislation and regulations throughout our representation and we would advise the Village of any legislation, regulations or funding opportunities that may materially impact projects and activities immediately. This consistent monitoring will afford us the opportunity to alert the Village immediately of any activity that will adversely impact the Village. Alternately, we will keep the Village apprised of all activity that positively affects its funding posture as well.

We will forward pertinent information on anything that is pending, introduced or initiated during the term of this contract which may impact the operation, revenues, and/or required expenditures of the Village as discovered or as directed by the Village Manager on a weekly basis and more frequently as needed.

5. **Act as an agent of the Village with members of the state delegation, governmental agencies, and persons involved in governmental affairs affecting the Village when and as designated and authorized by the Village Manager.**

Throughout the course of representation, we regularly appear both one-on-one, as well as in front of all state Legislative and Executive Committees, subcommittees, hearing officers, etc., testifying on behalf of our clients. We have provided testimony or information to policy and appropriations subcommittees and major committees, local and regional Legislative delegation meetings, at meetings of the Governor and Cabinet, and at multiple hearings in meetings with Executive branch agencies. We will report to the Village on all matters assigned and participate in meetings and conference calls as directed.

6. **Arrange meetings with legislators for Mayor, Village Council and staff when necessary, and be prepared to participate as required.**

We commit to arranging meetings with legislators for the Mayor, Village Council, and staff when necessary, and will be prepared to participate as required. As well, because of the GrayRobinson Team members that have collectively served and
advocated under five Florida Governors, we maintain excellent working relationships with all of the agency heads, and have exceptionally strong relationships with the Cabinet. We would suggest we also work with the Village Manager to identify appropriate opportunities for meetings with the Executive branch, and state agencies. As well, we will work with the Village Manager to identify opportunities for Village leaders to speak on key issues so that the Village Manager, Mayor and others are seen as thought-leaders on issues that directly impact local government. In politics, presence is power. We want to highlight your presence when you are in Tallahassee and elsewhere, and have you speak on issues of importance to help your messages be heard.

7. Lobby on behalf of Village-sponsored legislation and on specific bills and issues under the general guidance of the Village Manager.

The GrayRobinson Team has a broad network of personal and professional relationships with policymakers as well as with their staff members. With regard to policy matters, depending on the issue at hand, our Team first and foremost, will be in contact with the appropriate agency head or committee chair. Sometimes policy issues can be solved with one phone call to the correct agency head. We enjoy those relationships with the secretaries and department heads, as well as their key staff members, and can often solve issues quickly. As well, if the phone call does not address the issue, this step almost always helps to determine meetings that should be attended by our Team and/or members of Village leadership. Many times, a policy issue requires both Legislative and Executive remedies to obtain resolution on the issue as quickly as possible.

When these policy issues enter the realm of the Legislature, our approach is similar to that described above. We unify the local delegation and we work with the presiding officers, committee chairs and specific sponsors. We recognize that in this scope of services, at times policy issues will originate from and/or be driven by the Village. In those cases, we would work closely with Village personnel to assess and evaluate key political issues and opportunities that enable us to define and establish your primary objectives. We will develop a comprehensive strategy and state legislative agenda to achieve those objectives, based on our experience, knowledge and findings with regard to any specific matter.

The GrayRobinson Team is dedicated to its clients and provides top notch client service. The Team has the knowledge and long-term experience essential to preparing legislation, both general bills and amendments, identifying funding sources, and successfully shepherding specific appropriations through the House, Senate and Governor’s office. As importantly, we are skilled in defeating unfriendly legislation and attempts to reduce or eliminate appropriations line items and proviso language, and any other actions which are detrimental to our clients.

When the Village is playing defense, we will work with the Village to establish and understand the policy concern, and then work with the stakeholders (for and against) to merit out a resolution. In some instances, compromise can be achieved. In other instances, compromise is not an available option and our Team must seek defeat of a measure. In those instances, we leave no stone unturned, no call left unplaced and no meeting not taken to advocate fiercely for the client’s position in defeating legislation that will have a negative impact.
8. Submit written monthly reports to the Village Manager, which reflect progress or status of issues of concern to the Village.

GrayRobinson will provide regular monthly written progress reports to the Village Manager, which reflect progress or status on issues of concern to the Village. We will provide them at the end of each month during conference and legislative sessions. We are prepared to provide them more frequently as requested and will tailor them specifically to the needs and requests of the Village. As the Village Manager provides changes in priorities and new information, we will adjust our plan for advancing the Village’s goals and adjust the information in the customized reports.

9. Appear before the Village Council and Mayor to report on legislative activity at least once a quarter, during a regularly-scheduled meeting or appropriate work session.

GrayRobinson representatives will appear before the Village Council and Mayor to report on legislative activity at least once a quarter during a regularly scheduled meeting or an appropriate work session. The Team will be in contact with the Village Manager more often, as appropriate and as requested. We will provide regular weekly written briefing reports at the end of each week during conference and legislative sessions. We are prepared to provide them more frequently as requested and will tailor them specifically to the needs and requests of the Village. As mentioned previously, the GrayRobinson Team constantly monitors all legislative bill filings, appropriations requests and amendment filings, and will include this information in the reports as well.

Additionally, the GrayRobinson Team will work diligently to provide the Village with an update on its legislative priorities immediately following Session. The Team also will provide a detailed written report following Session which will review additional legislation and any new requirements affecting the Village. Status on the reports will be communicated regularly so the Village Manager knows when to expect delivery.

Our lobbying Team works year-round, and will continue to forge and maintain appropriate relationships, drive the Village’s agenda forward and keep the Village Manager up to date on movements in non-session months affecting developing legislation or polices that may affect the Village.

We will provide written reports during these months outside of Session about areas of interest or potential concern to the Village that we learn about through our relationships or interim committee meetings, rulemaking hearings, status of studies underway or advance notices being released of legislation being proposed. We are committed to continuing the highest quality of work and service for the Village throughout the entire calendar year.

10. Provide specific recommendations on legislative and administrative action.

GrayRobinson will build upon the Village’s annual legislative priorities, monitor legislation and regulations and provide specific recommendations on legislative and administrative action.

We will pursue solutions for Village projects in both the legislative appropriations process and through the Executive Branch via grants from state agencies, foundations, water management districts, etc. The GrayRobinson Team will pursue these funding opportunities based on the Village’s priorities. As discussed in detail herein, our Firm employs a multi-track approach to appropriations issues, leveraging relationships with executive branch agencies as well as with the Legislature. We will use this approach for each priority identified by the Village in order to maximize results. Further, on behalf of the Village, we will work to increase and maximize funding opportunities designated for rural areas for the purposes of economic
development and diversification, infrastructure and workforce development. We understand the critical importance of state investment in Florida’s rural communities and have experience doing this on behalf of rural areas and similarly situated communities.

We believe the appropriations process (and all lobbying efforts, for that matter) is a year-round effort and not confined only to the 60-day legislative session.

2. **Provide a statement of the service(s) that differentiate your firm from other respondents**

When it comes to lobbying, it’s not the services that differentiate between lobbying firms; it’s really: 1.) the quality of relationships with key contacts; 2.) the depth of knowledge and preparation on client issues, and, 3.) the frequency and clarity of ongoing substantive communications with clients. GrayRobinson excels in these areas.

1.) Members of GrayRobinson’s Government Relations and Lobbying Practice bring to bear for our clients key relationships they have nurtured throughout their careers, including those developed while serving in senior roles in both Florida and federal government offices. The best and most enduring relationships are born out of honest and truthful negotiations and interpersonal dealings. Our Team has significant relationships with the leadership in the Florida House and Senate.

**House Speaker Jose Oliva** is a great friend of GrayRobinson, having served in the House with GrayRobinson President Dean Cannon, who also was a House Speaker, and Speaker Oliva also has relationships with everyone on our Team. Each member of our Team also has productive relationships with the Speaker’s lieutenants. **Senate President Bill Galvano** has worked with our Team since his days in the Florida House, where he also served with Dean Cannon. We know his priorities (transit and education), his leadership style, and we know how to work with him to get things done for our clients. We were early supporters of future House Speakers **Chris Sprowls, Paul Renner,** and **Daniel Perez,** and our Team works has worked closely with 2020-2022 **Senate President-designate Wilton Simpson** since his days at the Tampa Chamber. We work very closely with **Senator Kathleen Passidomo,** Majority Leader, member of the Appropriations Committee, and future Senate President. GrayRobinson has substantial and productive contacts built on years of trust and hard work together in the Executive branch, including **Secretary of the Florida Department of Transportation Kevin Thibault.** He is a very good friend of ours with whom we have worked successfully for clients on numerous issues. He is an important ally, and we have the ability to reach out to him and to members of his staff for information and intelligence as well as support. **Florida Division of Emergency Management Director Jared Moskowitz,** his **Chief of Staff Jonathan Bussey** and Legislative Affairs Director Jared Rosenstein, **Department of Environmental Protection Secretary Noah Valenstein,** and **Department of Economic Opportunity Executive Director Ken Lawson** also are very good friends of GrayRobinson Team members.

2.) We inform our representation based on the direction and input we receive from clients at a Legislative Workshop we hold at the beginning of every client relationship. In this on-site meeting, our Team listens so we understand a client’s needs, issues, and objectives. Clients find this helpful in clarifying their needs as well. We also have found that a timeline of benchmarks based on agreed-upon strategic priorities helps clients and our Team be better positioned for Legislative success. We will create a timeline specific to the Village’s goals following an on-site legislative workshop with the combined teams from GrayRobinson and the Village which will include steps and recommendations for moving forward.
Throughout our representation, we: conduct research and data mining; survey groups and associations for opportunities; talk and talk and talk with contacts and experts; develop important allies; educate staff members and prepare lawmakers with information as background for future discussions; talk with the Village on a regular and frequent basis to stay up-to-date on events and priorities; monitor all Legislative bill filings, appropriations requests, and amendment filings. We subscribe to LobbyTools and use this as our primary bill tracking system. LobbyTools enables us to research bills, PCBs, statutes, legislators, committees, calendars, Florida and national news, press releases, and other essential information pertaining to the Village.

3.) We modify our bill tracking system to create customized reports specific to clients in order to provide the most targeted, up-to-date information available. We also actively monitor developments and communicate this information in real time, consulting with the Village and advising on options and opportunities during Session when they arise. We will attend meetings in Indiantown in person as requested and utilize technology when appropriate to communicate and keep the Village informed of opportunities and options, and provide information, advice and consulting on matters when requested.

We effectively utilize our relationships, knowledge of issues and client needs, and commitment to communications to assure that we get results, and that we are in constant contact with Village representatives. The GrayRobinson Team will engage some of its client relationships such Florida Association of Counties, and its relationships around the state with team members holding positions in a variety of state and national professional organizations which can benefit the Village and its interests in economic stimulation, business development, travel and tourism, neighborhood and housing revitalization, and other key areas.

Some of these groups include:

- IDignity
- Frederick Leadership Initiative
- Junior Achievement Professional Connection
- Tiger Bay
- Business Force
- University of Florida Law Alumni Council
- Cuban American Bar Association
- Central Florida Boy Scout Council
- Florida Chamber of Commerce
- Connect Florida
- Greater Pensacola Chamber of Commerce
- Children’s Movement of Florida
- Leadership Florida
- Florida Symphony Youth Orchestra
- Leadership Tallahassee
- Hispanic National Bar Association
- Hispanic Unity of Florida
- Hispanic Institute at Hodges University
- Floridians for Better Transportation
- Judicial Nominating Commission
- Justice Teaching Volunteer
- Florida Sports Foundation
- James Madison Institute
- Enterprise Florida
- Florida Tax Watch
E. Fees

1. Provide your fees for the proposed services. Fee quotes should be detailed by service.

GrayRobinson proposes a lump sum price of $48,000 annually for performing all of the work described in the Request for Proposal. This includes unlimited hours by the Team members identified herein, as well as other members of the Government Relations and Lobbying Team who may be called upon for specific expertise to support Village goals. We do not propose any additional fees.

2. Outline billing and payment expectations, including timing and method of payment.

GrayRobinson bills its clients periodically, usually monthly. Method of payment and terms will be agreed upon before the commencement of representation.

3. Describe any remaining fees not previously detailed in the above, i.e. for ad-hoc services.

We do not anticipate any additional fees or costs.
F. References

List the name, address and telephone number of references from at least three recent similar projects. Include a brief description of the work provided for each reference. Florida municipal or county projects are preferred. You may offer more than three recent similar projects if desired. The references should include the start date of the project and the date of completion for each project.

CLIENT: CITY OF GREENACRES
5800 Melaleuca Lane, Greenacres FL 33463
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2018 - ongoing
Client contact person and phone number: Andrea McCue, City Manager, 561-642-2017.

CLIENT: CITY OF GROVELAND
156 S. Lake Avenue, Groveland, FL 34736
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2018 - ongoing
Client contact person and phone number: Michael Hein, 352-429-2141, ext. 250.

CLIENT: CITY OF KISSIMMEE
2213 Mabbette St., Kissimmee, FL 34741
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2016 - ongoing
Client contact person and phone number: Mike Steigerwald, City Manager, 407-847-2821.

CLIENT: CITY OF PORT ST. LUCIE
121 SW Port St Lucie Blvd., Port St. Lucie, FL 34984
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2016 - ongoing
Client contact person and phone number: Ella Gilbert, City Attorney’s Office, 772-871-5294.

CLIENT: CITY OF ST. CLOUD
1300 9th Street, Saint Cloud, FL 34769
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2016 - ongoing

CLIENT: CITY OF WEST PALM BEACH
401 Clematis St., West Palm Beach, FL 33401
Description of work: Full service legislative and executive branch advocacy and lobbying, for policy and appropriations.
Dates covering the term of the contract: 2014 - ongoing
Client contact person and phone number: Kimberly Rothenburg, City Attorney, 561-822-1360.
G. Implementation Schedule

Include a detailed implementation schedule with an estimated start date of March 1, 2020 and note key milestones and timelines for deliverables. Identify any assumptions used in developing the schedule.

ADVOCATING FOR IMMEDIATE LEGISLATIVE PRIORITIES

As soon as we begin representation, would convene a conference call between the Village Manager and key Village representatives to quickly get up to speed on the details behind the Village’s current appropriation request for $3.5 million for its Road/Storm Water Drainage Reconstruction Project, and secure agreement on a strategy to move forward. It is imperative that the Team jump in immediately to get behind this, as the last day of Session currently is scheduled for March 13th. This remaining time on the Session calendar will include the all-important budget conference, an arena where the GrayRobinson Team excels and where we can make a significant difference in the potential outcome for this 2020 Legislative Priority of the Village Council. Once Session ends, the GrayRobinson Team will create its first end-of-Session report for the Village, and we will implement the following:

DEVELOPING AN ANNUAL STATE LEGISLATIVE AGENDA

GrayRobinson will meet in person with the Village and conduct a Legislative workshop to develop a Legislative and funding agenda for the next several months. While the Village has previous Legislative agendas, we would aim to enhance any existing plans utilizing our insight into the leaders and issues surrounding the 2020 – 2021 Legislative Session. For the Village, and for us, the agenda needs to provide clear articulation of goals and expectations which, when combined with the Village’s scope of services, will serve as a roadmap for our representation. Lobbying is a year-round commitment and we don’t stop working to get results just because the legislature is not in session.

IDENTIFYING ISSUES OF POTENTIAL INTEREST

Once the Legislative priorities for the year are outlined, GrayRobinson will diligently monitor and work to identify activities and issues of potential interest to the Village. We will begin by working with key legislators and with our Village point of contact(s) to identify other legislators who may be advocates for your goals, as well as those who may oppose your Legislative priorities. We will also work closely with the leadership of the Minority Party in the House and Senate, and members of your local delegation, whom we know well.

TRACKING AND ANALYZING STATE LEGISLATION

Throughout our representation, we will constantly monitor all Legislative bill filings, appropriations requests, and amendment filings. As mentioned previously, we subscribe to LobbyTools and use this as our primary bill tracking and monitoring system. LobbyTools enables us to research bills, PCBs, statutes, legislators, committees, calendars, Florida and national news, press releases, and other essential information pertaining to the Village. We will modify the system to generate customized reports specific to the Village in order to provide the most targeted, up-to-date information available. Additionally, we enjoy strong relationships with staff and various members of Florida’s state agencies and we will utilize these relationships to assist in monitoring all activity relevant to the Village. This also gives us an opportunity to develop other avenues for relationship development and funding sources outside the legislative session.

MAKING KEY MEETINGS COUNT

We will work with the Village Manager and others as appropriate to identify key issue areas [e.g., education, economic revitalization, housing development, tourism, retail and real estate development, parks and recreation], projects [e.g., public
transportation schedules, water and sewage systems, and neighborhood beautification) and other areas of interest. Using these we will match and schedule key meetings with elected officials such as key Committee chairs and your state delegation; with relevant organization leaders (e.g., Ginger Delegal, executive director of the Florida Association of Counties; Isaac Salver, president of the Florida League of Cities (and we also can include the National League of Cities), Mark Wilson, president of the Florida Chamber of Commerce; Jamal Sowell, president and CEO of Enterprise Florida, as well as various Board members, including GrayRobinson’s President Dean Cannon), and, heads of Executive Office agencies. These could include our very good friend Ken Lawson, executive director at the Department of Economic Opportunity; Jared Moskowitz, director of the Division of Emergency Management, with whom we have a very close working relationship; Noah Valentine, Secretary of the Department of Environmental Protection; and, Commissioner Richard Corcoran at the Department of Education – the Village needs to meet with the right agencies where it strategically makes sense to highlight its plans and progress to date, as well as its needs for the future. GrayRobinson has many close friends and great working relationships in places that count for the Village.

For any meetings, the Team will prepare talking points, briefing materials, backgrounders, attend with you as needed/appropriate, and recommend next steps and follow-up actions.

SESSION SUPPORT SERVICES AND FOLLOW-UP

During the Legislative session, the GrayRobinson Team will provide Legislative drafting, strategy development, one-on-one lobbying, committee presentations, and other services. We will effectively utilize our skills and ever-improving technology to assure that we get results, and that we are in constant contact with Village representatives. In addition to using state-of-the-art technology in our advocacy, we maintain excellent relationships with key legislators and staff that will advocate on behalf of the Village on appropriation and policy issues. After session, we will ensure that there is appropriate follow-through on any bills impacting the Village.

APPROPRIATIONS

Our strategy when representing the Village on appropriations matters begins with advocating for your funding priorities to be included within the Executive branch agencies’ budget requests as well as the Governor’s proposed budget (submitted to the Legislature prior to each session). This is work that is ongoing. From there, our focus shifts to the leadership of both the House and Senate, beginning with the Speaker and the President. We spend considerable time and effort educating the respective budget chairs of each chamber (along with their staff members), to ensure they know and fully understand the importance of the Village’s appropriations requests. Lastly, we educate the chairs and members of the appropriations subcommittees that have jurisdiction over the Village’s specific budget requests. All of these steps are important to achieving success in the appropriations process, and GrayRobinson takes great pride in our depth of relationships in both the Executive and Legislative branch of Florida’s state government that will benefit the Village and your priorities.

TIMELINE

We have found that a post-engagement timeline of benchmarks helps new clients and our Team position ourselves for Legislative success. Below are recommendations for such onboarding of our Team to represent the Village in Tallahassee.

- After the hectic last days of Session in March 2020, GrayRobinson begins the process of fostering real and in-depth understanding of the Village’s needs and issues, as well as developing with you the strategy, tactics, and messaging of same, with initial meetings with the Village leadership and designated staff taking place during this post-Session period.
Following these meetings, we will submit a written Legislative strategy, including the refinement of proposed statutory or appropriations-based changes.

This strategy would include supporting the plan and execution of one or two successful “Day[s] at the Capitol” for the Village to both raise its profile with members of executive agency departments and other organizations that are based in Tallahassee, and to meet with members of the Florida Legislature and garner support for its issues. A “Day at the Capitol” can be scheduled during the fall, in September or October to meet with Executive agency officials, key organization leaders, and allies, and/or during Committee Weeks in January and February 2021, delayed because this is an election year.

Work continues throughout this spring and summer executing meetings, conducting legislative and executive branch briefings, researching grants and supporting grant applications, developing partners, introducing the Village to contacts in government and NGO funding organizations and taking other important actions as noted.

With our Legislative strategy in place, we will continue to identify champions and supporters of each goal during this time, as well as note avenues to enact change. In some cases, this may be through the filing of individual policy bills by House and Senate Members and moving them through the committee process. We will having this strategy in place and begin to take action in the months of January and February 2021, during Committee Weeks.

When the Legislative session resumes (likely in March 2021), we focus again on effecting appropriations outcomes favorable to the Village through the budget process and on other legislative initiatives.

When the Legislative session concludes, we will ensure appropriate follow-through on bills impacting the Village and strategies/issues for the 2021-2022 Legislative Session.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Description of Work/Action Items</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Inventory</td>
<td>Comprehensive assessment of Village’s needs and assets, including priority initiatives; political allies; policy goals; legislative and regulatory concerns; state funded initiatives; and recent accomplishments.</td>
<td>First 60 days of engagement</td>
</tr>
<tr>
<td>Strategic guidance and assistance engaging Legislative audiences.</td>
<td>Utilizing the resource inventory, will develop a proposed comprehensive plan for review and approval to engage Legislative audiences.</td>
<td>First 60 days of engagement</td>
</tr>
<tr>
<td>Establish potential champions and supporters for each identified issue and facilitate meetings; ensure appropriate follow-up from meetings.</td>
<td>Create a comprehensive database of representatives who have signed on to key legislative proposals, belong to critical caucuses, and have co-signed letters of support on priority issues for the Village. This database will be used to reach out to potential champions, maintain relationships with existing champions, and identify new opportunities for congressional outreach.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Activity</td>
<td>Work with Caucuses, Committees, senior staff, and personal office contacts.</td>
<td>Timeline</td>
</tr>
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<tr>
<td>Advise and assist in the implementation of activities (such as briefings/hearings, creation of materials) to educate members of Legislature and their staffs about these issues. For events at the Capitol, assist in securing an event cosponsor and room for the event and confirming speakers.</td>
<td>Work with Caucuses, Committees, senior staff, and personal office contacts.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Provide strategic guidance regarding events and other opportunities for raising awareness of and support of the Village’s policy advocacy objectives.</td>
<td>Work with Caucuses, Committees, senior staff, and personal office contacts.</td>
<td>Ongoing</td>
</tr>
<tr>
<td><strong>For each identified issue, assist in developing outreach/lobbying strategies around key legislation including:</strong></td>
<td></td>
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<tr>
<td>For each identified issue, establish potential sponsors, co-sponsors, and supporters for the legislation and facilitate meetings; ensure appropriate follow-up from meetings.</td>
<td>Once assessments are complete, utilize research tools to accomplish this objective.</td>
<td>Ongoing (For legislation: By month before Session)</td>
</tr>
<tr>
<td>Draft, review, revise, and/or provide guidance on new potential legislation as directed.</td>
<td>Providing factsheets, leave behinds, and other materials for staffers is critical in the educational process.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Report on status of relevant legislation as it moves through the legislative process and provide strategic guidance on course of action.</td>
<td>Tracking and assessment are a regular part of the work product provided to our government affairs clients.</td>
<td>Monthly</td>
</tr>
<tr>
<td>Support the Village in organizing and scheduling Capitol days one to two times per year.</td>
<td>Capitol Days, when done well, can be extremely effective. Identifying members of Legislature relevant to the Village and its policy objectives will be critical in being effective during any Capitol Day event. We are engaged in every step of the process from preparing the agenda, to taking to your team about what to expect, to follow-up with offices.</td>
<td>When needed/scheduled</td>
</tr>
<tr>
<td>Create or deepen high level relationships with key offices, particularly caucus or committee leadership. Also will include agency heads, allies when relevant.</td>
<td>Identify, introduce and set up meetings for Village members with relevant Members of Legislature.</td>
<td>When needed/scheduled</td>
</tr>
<tr>
<td>Task</td>
<td>Task Description</td>
<td>Timeline</td>
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<td>----------------------------------------------------------------------</td>
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<tr>
<td>Identify and track relevant policy developments and provide ongoing support for the Village’s advocacy and public policy efforts by providing information proactively and as requested.</td>
<td>Alert the Village to trends, events, and legislative movements, including relevant draft legislation before it is dropped.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>For each identified issue, assist in developing outreach/lobbying strategies around appropriations report language and budget asks including:</td>
<td></td>
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<tr>
<td>Assist in the development of appropriations “asks” and justifications for each of the relevant agencies and budget lines.</td>
<td>Complete assessment and internal review of priorities must be completed.</td>
<td>December 2020-January 2021</td>
</tr>
<tr>
<td>As directed, assist the Village in the submission of appropriations requests, justifications and proposed report language to relevant House and Senate offices.</td>
<td>Compile comprehensive list of member offices to utilize, with appropriate forms for submission, back-up information, and deadlines.</td>
<td>December 2020 - March 2021</td>
</tr>
<tr>
<td>Identify relevant appropriations staff, schedule meetings, and accompany Village staff; ensure appropriate follow-up from meetings.</td>
<td>Once submitted, follow-up with comprehensive list of member offices on requests that were submitted to Subcommittees PRIOR to Member deadlines.</td>
<td>March 2021</td>
</tr>
<tr>
<td>Track the appropriations process, including anticipated timelines and times for input.</td>
<td>Complete review and tracking are critical to success.</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Report on status of appropriations, bills, and report language as it moves through the legislative process and provide strategic guidance on course of action.</td>
<td>Comprehensive tracking and regular conversations with former colleagues uncovers numerous facts and details that will be conveyed back to the Village immediately. Regular reports provided and “Alerts” developed when necessary based on intelligence collected.</td>
<td>March - September 2021</td>
</tr>
<tr>
<td>Additional action items:</td>
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<td></td>
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<tr>
<td>For each identified issue, provide strategic guidance and assistance in engaging and influencing the Administration and Executive branch Agencies.</td>
<td></td>
<td>Ongoing</td>
</tr>
<tr>
<td>Support the Village’s advocacy and public policy efforts by providing relevant analysis.</td>
<td></td>
<td>Ongoing</td>
</tr>
<tr>
<td>Draft letters, testimony, fact sheets, backgrounders, and other materials.</td>
<td></td>
<td>Ongoing</td>
</tr>
<tr>
<td>Participate in internal meetings or meetings with external associations and organizations for coordination purposes.</td>
<td></td>
<td>Ongoing</td>
</tr>
</tbody>
</table>
H. Certificate(s) of Insurance
The Village will require the successful Respondent (or Proposer) to provide Certificates of Insurance evidencing required coverage types and the minimum limits. See the attached Village Draft Standard Agreement for more information on the Village’s insurance requirements.

GrayRobinson maintains required insurance coverage and exceeds the minimum limits. Upon award of work to GrayRobinson, custom certificate holder documents will be provided to the Village.

I. Business Tax Certificate
The proposing organization does not require an Indiantown business tax certificate to respond to this RFP. However, the successful proposer may be required to acquire an Indiantown Business Tax Certificate during the contracting process and maintain an active certificate throughout the contracted period.

If required to do so as the successful proposer, GrayRobinson would acquire an Indiantown Business Tax Certificate during the contracting process, and maintain an active certificate throughout the contracted period.

J. Standard Village Professional Services Agreement
The Village will require the successful company to execute a professional services agreement with the Village. Please review the attached draft agreement and identify any questions, changes, or areas of concern in your proposal to the Village. Any/all requests for changes to the agreement must be included with the responsive proposal. A company’s failure to respond with proposed changes to the draft agreement indicates their concurrence with its terms and conditions.

We have reviewed the draft PSA in the RFP and concur with its terms and conditions.
E. ATTACHMENTS

Certification of Receipt of Addendum

~ CERTIFICATION OF RECEIPT OF ADDENDUM ~
(This signed addendum MUST be included in your/your firm’s proposal.)

I, the undersigned, do hereby certify that I/my firm have/have received copy of RFP-2020-002-HB--Addendum #1, issued on January 21, 2020, by the Village of Indiantown.

[Signature]
Signature of Authorized Representative

[Printed Name]
Printed Name of Authorized Representative

[Individual/Firm Name]

Date

1/21/20
MEMORANDUM

TO: Lake County

FROM: GrayRobinson

DATE: April 29, 2019

SUBJECT: 2019 Legislative Session – Week Eight Summary

With just one week (tentatively) remaining in the 2019 Legislative Session, lawmakers wrapped up the first part of budget negotiations required in order for the House and Senate to agree to a spending plan expected to total somewhere around $90 billion.

Remaining funding issues for different silos of the budget will now be worked out between Orange Park Republican Rep. Travis Cummings and Sen. Rob Bradley, a Fleming Island Republican. Any unresolved issues between those two will get bumped to Senate President Bill Galvano and House Speaker Jose Oliva.

So far, legislative leaders have been optimistic about wrapping up their work before the planned May 3 end to the Legislative Session. The two chambers are aligned on some major spending decisions in silos like health care and public education, although some differences remain on line items.

On environmental spending, for example, the House and Senate are still at odds over how much they want to spend on Florida Forever, the state’s land-purchasing program. Water projects also remain a sticking point.

Money for affordable housing programs administered by the Department of Economic Opportunity was a sticking point that finally settled in the negotiations with the Senate moving towards the direction of the House by focusing most of the affordable housing dollars in the Panhandle to support Hurricane Michael rebuild efforts.

One unique discrepancy in the higher education portion of the budget is how the House and Senate want to use $13 million. The Senate has proposed spending the money on the University
of Florida and Florida State University. The House, meanwhile, wants the money to go toward the state’s regional universities.

Although it’s not a major issue, lawmakers have seemingly agreed to a plan to finance a plane for Gov. Ron DeSantis. DeSantis has traveled the state through unorthodox methods ever since taking office. Now, a $3.8 million line item could help lease or eventually purchase a plane for the executive branch.

Activities on Behalf of Lake County

Appropriation Projects – The House and Senate have released their initial budgets, with both Appropriations committees set to meet this week for amendments. Below is a summary of your priorities.

Budget Conference is in full swing.

CR 466A Phase 3 – Funded in the budget at $450,000. We are actively working on a sprinkle.

State Road 50 Realignment – Currently not funded due to ROW issues, but we are actively working on bringing back this project through the sprinkle list.

Lake County East Lake Sports and Community Complex Central Sewer Connection - Funded in the House at $500,000. At the time of this memo, the “water list” has not yet been published.

CR 437 Realignment from Central Avenue to SR 46 – Funded in the Budget at $750,000. We are actively working on a sprinkle.

Bills of Interest

Septic Tank Treatment and Disposal – SB 214 (Gruters) and HB 85 (Robinson) – These bills direct the Department of Health to identify certain information for onsite sewage treatment and disposal systems, update the current database of such systems, and submit a report to the Governor and Legislature by a specified date; require owners of onsite sewage treatment and disposal systems to have such systems periodically inspected; requires an onsite sewage treatment and disposal system disclosure summary for certain properties before or at the execution of a contract for sale, etc. The effective date is October 1, 2019.

House Committee References: Agriculture & Natural Resources Subcommittee; Health Care Appropriations Subcommittee; and State Affairs Committee
Senate Committee References: Health Policy; Environment and Natural Resources; Appropriations Subcommittee on Health and Human Services; and Appropriations

**UPDATE:** While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Texting While Driving** – House Bill 107 by Toledo and Senate Bill 76 by Simpson are the vehicles for making texting while driving a primary offense. These bills are detailed below.

**Senate Bill 76** by Wilton Simpson was filed on November 20, 2018. The bill makes use of a cellular phone for talking or texting while driving a primary offense. The current exceptions in statute for use of a cellular device for talking or non-texting needs is removed. This bill has an effective date of October 1, 2019.

Committee References: Infrastructure and Security; Innovation, Industry and Technology; Judiciary and Rules

**House Bill 107** by Jackie Toledo was filed on December 17, 2018. The bill prohibits person from operating motor vehicle while using wireless communications device for purpose of text or voice communication; redefines term "wireless communications device" to include voice communications; requires deposit of fines into Emergency Medical Services Trust Fund; removes provision requiring that enforcement be accomplished only as secondary action. The effective date is October 1, 2019.

Committee References: Transportation & Infrastructure Subcommittee; Appropriations Committee; and State Affairs Committee

**UPDATE:** HB 107 passed in both chambers. On Thursday, the House bill was amended by the Senate and it is now in House messages.

**Fertilizer Ordinances - HB 157 (Thompson) and SB 1716 (Bracy)** – The bill (1) requires county & municipal governments to adopt & enforce Model Ordinance for Florida-Friendly Fertilizer Use on Urban Landscapes; (2) specifies that county & municipal governments must require use of specified slow-release fertilizers; (3) provides additional requirements for counties & municipalities within estuary runoff areas; and (4) authorizes county & municipal governments to adopt additional standards if certain criteria are met. The effective date is July 1, 2019.

Committee References: Agriculture & Natural Sciences Resources Subcommittee; Local, Federal & Veterans Affairs Subcommittee; and State Affairs

Committee References: Agriculture; Community Affairs; and Rules
UPDATE: While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Traffic Infraction Detectors - SB 622 (Brandes) and HB 6003 (Sabatini) - The bill repeals provisions relating to installation & use of traffic infraction detectors to enforce specified provisions when a driver fails to stop at traffic signal, provisions that authorize DHSMV, county, or municipality to use such detectors, & provisions for distribution of penalties collected for specified violations. The effective date is July 1, 2022.

Senate Committee References: Infrastructure and Security; Appropriations Subcommittee on Transportation, Tourism and Economic Development; and Appropriations

House Committee References: Transportation & Infrastructure Subcommittee; Appropriations Committee; and State Affairs Committee

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Permit Fees – SB 142 (Perry) and HB 127 (Williamson) – These identical bills would require the governing bodies of counties and municipalities to post their permit and inspection fee schedules and building permit and inspection utilization reports on their websites; require certain governing bodies of local governments to post their building permit and inspection utilization reports on their websites by a specified date.

Notes: This is the same bill filed last year. If not for Parkland and the ensuing legislation that followed, this bill would have passed.

Senate Committee References: Community Affairs; Innovation, Industry, and Technology; and Rules

House Committee References: Local, Federal & Veteran Affairs Subcommittee; Business & Professions Subcommittee; and State Affairs Committee

UPDATE: HB 127 has been passed by both chambers.

Impact Fees – SB 144 (Gruters) and HB 207 (Donalds) – These similar bills would require that the earliest a government can collect impact fees is the issuance of the certificate of occupancy for the property. This bill would exempt water and sewer connection fees from the Florida Impact Fee Act. The effective date is July 1, 2019.

Notes: This bill is nearly identical to the legislation filed by former Senator Dana Young last session. The addition of the water and sewer connection exemption is new. Also like the Permit
Fees legislation, this bill had momentum and likely would have passed if not for Parkland last session.

Senate Committee References: Community Affairs; Finance & Tax; Appropriations
House Committee References: Local, Federal & Veterans Affairs Subcommittee; Commerce Committee; and State Affairs

UPDATE: HB 207 has been passed by both chambers.

Local Government Public Construction Works – HB 167 (Andrade) and SB 806 (Perry) – This bill requires the governing board of local government to consider estimated costs of certain projects using generally accepted cost-accounting principles that account for specified costs when making specified determination; and requires estimated total construction project costs for certain projects to include specified costs. The effective date is July 1, 2019.

House Committee References: Oversight, Transparency & Public Management Subcommittee; Business & Professions Subcommittee; and State Affairs Committee
Senate Committee References: Community Affairs; Governmental Oversight and Accountability; and Rules.

UPDATE: The House bill was received by the Senate. The Senate bill has had no further movement.

Affordable Housing Trust Fund – SB 70 (Mayfield) and HB 1103 (Silvers, Plasencia) – The bill would exempt the State Housing Trust Fund and the Local Government Housing Trust Fund from a provision authorizing the Legislature, in the General Appropriations Act, to transfer unappropriated cash balances from specified trust funds to the Budget Stabilization Fund and the General Revenue Fund, etc. If passed, there would no longer be trust fund “sweeps” of the Sadowski Fund. The effective date July 1, 2019.

Senate Committee References: Community Affairs; Infrastructure & Security; Appropriations Subcommittee on Transportation, Tourism and Economic Development; and Appropriations.

House Committee References: Transportation and Tourism Appropriations Subcommittee; State Affairs Committee; and Appropriations Committee

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.
Vegetable Gardens — SB 82 (Bradley) and HB 145 (Fetterhoff) — These bills would prohibit local governments from regulating vegetable gardens on residential properties except as otherwise provided by law; and specify that such regulations are void and unenforceable, etc. The effective date is July 1, 2019.

Notes: This bill is nearly identical to the bill filed during 2018 session. If not for the Parkland legislation that created delays in the final days of session, it would have likely passed. We are monitoring to ensure that the bill does not expand its reach.

Senate Committee References: Community Affairs and Rules

House Committee References: Local, Federal & Veterans Affairs Subcommittee; Commerce Committee; and State Affairs Committee

UPDATE: The House bill is waiting for a vote on the floor. The Senate bill is in House Messages.

Statewide Procurement Efficiency Task Force – SB 490 (Albritton) would create the task force to evaluate procurement laws and policies and make specified recommendations; specify membership of the task force appointed by Governor, Speaker and Senate President; provide for administrative and technical support of the task force; and require task force members to serve without compensation or reimbursement of expenses, etc. The effective date is July 1, 2019.

Committee References: Governmental Oversight and Accountability; Appropriations Subcommittee on Agriculture, Environment, and General Government; and Appropriations

House Companion: None.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Impact Fees on Affordable Housing — SB 350 (Hutson) and HB 1155 (Plasencia, Silvers) - these similar bills would prohibit local governments from charging impact fees on affordable housing projects. The effective date is July 1, 2019.

Committee References: Community Affairs; Infrastructure and Security; and Appropriations.

House Committee References: Local, Federal and Veterans Affairs Subcommittee; Transportation and Tourism Appropriations Subcommittee; and State Affairs Committee.
UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Public Meetings – HB 265 (Newton) and SB 518 (Rader) would specify that certain boards & commissions are subject to public meetings requirements; revise public meeting notice requirements to three days; provide that member of public has right to speak at public meeting; require members of board or commission to respond to questions made at public meetings within a specified timeframe; repeal provision relating to reasonable opportunity to be heard at public meetings; and provide penalties. The effective date is July 1, 2019.

House Committee References: Oversight, Transparency & Public Management Subcommittee; Public Integrity & Ethics Committee; State Affairs Committee

Senate Committee References: Governmental Oversight and Accountability; Community Affairs; and Rules.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Local Tax Referenda – SB 336 (Brandes) and HB 5 (DiCeglie) - provides that a referendum to adopt or amend a local discretionary sales surtax must be held at a general election, etc. The effective date is upon becoming a law.

House Committee References: Local, Federal and Veterans Affairs Subcommittee; Ways and Means Committee; State Affairs Committee.

Senate Committee References: Ethics and Elections; Finance and Tax; and Rules.

UPDATE: The Senate bill is waiting for a vote on the floor. The House bill was received by the Senate.

Preemption of Local Regulations - HB 3 (Grant, M) and SB 1748 (Perry) – these similar bills would prohibit local governments from imposing or adopting new regulations on businesses & business entities on or after specified date; specifies certain regulations expire & may only be readopted or continue to be imposed after meeting specified criteria; preempts regulation & licensing of professions & occupations to state; prohibits local governments from imposing additional regulations unless specified conditions are met; specifies that local regulations that do not meet specified criteria do not apply; specifies certain specialty contractors are not required to register with Construction Industry Licensing Board; prohibits local governments from requiring certain specialty contractors to obtain license; specifies job scopes for which local jurisdiction may not require license. The effective date is July 1, 2019.
House Committee References: Business & Professions Subcommittee; State Affairs Committee; and Commerce Committee.

Senate Committee References: Community Affairs; Commerce and Tourism; and Rules.

UPDATE: The House bill was received by the Senate. The Senate bill has had no movement yet.

Single-use Plastic Straws - SB 588 (Hutson) and HB 603 (Sabatini) – These identical bills provide that a food service establishment may distribute a single-use plastic straw to a customer only if requested to do so by the customer; providing exceptions; providing that a food service establishment may make single-use plastic straws available through self-serve straw dispensers, etc. The effective date is July 1, 2019.

Senate Committee References: Commerce and Tourism; Community Affairs; and Rules.

House Committee References: Business and Professions Subcommittee; Appropriations Committee; and Commerce Committee.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

State Shared Revenues - SB 594 (Hutson) would require the Attorney General, at the request of one or more members of the Legislature, to investigate whether a certain official action of the governing body of a county or municipality violated state law or the State Constitution; requiring the Attorney General to report his or her findings and conclusions to the Governor, the Legislature, and the Secretary of State; providing requirements if no violation is found, etc. The effective date is July 1, 2019.

Senate Committee References: Community Affairs; Appropriations Subcommittee on Criminal and Civil Justice; and Appropriations.

House Companion: None.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Tax Increment Revenues - HB 605 (Casello) and SB 1038 (Rader) – these similar bills would authorize counties and municipalities to use increment revenues under specified conditions. The effective date is July 1, 2019.

House Committee References: Local, Federal & Veterans Affairs Subcommittee; Ways & Means Committee; and State Affairs Committee.
Senate Committee References: Community Affairs; Infrastructure and Security; and Rules.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Community Redevelopment Agencies – HB 9 (LaMarca) and SB 1054 (Lee) – The bill provides that the creation of new CRAs on or after October 1, 2019, may only occur upon approval at a county-wide referendum held during a primary or general election and approved by two-thirds of the qualified electors. It provides for the phase-out of existing CRAs at the earlier of the expiration date stated in the agency's charter or on September 30, 2039, with the exception of those CRAs with any outstanding bond obligations. However, the governing board of a creating local government entity may prevent the phase-out of a CRA by a two-thirds vote to retain the agency.

House Committee References: Local, Federal and Veterans Affairs Subcommittee; Ways and Means Committee; and State Affairs Committee.

Senate Committee References: Community Affairs; Appropriations Subcommittee on Transportation, Tourism, and Economic Development; and Appropriations.

UPDATE: On Wednesday, the House bill was received by the Senate. The Senate bill is waiting for a vote on the floor.

Collections of Residential Recyclable Material – HB 771 (Overdorf) and SB 816 (Perry) – these similar bills require counties and municipalities to address contamination of recyclable material in specified contracts. The effective date is July 1, 2019.

House Committee References: Local, Federal and Veterans Affairs Subcommittee; Agriculture and Natural Resources Subcommittee; and State Affairs Committee.

Senate Committee References: Environment and Natural Resources; Community Affairs; and Appropriations.

UPDATE: On Thursday, the House bill passed on the floor 87-23 and was received by the Senate. The Senate bill was placed on Special Order Calendar for 4/29.

Local Government Financial Reporting – HB 861 (Roach) and SB 1616 (Baxley) – requires county and municipality budget officers to submit certain information to EDR within specified timeframe. The effective date is upon becoming law.

House Committee References: Local, Federal & Veterans Affairs Subcommittee; Appropriations Committee; and State Affairs Committee.
Senate Committee References: Community Affairs; Governmental Oversight and Accountability; and Rules.

UPDATE: On Tuesday, Rules passed the Senate bill 16-0. It is now eligible for a vote on the Senate floor. On Wednesday, the House bill was received by the Senate.

Local Government Fiscal Transparency – HB 15 (Burton) and SB 1350 (Hutson) - revises Legislative Auditing Committee duties; specifies purpose of local government fiscal transparency requirements; requires local governments to post voting record information on websites. The effective date is July 1, 2019.

House Committee References: Local, Federal and Veterans Affairs Subcommittee; Ways and Means Committee; and State Affairs Committee.

Senate Committee References: Community Affairs; Commerce and Tourism; and Appropriations.

UPDATE: The House bill was received by Senate. The Senate bill has had no movement yet.

Public Records - HB 1201 (Jacobs) - Revises definition of "medical examiner"; provides legal guardian or sibling access to photograph, video or audio recording of autopsy; provides that legal guardian or sibling shall be given reasonable notice of opportunity to be present & heard at any hearing on petition to view or make copy of such photograph or recording; provides exemption from public records requirements; provides for future legislative review & repeal; provides retroactive applicability. The effective date is upon becoming law.

House Committee References: Oversight, Transparency & Public Management Subcommittee; Judiciary Committee; and State Affairs Committee.

Senate Companion: None.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Homestead Exemptions - HB 1205 (Rodriguez, A.) and SB 562 (Diaz) - Provides homestead assessment limitation from school district levies for certain persons age 65 or older; authorizes persons receiving certain homestead exemption & persons holding joint title with right of survivorship to receive limitation; provides procedures for use by property appraiser in limitation granted inappropriately; provides lien requirements. The effective date is on the effective date of the amendment to the State Constitution proposed by HJR 317.
House Committee References: Ways & Means Committee; Education Committee; and Appropriations Committee.

Senate Committee References: Community Affairs; Finance and Tax; and Appropriations.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Legal Notices - HB 1235 (Fine) and SB 1676 (Baxley) - Removes provisions relating to publication of legal notices in newspapers; requires counties to publish legal notices on their websites; requires counties to provide specified notice to residents concerning alternative methods of receiving notices; specifies form for affidavits of publication. The effective date is July 1, 2020.

House Committee References: Local, Federal & Veterans Affairs Subcommittee and Judiciary Committee

Senate Committee References: Judiciary; Governmental Oversight and Accountability; and Rules.

UPDATE: On Wednesday, the House bill was received by the Senate. The Senate bill has had no movement yet.

Modernizing Government - HB 1255 (Grant, J and Wilhite) - Creates Department of Interoperability & Technology within DMS; provides that department is separate budget program; provides that head of department is chief digital officer; provides purpose of department; provides powers, duties, & functions of department. The effective date is upon becoming law.

House Committee References: Oversight, Transparency & Public Management Subcommittee; Government Operations & Technology Appropriations Subcommittee; and State Affairs Committee.

Senate Companion: None.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Tax Exemption for Use of Real Property - HB 1271 (Caruso) and SB 1586 (Gruters) - Exempts from tax rental, lease, or license for use of certain real property in certain circumstances; requires DOR to determine just value of such property in certain circumstances; provides requirements for such determination. The effective date is July 1, 2019.
UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Legislative Preemption - HB 1273 (Gaff-Marcell) and SB 1698 (Berman) - Proposes s. 22 of Art. III of State Constitution to require supermajority of each house to approve general law preempting subject of legislation to state. The effective date is not specified.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

Governmental Powers - HB 1299 (Roach) - Prohibits municipality & governmental entity from purchasing & annexing areas outside their jurisdictions under certain circumstances; prohibits municipality from levying excise taxes on tobacco & nicotine products & nicotine dispensing devices; provides that food service establishment may distribute single-use plastic straw to customer only if requested to do so by customer; preempts to state: regulation of single-use plastic straws, over-the-counter proprietary drugs & cosmetics, establishment of requirements for alternate generated power sources, & establishment of minimum age for sale or delivery of tobacco products, nicotine products & dispensing devices. The effective date is July 1, 2019.

UPDATE: On Friday, the bill was amended and placed on Third Reading for 4/29.

Government-sponsored Recreation Programs - HB 1305 (Jacquet) and SB 1492 (Book)- Revises definition of term "child care facility" to exclude government-sponsored recreation programs; defines term "government-sponsored recreation program. The effective date is July 1, 2019.
House Committee References: Children, Families & Seniors Subcommittee; Health Care Appropriations Subcommittee; and Health & Human Services Committee.

Senate Committee References: Children, Families, and Elder Affairs; Governmental Oversight and Accountability; and Rules.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Land Acquisition Trust Fund** - HB 1341 (Ansley) and SB 944 (Stewart) - Requires specified annual appropriation to Florida Forever Trust Fund; prohibits moneys from Land Acquisition Trust Fund from being used for specified costs. The effective date is July 1, 2019.

House Committee References: Agriculture & Natural Resources Appropriations Subcommittee; State Affairs Committee; and Appropriations Committee.

Senate Committee References: Environment and Natural Resources; Appropriations Subcommittee on Agriculture, Environment, and General Government; and Appropriations.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Stormwater Management Systems** - HB 1343 (Good) and SB 1344 (Cruz) - Clarifying the duty of the Department of Environmental Protection to adopt, in coordination with the water management districts, specified statewide environmental resource permitting rules; directing the water management districts, with department oversight, to adopt rules for specified design and performance standards relating to new development and redevelopment projects, etc. The effective date is July 1, 2019.

House Committee References: Agriculture & Natural Resources Subcommittee; Agriculture & Natural Resources Appropriations Subcommittee; and State Affairs Committee.

Senate Committee References: Environment and Natural Resources; Appropriations Subcommittee on Agriculture, Environment, and General Government; and Appropriations.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Elections** - HB 1365 (Thompson) and SB 1802 (Stewart) - Provides that Secretary of State shall be elected; provides that person may register to vote & cast ballot on election day; provides
that General Election Day is paid holiday; requires Division of Elections to maintain strategic
elections equipment reserve; provides that person may cast provisional vote in the county in
which voter claims to be registered; revises provisions relating to vote-by-mail ballots; prohibits
certain persons from serving on Elections Canvassing Commission or county canvassing board.
The effective date is July 1, 2019.

House Committee References: Oversight, Transparency & Public Management
Subcommittee; Appropriations Committee; and State Affairs Committee.

Senate Committee References: Ethics and Elections; Governmental Oversight and
Accountability; and Rules.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this
bill appears to be dead for the 2019 Legislative Session.

Taxation - HB 1377 (Mercado) - Imposes sales tax on specified services; specifies that only
services performed in state are taxable; specifies calculation of tax on services not performed in
state; requires dealer to collect tax; specifies transaction to which tax does not apply; creates Joint
Legislative Sales & Use Tax Review Committee; provides duties of committee; exempts certain
products from sales & use tax; provides for review & repeal of specified tax exemptions, tax
exclusions, tax credits, & tax reductions; requires OLS to certify upcoming exemptions,
exclusions, tax credits, & tax reductions; requires Legislature to consider specified items during
its review; removes teacher certification examination fees; creates an anti-terrorism and vacant
property tax; provides amount, methods of collection; penalties & uses of money. The effective
date is July 1, 2019.

House Committee References: Ways & Means Committee and Appropriations
Committee.

Senate Companion: None.

UPDATE: Dead - While nothing is dead until the gavel comes down on Sine Die, this
bill appears to be dead for the 2019 Legislative Session.

Emergency Alerts - HB 1385 (Rommel) and SB 790 (Simmons)-- These identical bills
authorize issuance of Yellow Alert, Lockdown Alert, and Imminent Threat alert for certain
purposes under certain circumstances; provides requirements for issuance of alerts; requires
cooperation among law enforcement agencies, FHP, FDLE, DHSMV, & DOT for certain alerts.
The effective date is October 1, 2019.

House Committee References: Criminal Justice Subcommittee; Appropriations
Committee; and Judiciary Committee.
Senate Committee References: Infrastructure and Security; Criminal Justice; and Rules.

**UPDATE: Dead** - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Local Business Tax- HB 1387 (Donalds) and SB 868 (Hutson)** – These similar bills revise the authority of a governing body of a county to levy business taxes; deleting exceptions from certain apportionment and distribution requirements for certain counties; reducing the maximum fees for certain receipt transfers, etc. The effective date is July 1, 2019.

House Committee References: Local, Federal & Veterans Affairs Subcommittee; Ways & Means Committee; and State Affairs Committee.

Senate Committee References: Community Affairs; Finance and Tax; and Appropriations.

**UPDATE: Dead** - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Limitations on Homestead Assessments - HB 1389 (Grant, J) and SJR 326 (Brandes)** - Proposes amendments to State Constitution to increase period of time during which accrued benefit from specified limitations on homestead property tax assessments may be transferred from prior homestead to new homestead. The effective date is not specified.

House Committee References: Local, Federal & Veterans Affairs Subcommittee; Ways & Means Committee; and State Affairs Committee.

Senate Committee References: Community Affairs; Finance and Tax; and Appropriations.

**UPDATE: Dead** - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Ethics - HB 1403 (Drake) and SB 58 (Book)** - Prohibits person, including member of Legislature, from engaging in disorderly or contemptuous conduct; provides procedure for investigating & punishing disorderly or contemptuous conduct while Legislature is in session; revises form of oath required for certain candidates to qualify for nomination or election to office; prohibits candidate from knowingly making or causing to be made materially false statement about opposing candidate; provides penalties. The effective date is July 1, 2019.

House Committee References: Public Integrity & Ethics Committee; Oversight, Transparency & Public Management Subcommittee; and State Affairs Committee.
Senate Committee References: Judiciary; Criminal Justice; and Rules.

**UPDATE: Dead** - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Local Regulation of Firearms and Ammunition - HB 6061 (Diamond) and SB 1532 (Ronson)** - Repeals provisions relating to preemption of field of regulation of firearms & ammunition to state & penalizing violations. The effective date is upon becoming a law.

House Committee References: Criminal Justice Subcommittee; Local, Federal & Veterans Affairs Subcommittee; and Judiciary Committee.

Senate Committee References: Judiciary; Criminal Justice; and Rules.

**UPDATE: Dead** - While nothing is dead until the gavel comes down on Sine Die, this bill appears to be dead for the 2019 Legislative Session.

**Taxation Transparency — HB 7053 (Ways & Means Committee and Avila)** - Renames certain fees & assessments as taxes; renames certain surcharges as surtaxes; renames certain fees as surtaxes; requires municipalities, counties, & special districts to rename certain levies & assessments as specified taxes. The effective date is January 1, 2020.

House Committee References: Appropriations Committee and State Affairs Committee

Senate Companion: None.

**UPDATE:** The bill is waiting for a vote on the House floor.

**Property Rights — SB 1720 (Lee) and HB 1383 (Grant, J)** - Providing applicability relating to claims that involve one or more residential properties which are brought as a result of certain regulations or ordinances; authorizing a property owner to waive a jury and request that the court make a determination of compensation; authorizing a property owner to bring an action to declare a prohibited exaction invalid, etc. The effective date is July 1, 2019.

Senate Committee References: Judiciary; Community Affairs; and Rules.

House Committee References: Civil Justice Subcommittee; Commerce Committee; and Judiciary Committee.

**UPDATE:** The House bill is waiting for a vote on the floor.

**Summary of Week Seven (April 22-26)**
Policy Priorities Keep Moving

Through the remaining days of Session, the House and Senate are expected to hold day-long floor sessions. They plan to break for a final time on Friday, the tentative Sine Die to Session. In the meantime, legislative priorities in both chambers will likely see some action across the Capitol. The Senate, for example, is soon expected to pass a repeal to the state’s “certificate of need” process for health providers. It reportedly includes language that the House has agreed to. The repeal is one of Oliva’s top priorities.

The Senate also passed a plan this week that would kickstart a project to build or expand three major highways in the state, including expanding the Suncoast Parkway to the Florida-Georgia line. The House has an identical bill but has yet to take it up on the floor.

House Targets Beverage Regulations

The House has taken the lead on addressing the state’s alcoholic beverage laws. So far, the chamber has backed two major changes: a bill to increase the threshold on spirit-makers’ production and a bill that would eliminate a cap on wine-bottle sizes.

The craft distillery change (HB 1219) is sponsored by Rep. Anthony Sabatini. The House this week approved that bill 71-41, sending it over the Senate. It raises the production ceiling to 250,000 gallons, up from the status quo of 75,000 gallons per year. The wine bill (HB 6037) passed the House floor earlier this month, but the Senate has yet to act on the measure. Sabatini’s bill also removed the wine-container cap.

Issue Roundup

- Budget negotiators seemingly agreed to fund VISIT FLORIDA at $19 million next year. In 2018, the tourism-marketing agency received $76 million in state funding. The House has long eyed the agency because of questionable past use of tax dollars. VISIT FLORIDA has a sunset date written into current law that would close the agency on Oct. 1. Speaker Oliva, however, has indicated he would hear a bill to repeal that date because the Senate acquiesced to the House’s funding cut.

- The House this week passed its version of the 2019-20 fiscal year tax cut package. The $102.4 million plan includes a three-day back-to-school tax holiday in August. It also would offer a weeklong tax holiday for hurricane supplies in late May. As well, the plan cuts the commercial lease tax rate from 5.7 percent to 5.35 percent.
The Senate this week passed an education bill that in part seeks to expand school choice in Florida. One provision would create the “Family Empowerment Scholarship Program,” which would offer private-school vouchers to lower-income families. The scholarship would cover up to 18,000 K-12 students annually.

**Preview of Session Week Eight (April 29-May3)**

**Looking Ahead**

The Senate is scheduled to meet at 10 a.m. every day next week. The House is expected to meet at 10:30 a.m. every day.

Calendars for each floor session have yet to be determined. But look for major priorities to swap back and forth between the chambers. As well, lawmakers are expected to pass their 2019-20 spending plan on the floor this week.

The Senate session schedule for Week 9 can be found here:


The House session schedule for Week 9 can be found here:

2019 Legislative Session Final Report
Prepared for the City of Port St. Lucie

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I. BUDGET ISSUES

2019 General Appropriations Act

Each year, the Florida Legislature meets in Tallahassee for a 60-day Legislative Session. During that time, they pass numerous pieces of legislation. There is only one bill they are constitutionally mandated to pass, a balanced budget. Areas within this section include the subsections found within the 2019-2020 Fiscal Year Budget.

City of Port St. Lucie Appropriations

The City once again enjoyed legislative success in the appropriations process. With what proved to be a difficult Session for appropriations, due to pressures from Hurricane Michael, healthcare and education funding, the City secured $893,750 for its Hegener Drive Extension (Senate Form 2318 and HB 3865). As of the time this report was prepared, the Governor had not yet received, or acted on the budget.

SB 2500

After an extensive budget conference between the House and Senate, the Legislature agreed upon a $91.1 billion balanced budget, more than a 2.68% increase from last fiscal year’s 2018-2019 budget.

The proposed budget is broken down as follows:
- General Revenue Funds: $34.0 billion
- State Trust Funds: $57.1 billion

Pre-K-12 Education

The Legislature approved a $21.9 billion appropriation package for the Florida Education Finance Program (FEFP), a $783 million, or 3.72%, increase when compared to current spending. The appropriation provides $7,672 per student, which represents an average increase of $242.60, or 127%, in per-student funding from last year’s budget.

The Legislature adopted a similar position to last year and rolled back the Required Local Effort (RLE) millage rate from 4.075 to 3.927 mills, so the only additional revenue comes from new construction, not increasing property values.

The Legislature also approved a $285 million allocation to revamp the state’s Best and Brightest Teacher and Principal Scholarship program. Specifically, the Legislature transferred the scholarship program to the FEFP and modified the performance requirements for personnel to receive the awards.

Higher Education

Representing roughly a 1% increase over the current year’s allocation, University funding was allocated $5.1 billion. State College funding increased 40%, receiving $2.04 billion from the total budget.

Health and Human Services

The Legislature approved a $37.67 billion appropriation package for Health and Human Services. This represents $327.2 billion...
million for safety net hospitals that handle a large number of Medicaid patients and $83.3 million for the treatment and prevention of opioid abuse. Medicaid also received a $94.4 million allocation for workload and price increases.

Additionally, the budget saw a $3.8 million allocation to increase slots for both the Alzheimer’s Disease Initiative (151 slots) and the Community Care for the Elderly (CCE) program (256 slots).

Criminal Justice and Corrections
The Legislature approved a $560 million budget for the Judicial Branch. Included within the criminal justice budget is a base pay increase for assistant state attorneys and assistant public defenders to $50,000. The budget included $13.9 million to continue and expand prevention and early intervention programs within the Department of Juvenile Justice. Additionally, the State Court System will be infused with $2.54 million to enhance funding for problem-solving courts (such as Veterans’ Courts, Drug Courts, and Early Childhood Courts).

Natural Resources and Environment
The Legislature allocated $6.1 billion from the total budget to agriculture, environmental and general government services. This total allocation includes $1.8 billion on environmental projects. Everglades restoration will be infused with $367.2 million from the total state budget, and water quality improvements will receive $149.1 million. The Florida Forever Program has been allocated $33 million.

Also included within the natural resources and environment budget is an $11.6 million allocation to acquisition of wildfire suppression equipment and aircraft. In response to citrus greening, the Legislature approved $2.4 million in citrus crop decline supplemental funding, $6.4 million for the Citrus Health Response Program, and $8 million for citrus greening research.

Transportation and Economic Development
The Transportation, Tourism, and Economic Development budget was approved at $15.2 billion, including $71.3 million for the Small County Outreach Program and $29.3 million for Small County Resurface Assistance Program. The Department of Transportation (DOT) Work Program is funded at $9.8 billion; however, the budget contains a high number of local transportation member projects, which are funded from the State Transportation Trust Fund, taking funds from projects that are in the DOT work program.

Additionally, the budget provides $200.6 million for additional affordable housing, with $115 million of this allocation going toward Hurricane Michael recovery. The budget also provides $50 million for Visit Florida.

General Government
The Department of State will receive $64.9 million for state aid to libraries, cultural and museum programs, and historic preservation. Additionally, the Division of Emergency Management has been provided $1.94 billion for Federally Declared Disasters.
Of the 3,491 bills filed for the 2019 Legislative Session, only 197 of them passed through both the House and Senate and will be sent to Governor Ron DeSantis. Broken down, 166 were general bills, 14 were local bills, and 5 were claim bills. There were also 2 concurrent resolutions, 1 memorial, 6 public records bills, and 3 revisers' bills enrolled.

Many pieces of legislation provided in the following subsections were also priority bills that were monitored by the Florida League of Cities and the Florida Association of Counties.

**Tax Bills That Did Pass**

Legislation included in this subsection are bills that did pass the Legislature and relate to taxation. Among the bills passed by both chambers are new requirements for a local government’s imposition of impact fees and for discretionary sales surtaxes. Bills were also passed relating to permit fees and inspection fees, including those related to the construction of telecommunications facilities.

**Taxation – HB 7123**

Sponsored by the House Ways and Means Committee and Rep. Avila, this bill includes two sales tax holidays; a three-day back-to-school holiday; and a seven-day disaster preparedness holiday. The bill also includes a reduction of the tax on commercial leases from 5.7% to 5.35%. It also changes the timing of payments to local governments in fiscally constrained counties and Monroe County to offset property tax refunds granted to homeowners due to hurricanes in 2016 and 2017. A controversial provision requiring school districts to share discretionary operating property tax levies with charter schools was initially removed by the Senate but subsequently added back in to apply only to future referenda. The bill passed the Senate with 17 Nay votes and passed the House with 25 Nay votes. Governor DeSantis approved the bill on May 15, 2019. (SB 1412 by Sen. Gruters is the companion legislation.)

**Community Development and Housing – HB 7103**

Sponsored by the House Commerce Committee and Rep. Fischer, this bill imposes numerous requirements affecting a local government’s authority in overseeing municipal planning and development, including the implementation of affordable housing. The bill restricts local governments from imposing certain mandatory affordable housing ordinances (known as inclusionary zoning), requiring them to provide incentives to “fully offset” any costs a developer incurs when making affordable housing contributions.

Additionally, HB 7103 does the following:

- Authorizes local governments to exempt or waive impact fees for affordable housing projects;
- Imposes time limits for a county or municipality to review applications for development orders or permits and provides procedures for addressing deficiencies;
- Requires municipal comprehensive plans adopted after January 1, 2019, and their corresponding land development regulations, to incorporate the terms of existing development orders;
- Requires mobility fee-based funding systems to be governed by the impact fee statutes;
• Requires credits for required contributions for public educational facility development be allocated to reduce applicable impact fees on a dollar-for-dollar basis at fair market value for the entire impact fee imposed rather than just those exactions imposed for a specific educational facility;
• Places additional requirements for the imposition of impact fees, including an implementation of the 'dual rational nexus test';
• Amends how local governments impose or give credits for impact fees and clarifies that water and sewer connection fees are not governed as impact fees;
• Allows parties to a development order challenge to use summary proceedings under sect. 51.011, Fla. Stat., and allows the prevailing party in a development order challenge to recover reasonable attorney fees;
• Provides legislative findings about the need for to develop affordable workforce housing and creates a new definition for “essential services personnel;”
• Limits the tolling and extension of time to exercise rights under a development order, building permit, certain environmental permits, or the buildout date for a development of regional impact to the time covered by declaration of a state of emergency by the Governor for a natural emergency;
• Expands the scope of work for private providers who review site plans and inspect buildings;
• Reduces the time from 30 business days to 20 business days for building departments to review permit applications when a private provider approves the plans;
• Limits local government’s authority to audit a private provider to four times annually and prohibits a building official from replicating plan reviews or inspections done by a private provider;
• Prevents a local government from charging any fees for building inspections for projects that utilized a private provider, except for a “reasonable administrative fee;”
• Requires condominium associations to ensure facility compliance with the Florida Fire Prevention Code, while providing an exemption for timeshare condominium associations;
• Requires the State Fire Marshall to collect data and submit a report regarding high-rise condominiums greater than 75 feet in height, which have not retrofitted with a fire sprinkler system or an engineered life safety system in accordance with state law.

HB 7103 passed the Legislature by moderately narrow margins (Senate: 26/13, House: 66/42) on May 3, 2019, and now a final enrolled version of the bill awaits the Governor’s action. (SB 1730 by Sen. Lee is the companion legislation.)

Construction – HB 447

Sponsored by Rep. Diamond, this bill makes several changes relating to construction permitting, local governments, contractors, property owners, and the Florida Building Commission.

Specifically, the legislation:
• Allows local governments to send written notice to an owner and a contractor that a building permit is about to expire.
• Allows local governments to close a building permit 6 years after the issuance of the permit, even in the absence of a final inspection, if the local government determines that no apparent safety hazards exist.
• Provides that the work to close an expired permit can be completed in accordance with the Building Code in effect when the building department received the permit application if the work has already been substantially completed.
• Excludes a property owner, working under the owner-builder exemption, from the requirement that the owner reside on the property for a year in order to qualify for the exemption, in certain situations.
• Provides that local governments may only charge a person one search fee based on a request to identify the building permits for units or sub-units assigned to one parcel of property.
• Prohibits local governments from penalizing a purchaser of property solely because a previous owner failed to close a building permit.
• Prohibits local governments from denying a contractor a permit solely because the contractor has expired building permits.
• Prohibits local governments from carrying forward a budget balance greater than its average cost for enforcing the Building Code for the preceding four fiscal years.
• Prohibits local governments from charging surcharges or other similar fees.
• Allows the Florida Building Commission to adopt provisions to the Building Code every 3 years without individually determining that each provision is needed to accommodate the specific needs of the state.
• Provides that a contractor who takes over a job from a previous contractor is not liable for any defects in the work performed by the previous contractor.
• Provides that serving a notice of claim alleging a construction defect does not affect the time-period to file an action related to the construction defect.

The bill passed both the House and Senate unanimously. The bill was enrolled on May 6, 2019. (SB 902 by Sen. Perry is the companion legislation.)

Ballot Measures (Discretionary Sales Surtaxes) — HB 5

Sponsored by Rep. DiCeglie, this bill requires a two-thirds (2/3) vote of the board of county commissioners to approve a referendum for a local option sales tax. The referendum must be held on a general election and approved by two-thirds of the voting electors to be enacted. The bill also revises the process for triggering the performance audit currently required. Specifically, the bill provides that upon adoption of an ordinance by a local government to hold a discretionary sales surtax referendum, the local government must notify the Office of Program Policy Analysis and Government Accountability (OPPAGA) at least 180 days before the referendum is held. It establishes a process for notifying OPPAGA of the need for a performance audit when a proposal to adopt a discretionary sales surtax is by initiative. Finally, the bill revises regulations relating to petition circulators. (See: “Election Bills That Did Pass” for further discussion.)

The bill passed the Senate with 17 Nay votes and passed the House with 43 Nay votes. It was enrolled on May 8, 2019. (SB 336 by Sen. Brandes is the companion legislation.)

Communications Services — SB 1000

Sponsored by Sen. Hutson, this bill substantially expands special permitting and timeframe considerations that were given to the telecommunications industry in 2017 for the deployment of 5G technology. The bill expands the shot clock, or permit compliance times, and preemptions to include not just 5G collocations but all new communications facilities, including new poles. With this bill, cities and counties lose the ability to prohibit new poles even in underground areas. The bill passed the Senate with 3 Nay votes and passed the House with 16 Nay votes. The bill was enrolled on May 1, 2019. (HB 693 by Rep. Fischer is the companion legislation.)
### Impact Fees – HB 207

Sponsored by Rep. Donalds, this bill requires local government impact fee ordinances to include the so-called 'Dual-Rational Nexus' test provision. This provision was laid out in several landmark court rulings and requires impact fees to (1) be based on a reasonable connection, or nexus, between the need for additional capital facilities and the growth generated by the project, and (2) a reasonable connection, or nexus, between the expenditures of the funds collected from the impact fees and the benefits accruing to the subdivision or project. Multiple counties are concerned by the provision that dictates that an impact fee may not be required to occur earlier than the date of issuance of the building permit for the property that is subject to the fee. The bill passed the Senate with 1 Nay vote and passed the House with 12 Nay votes. A final enrolled version of HB 207 was filed on April 10, 2019. (SB 144 by Sen. Gruters is the companion legislation.)

### Permit Fees – HB 127

Sponsored by Rep. Williamson, this bill requires governing bodies and counties and municipalities to post permit and inspection fees scheduled and building permit inspection utilization reports on websites by December 31, 2020 and to update the report before adjusting fee schedules in the future. HB 127 passed both chambers unanimously, and a final version of the bill was enrolled on April 3, 2019. (SB 142 by Sen. Perry is the companion legislation.)

### Tax Bills That Did Not Pass

Legislation included in this subsection are bills that did not pass the Legislature and relate to taxation. Among the bills that did not pass this session are bills related to real and personal property tax exemptions, restrictions on local government business taxes, notice requirements for millage rates, expansion of the homestead tax exemption, and revising the district cost differential calculation process.

#### Assessment of Property – SB 568

Sponsored by Sen. Diaz, and HB 443, sponsored by Rep. Ant. Rodriguez, this bill would have authorized local governments to enter into agreements with certain property owners to record a restrictive covenant stating that the property will be used for affordable of low-income housing. The bill also would have amended sect. 196.183, F.S., revising the requirements that allow property appraisers to obtain an exemption of up to $25,000 on the state's tangible personal property ("TPP") tax. Both bills died in their second committees of reference.

Taxes on Transparency – HB 7053, sponsored by the House Ways and Means Committee and Rep. Avila, would re-designate several state and local revenue sources, requiring the names of those source to be changed from “fee” to “tax.” Specifically, the bill would have required the following local revenue source re-designations: (i) Special assessments or non-as valorem assessments would be retitled “special benefit tax”; (ii) Impact fees and mobility fees would be retitled “development impact tax”; (iii) Franchise fees would be retitled “franchise tax.” The bill was heard in its final committee on April 4, 2019 but was never heard on the House floor or in Senate committees.

#### Local Business Tax – SB 868

Sponsored by Sen. Hutson, and HB 1387, sponsored by Rep. Donalds, this bill would have ceased a local government’s ability to levy a local business tax and reduced fees for existing ones. Neither bill was heard in its assigned committees of reference.
Millage Notices – HB 399

Sponsored by Rep. DiCeccile, and SB 564, sponsored by Sen. Hooper, this bill would have authorized property appraisers to make proposed property tax and non-ad valorem assessment notices available on their website in lieu of mailing notices. In addition, the bills would have required property appraisers to hold a public hearing before posting notices as well as specifies guidelines for the implementation of the new web-based notice system. Neither bill made it out of the committee stage.

Homestead Tax Exemption – HB 317 and HB 1205

Sponsored by Rep. Ant. Rodriguez, and SB 344 and 502, sponsored by Sen. Diaz, this bill would have provided the homestead tax exemption from school district levies to persons age 65 or older who have legal or equitable title to homestead property, and who have maintained permanent residence thereon for at least 25 years. No bills pertaining to this legislation made it out of the committee stage.

Property Tax Exemptions – HB 51

Sponsored by Rep. Sirois, and SB 202, sponsored by Sen. Wright, this bill would have increased the property tax exemption for residents who are widows, widowers, blind, or totally and permanently disabled. Neither bill made it out of the committee stage.

District Cost Differential – HB 1031

Sponsored by Rep. Aloupis, and SB 1284, sponsored by Sen. Diaz, this bill would have amended the District Cost Differential (DCD) determination process to include information regarding county-level wage index data and occupational-level wage index data. Informed stakeholders such as school districts, industry representatives, the Department of Economic Opportunity, and academic and private sector experts would have been consulted throughout the process. HB 1031 was not heard in any of its assigned committees, and SB 1284 was not heard in its final two committees of reference.

Transportation Bills That Did Pass

Legislation included in this subsection are bills that passed the Legislature relating to transportation. These bills include a plan to expand state infrastructure with three regional corridors, guidance for counties on how to spend surtax profits for transportation purposes, the designation of texting-while-driving as a primary offense, and allowing local governments to regulate micromobility devices.

Transportation – SB 7068

Sponsored by the Senate Infrastructure and Security Committee, this bill creates the Multi-use Corridors of Regional Economic Significance (M-CORES) Program within the Florida Department of Transportation (FDOT). The M-CORES Program is designed to advance the planning and design of three regional corridors that will accommodate multi-modal transportation and various infrastructure improvements including broadband and sewer access, among others. This legislation is a priority of Senate President Bill Galvano. The bill passed the Senate with 1 Nay vote and passed the House with 36 Nay votes. A final enrolled version of SB 7068 was filed on May 1, 2019 and presented to Governor DeSantis on May 13, 2019. (HB 7113 by the House Transportation and Tourism Appropriations Subcommittee and Rep. Trumbull is the companion legislation.)
Transportation — HB 385

Sponsored by Rep. Avila and Rep. Perez, this bill dissolves the Miami-Dade Expressway Authority (MDX) and creates the Greater Miami Expressway Authority. The bill also restricts certain counties' use of surtax proceeds for certain transportation projects such as fixed guideway rapid transit systems, rail systems, bus systems, development of dedicated facilities for autonomous vehicles, and certain services. The bill authorizes a percentage of surtax proceeds to be distributed to certain municipalities. Furthermore, the bill authorizes the department to establish a program for transportation projects that demonstrate certain innovative techniques for measuring resiliency and structural integrity and controlling time and cost increases. Lastly, the bill authorizes an electronic copy, instead of a true copy, of rental or lease documentation issued for a motor vehicle or a replacement vehicle in the same registration period to be in the possession of the operator or carried in the vehicle and exhibited upon demand of any authorized law enforcement officer or agent of the department. The bill passed the Senate with 16 Nay votes and passed the House with 28 Nays votes. The bill was enrolled on May 3, 2019. (SB 898 by Sen. Diaz is the companion legislation.)

Wireless Communications While Driving — HB 107

Sponsored by Rep. Slosberg and Rep. Toledo, this bill changes current enforcement of the ban on texting while driving from a secondary offense to a primary offense, which will allow a law enforcement officer to stop a vehicle solely for texting while driving. The bill also creates a new section of statute titled "school and work zones; prohibition on the use of a wireless communications device in a handheld manner." It authorizes enforcement of a ban on the use of a wireless communications device in a handheld manner while operating a motor vehicle in a designated school crossing, school zone, or active work zone area as a primary offense punishable as a moving violation. If approved by Governor DeSantis, these provisions take effect July 1, 2019, with a later effective date of October 1, 2019, for the implementation of the prohibition on the use of a wireless communications device in a handheld manner in school and work zones. The bill passed the Senate with 5 Nay votes and passed the House with 7 Nay votes. A final enrolled version of the bill was filed on April 29, 2019. (SB 76 by Sen. Simpson is the companion legislation.)

Micromobility Devices — HB 453

Sponsored by Rep. Toledo, this bill defines the term "micromobility device" as a motorized transportation device that is not capable of traveling faster than twenty miles per hour and is made available for private use by online reservation. The bill also updates the definition of motorized scooter to encompass micromobility devices. The bill allows for local regulation of micromobility devices and motorized scooters on all streets, highways, sidewalks, and sidewalk areas within the local government's jurisdiction. Originally, the legislation would have largely preempted any local regulation of these devices; however, the preemptions were amended out after negotiation between the stakeholders. The bill passed through both chambers with near-unanimous margins and a final enrolled version was filed on May 1, 2019. (SB 542 by Sen. Brandes is the companion legislation.)

Transportation Bills That Did Not Pass

Legislation included in this subsection are bills that did not pass through both chambers of the Legislature and are related to transportation. Among the topics addressed by the failed bills were the creation of a grant program for small road construction businesses as well as the use of drones for traffic management.
Small Business Road Construction Mitigation Grant Program – SB 112

Sponsored by Sen. Rodriguez, and HB 61, sponsored by Rep. Duran, this bill would have required FDOT to create a Small Business Road Construction Mitigation Grant Program. Additionally, the legislation would have required FDOT to disburse grants to qualified businesses for the purpose of maintaining the businesses during a road construction project. Neither bill was heard in its respective committees of reference.

Expanded Uses of Unmanned Aircraft – HB 75

Sponsored by Rep. C. Watson and Rep. Yarborough, and SB 766, sponsored by Sen. Gruters, the bills would have authorized the use of drones by law enforcement agencies to assist law enforcement in crowd control involving a group of 50 people or more, to assist law enforcement with traffic management, to facilitate evidence collection at a crime scene or traffic crash scene. Law enforcement would not have been authorized to gather evidence or information with drones except for when specifically provided in the bill. The House version passed out of the House, but neither bill made it out of the Senate.

Agriculture and Natural Resources Bills That Did Pass

Legislation included in this subsection are bills that passed both chambers and relate to Agriculture and Natural Resources. The bills included in this subsection address personal property rights related to tree trimming, coastal management and erosion control, local government environmental regulations, and red tide research.

Private Property Rights (Tree Trimming) – HB 1159

Sponsored by Rep. LaRosa, the bill prohibits local governments from requiring a permit, application, notice, fee, approval, or mitigation for the pruning, trimming, or removal of a dangerous tree on residential property upon documentation by a certified arborist or licensed landscape architect, and prohibits local governments from requiring a property owner to replant a tree that is maintained under the specified conditions. The bill does not affect authority delegated under the state’s mangrove protection laws. The bill also allows a property owner adjacent to an electric utility right-of-way to request an electric utility perform vegetation maintenance in the right-of-way without approval from the local government. Lastly, the bill requires county property appraisers to post a Property Owner Bill of Rights on their websites, which lists a property owner’s right to acquire, possess, and protect property; use and enjoy property; exclude others from property; dispose of property; due process; just compensation for property taken for a public purpose; and relief when a new state or local government law, rule, regulation, or ordinance unfairly affects property. The website must state the Bill of Rights is not comprehensive and does not represent all property rights under Florida law. The bill passed the Senate with 16 Nay votes and passed the House with 36 Nay votes, and was enrolled on April 29, 2019. (SB 1400 by Sen. Albritton is the companion legislation.)

Coastal Management – HB 325

Sponsored by Rep. LaMarce, the bill revises and adds additional detail to the criteria DEP considers when ranking beach management and erosion control projects. Specifically, the bill directs DEP to implement a four-tiered scoring system to rank annual project funding priorities by July 1, 2020. The bill also updates DEP’s Comprehensive Long-Term Beach Management Plan development process, requiring a strategic beach management plan, critically eroded beaches report, and a three-year work plan. In past years, this legislation also included $50 million in recurring funding for the beach program; however, this section was removed, and the bill now only includes policy changes. The bill passed the House and Senate.
Environmental Regulation – HB 771

Sponsored by Rep. Overdorf, this bill requires counties and cities to address the contamination of recyclable material in contracts entered into for the collection, transport, and processing of residential recycling materials. Such contracts must define "contaminated recyclable material" in a manner that is appropriate for the local community, accounting for available markets and other relevant factors, and include terms and conditions to define and reduce levels of contamination. Additionally, the bill provides that a recyclable materials collector or facility is not required to collect, transport, or process "contaminated recyclable material", as defined in the applicable contract. In the final House committee stop, a section was added imposing a five-year moratorium on local regulations of single-use plastic straws. On the House floor, an OPPAGA study was added in conjunction with the moratorium. The bill passed the Senate with 15 Nay votes and passed the House with 23 Nay votes. Governor DeSantis vetoed HB 771 on May 10, 2019. (SB 816 by Sen. Perry is the companion legislation.)

Florida Red Tide Mitigation and Technology Development Initiative – SB 1552

Sponsored by Sen. Gruters, this bill establishes the Florida Red Tide Mitigation and Technology Development Initiative as a partnership between the Fish and Wildlife Conservation Commission’s Fish and Wildlife Research Institute and the Mote Marine Laboratory. The goal of the initiative is developing technologies and other approaches to mitigate the impacts of red tide. The bill passed nearly unanimously and was enrolled on April 30, 2019. (HB 1135 by Rep. M. Grant is the companion legislation.)

Agriculture and Natural Resources Bills That Did Not Pass

Legislation included in this subsection are bills that did not pass both chambers of the Legislature and address Agriculture and Natural Resources. Bills included in this subsection address water quality, particularly through increased regulation and oversight of septic tank systems.

Onsite Sewage Treatment and Disposal Systems – HB 85

Sponsored by Reps. Caruso and Robinson, and SB 214 sponsored by Sen. Gruters, the bill would have required the Florida Department of Health to implement a periodic inspection program and would have required owners of Onsite Sewage Treatment and Disposal Systems, or septic tanks, to have the systems inspected every five years beginning July 1, 2022, unless exempted. Neither bill made it out of the committee stage.

Water Quality

Major water quality legislation did not pass this year, although both chambers proposed various legislation relating to septic tanks, wastewater treatment, biosolids, basin management action plan (BMAP) requirements, and sewage spill notification requirements. While there was movement on a consolidated water quality package late in session, ultimately nothing substantive made it across the finish line, although the final budget does include funding for various water quality improvement measures. Many of these issues are expected to return next session.
Health and Human Services and Education Bills That Did Pass

Legislation included in this subsection are bills that did pass both chambers and address Health and Human Services. These bills comprise a range of topics that include the guardian program for Florida public schools, workforce education, and needle exchange programs. Other passed bills relate to improved 911 communications, health services for incarcerated women, and benefits for firefighters.

Implementation of Legislative Recommendations of the Marjory Stoneman Douglas High School Public Safety Commission – SB 7030

Sponsored by the Senate Education Committee, this bill passed both chambers with a close party line vote (Senate: 22/17, House: 65/47). Arguably, the most contested subject within the bill is a provision that allows public school teachers to carry firearms in schools.

Based on recommendations from the MSD Commission regarding the guardian program, Senate Bill 7030 amends s. 30.15, F.S., to require a sheriff to establish a guardian program if the local school board votes by majority to implement the program, or contract with another sheriff’s office that has established a program, to provide training to school district or charter school employees. A sheriff who has established a guardian program may contract to provide training to a school district or charter school employee employed in a county whose sheriff has not established a guardian program. The sheriff conducting the training will be reimbursed for screening-related and training-related costs and for providing a one-time stipend of $500 to each school guardian who participates in the school guardian program. Senate Bill 7030 also removes the prohibition on an individual who exclusively performs classroom duties as a classroom teacher from participating in the guardian program. Governor DeSantis approved the bill on May 8, 2019. (HB 7093 by the House Education Committee is the companion legislation.)

Workforce Education – HB 7071

Sponsored by the Higher Education and Career Readiness Subcommittee and Reps. Mariano and Massullo, Jr., this bill promotes apprenticeships by creating and enhancing multiple programs. The bill creates the “Strengthening Alignment between Industry and Learning to 60° Initiative and establishes a statewide attainment goal to increase the percentage of working-age adults who hold a high-value post-secondary certificate, degree, or training experience. It creates the Florida Apprenticeship Grant Program to provide competitive grants to expand and enhance apprenticeship and pre-apprenticeship programs. The bill requires the Department of Business and Professional Regulation (DBPR) to submit a report by December 1, 2019 regarding apprenticeship programs that could substitute for the educational training otherwise required for licensure. The bill passed both chambers unanimously and was enrolled on May 2, 2019. (SB 770 by Sen. Hutson is the companion legislation.)

Infectious Disease Elimination Programs – SB 366

Sponsored by Sen. Braynon, this bill is also known as the needle exchange program, and allows county commissions to establish sterile needle and syringe exchange programs through the adoption of a county ordinance and satisfaction of the specified program requirements. Exchange programs must cooperate with the Department of Health (DOH) and the local county health department. Local governments may elect to provide funding for a sterile needle and syringe program; however, the bill specifically prohibits the use of state funding. The program is voluntary and requires the county commission to opt-in through adoption of an ordinance and satisfaction of statutory requirements. There is no requirement for any
minimum funding level. The bill passed the Senate with 0 Nay votes and passed the House with 3 Nay votes. The bill was enrolled on May 7, 2019. (HB 171 by Rep. Jones is the companion legislation.)

E911 Direct Radio Communication – HB 441

Sponsored by Rep. DuBose, this bill requires the Technology Program Office within the Department of Management Services to develop and implement a plan that would enable 911 calls to be transferred from one local, multijurisdictional, or regional E911 system to another within the state. The statewide E911 response system would provide for better inter-county communication in the event that an emergency call from one county requires emergency response in another. Each county is required to develop a plan to implement countywide text-to-911 service and, by January 1, 2022, to enact a system that allows for text-to-911 service. The bill passed both chambers unanimously and was enrolled on April 30, 2019. (SB 536 by Sen. Brandes is the companion legislation.)

Incarcerated Women – HB 49

Sponsored by Reps. Jones and Mercado, this bill designates the "Dignity for Incarcerated Women Act" and requires state and county correctional facilities to provide incarcerated women with certain healthcare products (specifically tampons). Additionally, the bill provides requirements for male correctional employees and working group on standards for county detention facilities to adopt model standards for female prisoners. The bill passed both the House and Senate unanimously and was enrolled on April 29, 2019. (SB 332 by Sen. Pizzo is the companion legislation.)

Firefighters – SB 426

Sponsored by Sen. Flores, this bill allows firefighters who are diagnosed with certain cancers eligible to receive certain disability or death benefits. Specifically, in lieu of pursuing workers' compensation coverage, a firefighter is entitled to cancer treatment and a one-time cash payout of $25,000, upon the firefighter's initial diagnosis of cancer. To qualify for these benefits, firefighters must meet several employment and health-related requirements. In addition, the employer must provide coverage within an employer-sponsored health plan or through a group health insurance trust fund. The employer must timely reimburse the firefighter for any out-of-pocket deductible, co-payment, or coinsurance costs incurred due to the treatment of cancer. The Governor approved senate Bill 426 on May 3, 2019 after being approved unanimously by both the House and Senate. (HB 7129 by the House State Affairs Committee is the companion legislation.)

Health and Human Services and Education Bills That Did Not Pass

Legislation included in this subsection are bills that did not pass both chambers of the Legislature and are related to Health and Human Services. Included among these bills are those addressing homelessness, public records exemptions during emergencies, and defendants with mental illness.

Homelessness – HB 1353

Sponsored by Rep. Altman, and its companion SB 1218, sponsored by Sen. Book, this bill would have revised the state's method of defining homelessness by adopting the federal definition for "homeless" and aligning other state requirements with HUD requirements. HB 1353 passed the House floor, but its Senate companion died in committee.
Public Records/Public Shelter During an Emergency – SB 836

Sponsored by Sen. Powell, this bill created an exemption from public records requirements for certain information of a person using a public shelter during an emergency and provide for retroactive application of the exemption. The bill did not pass the Senate Infrastructure and Security Committee, its first committee of reference.

Defendants with Mental Illness – SB 1102

Sponsored by Sen. Harrell, and HB 1005, sponsored by Rep. Fetterhoff, this bill would have required a jail's staff to screen each defendant booked into a jail on misdemeanor charges using a certain instrument to determine if there is an indication of a mental health disorder. The bill also would have required an authorized professional completing a certain evaluation to issue a professional certificate if an evaluation of the defendant demonstrates that the defendant appears to meet the criteria for involuntary examination under the Baker Act. Neither bill made it past the committee stage.

Election Bills That Did Pass

Legislation included in this subsection are bills that passed the Legislature relating to elections. These bills include substantial changes to the Florida Election Code in response to challenges posed by the 2018 midterm elections.

Election Administration – SB 7066

Sponsored by the Senate Committee on Ethics and Elections, this bill makes substantial changes to the Florida Election Code. The legislation was proposed in response to challenges posed by the 2018 midterm elections and the passage of Amendment 4.

General Election Code Changes:

- The bill mandates that voters with disabilities cast their ballot on voting systems that produce a voter verifiable paper output (VVPO) for canvassing and recount purposes. Furthermore, the bill authorizes the general use of the VVPO touchscreen system by all voters.
- The bill prohibits the use of voting systems that cannot simultaneously count and sort ballot overvotes and undervotes in multiple races.
- The bill moves the primary election to 11 weeks before the general election. This is done to allow more time for overseas and general election ballots to be processed.
- The bill makes several changes relating to Vote By Mail (VBM). First, the bill moves the last day for voters to request VBM ballots to 10 days before an election and prohibits supervisors of elections from mailing out such ballots less than eight days prior to the election. Furthermore, voter designees would be able to physically pick up VBM ballots for electors beginning 9 days before an election. The bill also allows supervisors of elections to mail domestic VBM ballots between 40 and 33 days prior to an election. Additionally, voters would be allowed to drop off their VBM ballots at a secure drop box located at each early voting location and the supervisor of election's main office. Canvassing of VBM ballots would begin 22 days prior to an election. The bill permits a physically present candidate and political party/political committee officials, and/or their designees, to observe duplication of VBM ballots.
- The bill creates a provisional ballot signature cure process that mirrors the revised VBM signature cure process. Signatures may be cured through 5:00 p.m. on the second day after an election. The ballot-envelope voter's certificate now requests additional contact information. New phone and electronic notice requirements are provided for in the bill.
• The bill creates a process to use valid provisional and VBM ballot cure affidavits to update voter signatures immediately and provides for post-election notice to electors whose ballots are invalidated as a result of a signature discrepancy.
• The bill expands the no-solicitation zone around polling places to 150 feet.
• The bill allows a voter to take a photo of his or her ballot inside of the polling place.
• Precinct-level results by ballot type would be prohibited if 30 votes or fewer are cast to ensure voter anonymity.
• The bill has provisions related to ballot uniformity.
• The bill requires the Department of State to address in detail, the chain of custody of ballots, transport of ballots, and ballot security in its rules.
• The bill allows supervisors of elections to use ballot-on-demand printing systems at polling places on election day.
• If the supervisor of elections e-mails or mails every registered voter a sample ballot at least 7 days before an election, the bill allows the supervisor to forego publication of a sample ballot in a newspaper of general circulation.
• The bill requires members of the County Canvassing Boards to wear I.D. badges and mandates a number of meeting notice content and publication requirements.
• The bill prohibits a supervisor of elections from receiving a special qualification salary for a period of 24 months after being found to have willfully violated the Florida Election Code.
• The bill authorizes courts reviewing the validity of voter signatures in election contests to consider the signature on VBM/provisional ballot voter certificates and cure affidavits, along with voter ID submitted therewith.

Changes Related to Amendment 4:
• The bill revises requirements for the uniform statewide voter registration application to modify statements an applicant must affirm.
• The bill revises terminology regarding voting rights restoration to conform to the State Constitution.
• The bill requires the supervisor of elections of the county in which an ineligible voter is registered to notify the voter of instructions for seeking restoration of voting rights pursuant to s. 4, Art. VI of the State Constitution, in addition to restoration of civil rights pursuant to s. 8, Art. IV of the State Constitution and other specified information.
• The bill requires the Department of State to review information and make an initial determination regarding certain credible and reliable information, requires the department to forward specified information to supervisors of elections, and requires the supervisor of elections to make a final determination of whether a person who has been convicted of a felony offense is eligible to register to vote, including if he or she has completed all the terms of his or her sentence. The Department of State would be authorized to assist the supervisor of elections with such final determination.
• The bill requires specified provisions to be construed in favor of a voter registrant.
• The bill prohibits a person from being charged or convicted for violations regarding false swearing or submitting false voter registration information under certain conditions.
• The Department of Corrections would be required to inform inmates and offenders of voting rights restoration pursuant to s. 4, Art. VI of the State Constitution, in addition to executive clemency and civil rights restoration.
• The Department of Corrections would be required to include notification of all outstanding terms of sentence in an inmate's release documents. An exception to the notification requirement would be provided for inmates who are released to any type of supervision monitored by the department.
The bill requires the Florida Commission on Offender Review, upon the termination of an offender's term of parole, control release, or conditional release, to provide written notification to the offender of all outstanding terms of sentence. Upon the termination of an offender’s term of probation or community control, the department would provide written notification to the offender of all outstanding terms of sentence.

- Relating to county detention facilities, the bill requires each facility to provide information on the restoration of voting rights pursuant to s. 4, Art. VI of the State Constitution to certain prisoners. It also requires each county detention facility to provide written notification to certain prisoners of all outstanding terms of sentence upon release.

- The bill creates the Restoration of Voting Rights Work Groups, which will be required to submit a report to the Legislature.

The bill passed the Senate with 17 Nay votes and passed the House with 42 Nay votes. The bill was enrolled on May 7, 2019. (HB 7089 by the House Criminal Justice Subcommittee and Rep. J. Grant and HB 7101 by the House State Affairs Committee and Rep. Ingoglia are the companion bills to this legislation.)

Ballot Measures – HB 5

Sponsored by Rep. DiCeglie, the bill revises regulations relating to petition circulators. Specifically, the bill requires paid petition circulators to register with the Secretary of State and provide information such as their permanent and temporary address in addition to signing a sworn statement that they will follow state laws. The bill provides for penalties for failure to register as a petition circulator. Furthermore, the bill prohibits compensation for initiative petition circulators based on the number of petition forms gathered. The bill also requires petitions to be returned no more than 30 days after being signed by voters. Late submissions will result in a fine of up to $1000 for a petition “willfully” not submitted on time. Finally, the bill revises regulations relating to local referendums for local option sales taxes. (See: "TAX BILLS THAT DID PASS" for further discussion.)

The bill passed the Senate with 17 Nay votes and passed the House with 43 Nay votes. The bill was enrolled on May 8, 2019. (HB 7111 by the House Judiciary Committee and Rep. J. Grant and SB 7096 by the Senate Judiciary Committee are the companion bills to this legislation.)

Criminal Justice Bills That Did Pass

Legislation included in this subsection are bills that passed through the Legislature and are related to criminal justice and corrections. Included in this section are those bills related to sanctuary cities, protection of police animals, cell phones as correctional facility contraband, and lewd or lascivious acts in the presence of corrections personnel.

Federal Immigration Enforcement – SB 168

Sponsored by Sen. Gruters, the bill prohibits sanctuary policies and requires the repeal of all existing such policies. The bill also requires state and local governmental agencies to use best efforts to support enforcement of federal immigration law and provides requirements for immigration detainers. The bill would further require the Attorney General to prescribe a format for complaints, provides for injunctive relief and civil penalties for violations, and prohibits expenditure of public funds to entities who violate the Act. The bill also creates a cause of action for personal injury or wrongful death attributed to a sanctuary policy. Finally, the bill requires that actions made pursuant to the Act may not be based on the gender, race, religion, national origin, or physical disability of a person except to the extent permitted by the United States Constitution or the state constitution.
The bill narrowly passed both chambers with 18 Nay votes in the Senate and 45 Nay votes in the House. A final enrolled version of the bill was filed on May 7, 2019. (HB 527 by Rep. Byrd and Rep. Grall is the companion legislation.)

Police, Fire, and Search and Rescue Canines and Police Horses – SB 96

Sponsored by Sen. Bean, the bill increases the penalty for causing great bodily harm or death to a police, fire, or SAR dog or police horse to a second-degree felony, punishable by up to 15 years in prison and a $10,000 fine. The bill also expands the definitions of “police canine” and “SAR canine” to include any canine that is owned or used by a correctional agency. The Senate version unanimously passed both chambers and the Governor approved a final enrolled bill on April 26, 2019. (HB 67 by Rep. Byrd and Rep. Tomkow is the companion legislation.)

Lewd or Lascivious Exhibition – SB 828

Sponsored by Sen. Rader, the bill prohibits certain lewd or lascivious acts in presence of county correctional personnel, making it a third-degree felony to do so. SB 828 passed both chambers unanimously, and a final enrolled version of the bill was filed on April 30, 2019. (HB 599 by Rep. Gottlieb and Willhiite is the companion legislation.)

Mandatory Direct File – HB 6051

Sponsored by Reps. Driskell and Sirois, and its companion, SB 1260, sponsored by Sen. Wright, the bill completely removes statutory provisions that require mandatory direct filing of charges in adult court against juveniles under certain circumstances. To the extent the bill retains youths in the juvenile justice system rather than transferring them to the adult court process, the bill will decrease the number of jail and prison beds and increase costs to the Department of Juvenile Justice. This legislation was folded into committee bill Public Safety – HB 7125. HB 7125 passed both chambers and was ordered enrolled on May 3, 2019.

Detention Facilities – SB 204

Sponsored by Sen. Brandes, and its companion HB 1029, sponsored by Rep. Beltran, the bill prohibits the introduction into, or possession of, any cellular telephone or other portable communication device on the grounds of any county detention facility. This legislation was folded into committee bill Public Safety – HB 7125. HB 7125 passed both chambers and was ordered enrolled on May 3, 2019.

Public Safety – HB 7125

Sponsored by the House Judiciary Committee, Rep. Daniels, and Rep. Renner, the bill makes comprehensive changes to several provisions relating to Florida’s criminal justice system, courts, and public safety.

The bill does the following:

- Provides the Crime Stoppers Trust Fund reallocation authority and criminal penalties for the disclosure of certain privileged communications;
- Requires the Office of the State Courts Administrator to provide an annual report providing details about each problem-solving court for each fiscal year of operation;
- Provides that attorney’s fees may not be awarded in certain proceedings for injunction if the petitioner or respondent
provide false statements with regard to material matter in the petition or asserted defense, respectively;

• Allows a written agreement or order deferring child support payments to include a reasonable period of payment deferral to accommodate an obligor's good faith job seeking effort;

• Removes the percentage cap for certain goods provided by PRIDE Industries;

• Increases the threshold amounts of various theft offenses and requiring the Office of Program Policy Analysis and Government Accountability (OPPAGA) to review specified threshold amounts periodically and report its findings to the Governor, President of the Senate, and Speaker of the House of Representatives (Most notably, the threshold for grand theft and retail theft is lowered to $750.);

• Reduces lengths of time for various revocations and suspensions of a driver license;

• Limits the application of felony penalties for 3rd or subsequent violations of driving while license suspended or revoked to certain suspensions and providing all other 3rd or subsequent offenses are a first-degree misdemeanor with a mandatory minimum 10 days in jail;

• Requires each clerk of court to establish a Driver License Reinstatement Day Program to assist people seeking to have their driver license reinstated and allowing the clerks to waive certain fines and fees;

• Ensures the Sexually Violent Predator Program is considered to serve a criminal justice function to maintain its access to the National Crime Information Center database;

• Prohibits specified entities from considering convictions that have occurred more than five years from the date of a licensure or registration application from being a basis for denial of specified occupational licenses or registrations;

• Allows a veterinarian to report certain suspected criminal violations to the appropriate authorities without notice to the client;

• Provides a just cause defense for criminal offenses and disciplinary violations against a contractor for failure to do certain things within a specified amount of time and increasing the felony thresholds applicable to contractor fraud;

• Removes the mandatory minimum sentence for horse meat offenses;

• Ensures that a person released from a county detention facility following incarceration for an offense for which the sentence pronounced was a prison sentence qualifies as a prison releasee reoffender if otherwise eligible;

• Provides that cyberstalking includes accessing or attempting to access the online accounts or Internet-connected home electronic systems of another person without that person's permission, causing substantial emotional distress to that person, and serving no legitimate purpose;

• Specifies that a person who holds or held an active certification from the Criminal Justice Standards and Training Commission as a law enforcement or correctional officer meets the definition of "qualified law enforcement officer" found at 18 United States Code section 926(B) and (C), thereby authorizing such person to carry a concealed firearm in Florida in accordance with federal requirements;

• Prohibits lewd or lascivious exhibition in the presence of any person employed at or performing contractual work for a county detention facility;

• Amends the definition of "access," relating to computer crimes, to reference an electronic device, so access includes the unauthorized access of an electronic device;

• Provides for punishment of computer-related crimes when those crimes are committed willfully, knowingly, and without authorization or exceeding authorization;

• Adds an element of intent to defraud to the crime of possession of a counterfeit instrument;

• Reduces the criminal penalties for certain alcohol and gambling offenses;
- Increases the current threshold weight amounts for trafficking in hydrocodone;
- Modifies a number of definitions and data collection points necessary for efficient data collection in accordance with the Criminal Justice Data Transparency Act;
- Ensures that data collected in accordance with s. 900.05, F.S., maintains the necessary confidential and exempt status when such data is reported to the Florida Department of Law Enforcement (FDLE);
- Requires the FDLE to assist in developing specifications for a uniform arrest affidavit to assist with criminal justice data transparency;
- Reorganizes the various sealing and expunction statutes for clarity and creating an automatic sealing process for certain criminal history records of a minor or adult;
- Expands the offense of escape to include an inmate out on furlough;
- Enhances the Criminal Punishment Code ranking level for an employee who uses such position to introduce contraband into a state correctional facility;
- Authorizes the Department of Corrections (DOC) to increase the number of transition assistance specialists, requiring such specialists to inform inmates about relevant job credentialing or industry certifications, and expanding the use of such credentialing;
- Requires the DOC to create a toll-free hotline for released inmates to obtain information about community-based reentry services;
- Expands the use of the needs-based risk assessment system to provide inmates and offenders with community-specific reentry service provider referrals;
- Requires the DOC to provide inmates with a comprehensive community reentry resource directory that includes specified information related to services and portals available in the county to which the inmate is to be released;
- Permits specified entities to apply with the DOC to be registered to provide inmate reentry services and requiring the DOC to create a process for screening, approving, and registering such entities;
- Authorizes the DOC to contract with specified entities to assist veteran inmates in applying for veteran’s benefits upon release;
- Authorizes the DOC to develop, within its existing resources, a Prison Entrepreneurship Program that includes education with specified curriculum and authorizing the DOC to train inmates to become firefighters;
- Authorizes the court to order or the DOC to transfer offenders to administrative probation if the offender presents a low risk of harm to the community and has completed at least half of his or her term of probation;
- Requires a court to early terminate or transfer to administrative probation certain compliant probationers upon certain factors being met and providing for exceptions to such requirement;
- Codifies the DOC's current practice of using graduated incentives to promote compliance with probationers and offenders on community control who are on supervision with the DOC;
- Requires the court to modify or continue the supervision term of certain low-risk offenders with a first filed violation of probation and providing modification terms and exceptions;
- Requires each circuit to create an alternative sanctions program to handle specified types and occurrences of technical violations of probation or community control with the judge's concurrence;
- Allows each judicial circuit to establish a community court program for defendants charged with certain misdemeanor offenses and specifying program requirements;
- Adds cellular telephones to the list of items that are prohibited from being introduced into a county detention facility.
and applying criminal penalties for such offense;

- Permits a court to impose a sentence as a youthful offender if a person committed a felony before they turned 21 years of age;
- Increases the relevant timeframes in which a person who is eligible for financial compensation through the Department of Legal Affairs Crime Victim Services may apply for such compensation;
- Adds locally authorized entity to the list of entities that may operate an independent civil citation or similar prearrest diversion program in addition to a circuit program;
- Removes the requirement for the Department of Juvenile Justice to enter information related to a civil citation or prearrest diversion program into the Juvenile Justice Information System Prevention Web;
- Repeals all provisions related to transferring a child to adult court for prosecution pursuant to mandatory direct file;
- Creates the Criminal Punishment Code Task Force to evaluate various sentencing procedures and providing an appropriation for such Task Force; and
- Provides that a person who has completed all the terms of his or her sentence for a criminal conviction is eligible to be awarded certain scholarships and grants for higher education and vocational education if he or she meets all other requirements to be awarded the scholarship, grant, or other aid.

The bill passed the Legislature almost unanimously (only 1 Nay vote in the House) and was enrolled on May 13, 2019.

**Criminal Justice Bills That Did Not Pass**

Legislation included in this subsection are bills that did not pass through the Legislature and related to criminal justice and corrections. Included in this section are those bills regulating security in trial court facilities.

**Security in Trial Court Facilities — HB 639**

Sponsored by Rep. Perez, and **SB 762**, sponsored by Sen. Gruters, the bill would have required each sheriff to coordinate with specified entities to develop a comprehensive plan for security of trial court facilities. The bill also would have required each county sheriff to coordinate with the board of county commissioners and the chief judge of the judicial circuit to develop a comprehensive security plan for trial court facilities. The sheriff retains authority over the implementation and provision of law enforcement services under the plan. The chief judge retains decision-making authority to protect due process rights, such as in the scheduling and conduct of judicial proceedings. HB 639 passed the House floor, but **SB 762** was not heard in its last committee of reference.

**General Government Bills That Did Pass**

Legislation included in this subsection are bills that passed the Legislature and relate to regulations concerning General Government. Included in this section are bills regulating community redevelopment agencies (CRAs), financial reporting, government accountability, and attorneys’ fees for local ordinance challenges.

**Community Redevelopment Agencies — HB 9**

Sponsored by Rep. LaMarca, the bill has several provisions to increase the accountability and transparency of CRAs. The most troubling aspect of **HB 9** specifies that after October 1, 2019, a new CRA can only be created by a countywide referendum in a primary or general election and would require the approval of two-thirds of the electors’ votes to pass. The
bill outlines a process by which all CRAs will be terminated by 2039 unless reauthorized by the body that created the CRA by a
two-thirds vote. The bill passed the Senate with 1 Nay vote and passed the House with 30 Nay votes. The bill was enrolled on
May 2, 2019. (SB 1054 by Sen. Lee is the companion legislation.)

Government Accountability – SB 7014

Sponsored by the Senate Committee for Governmental Oversight and Accountability, the bill is primarily related to
educational institutions, specifying that either the Governor or Commissioner of Education may notify the Legislative
Auditing Committee of an entity’s failure to comply with certain auditing and financial reporting requirements. Governor
DeSantis approved the bill on April 26, 2019. (HB 7035 by the House Oversight, Transparency, and Public Management
Subcommittee is the companion legislation.)

Local Government Financial Reporting – HB 861

Sponsored by Rep. Roach, the bill requires counties and municipalities to post their annual budgets to their respective
websites for at least two years and tentative budgets to their websites for at least 45 days. Beginning October 15, 2019, the
bill requires each county and municipal budget officer to file an annual report to the Office of Economic and Demographic
Research (EDR), in a format and on forms prescribed by the EDR, including information concerning: government spending
and debt per resident; median income within the county or municipality; average county or municipal employee salary;
percent of the entity’s budget spent on salaries and benefits for the entity’s employees; and number of special taxing
districts that are located wholly or partially within the county or municipality. The bill requires the EDR to develop the format
and forms for reporting the information by July 15, 2019. The bill passed the Senate and House with 1 Nay vote in each
chamber. The bill was enrolled on May 6, 2019. (SB 1616 by Sen. Baxley is the companion legislation.)

Attorney Fees and Costs – HB 829

Sponsored by Rep. Sabatini, the bill provides for awards of attorney fees and costs and damages (to either party) in
successful civil actions challenging local ordinances as being preempted by the State Constitution or state law. However, the
bill provides for an “escape clause” from liability for the prevailing party’s attorney fees and costs. Upon receiving a written
claim that a current or proposed/noticed ordinance is expressly preempted, the local government must withdraw a proposed
ordinance within 30 days or repeal an adopted ordinance within 60 days. The bill does not apply to ordinances relating to
comprehensive planning and growth management, the Florida Building Code, and the Florida Fire Code. The bill passed the
Senate with 14 Nay votes and passed the House with 31 Nay votes. The bill was enrolled on May 2, 2019. (SB 1140 by Sen.
Hutson is the companion legislation.)

General Government Bills That Did Not Pass

Legislation included in this subsection are bills that did not pass the Legislature and relate to General Government
regulations and powers. Included among these are bills concerning public-private film industry partnerships, preemption of
local government regulations, regional rural development grants, and private property rights.

Film and Television Production – SB 1808

Sponsored by Sen. Taddeo, this bill would have encouraged the collaboration of public sector and private sector efforts
through the development of programs and partnerships, and encourages the Florida Office of Film and Entertainment’s
continued support of various collaborative programs and partnerships for national and international marketing. SB 1808
passed two of its three readings, but no House version of the bill was ever filed.

**Entertainment Industry – SB 526**

Sponsored by Sen. Gruters, and **HB 1401**, sponsored by Rep. Buchanan, this bill would have created the Film, Television, and Digital Media Targeted Grant Program within the Department of Economic Opportunity under the supervision of the Commissioner of Film and Entertainment. The bill also set criteria for film, television, and digital media projects being produced in this to qualify for a grant. Finally, the bill would have created the Grant Advisory Board within the Office of Film and Entertainment of the department and provided membership requirements for the board. Neither bill made it past the committee stage.

**Governmental Powers – HB 1299**

Sponsored by Rep. Roach, this bill was a vehicle for multiple types of local government preemptions. The bill would have prohibited a municipality from purchasing or annexing real property within another municipality’s jurisdictional boundaries without the other municipality’s consent. The bill also would have prohibited a municipality from levying or collecting any excise taxes on cigars, nicotine products, and dispensing devices, in addition to the current prohibition on levying excise taxes on cigarettes. The legislation would have prohibited local governments from imposing additional requirements for maximum fuel supply or safe temperature and cooling for nursing homes and assisted living communities relating to their comprehensive emergency management plans. The bill would have provided for safe temperature and cooling requirements for assisted living facilities. The bill also clarified that provisions extending the expiration date of certain permits and other authorizations during a state of emergency by the Governor only apply during a “natural” state of emergency.

Finally, bill would have expressly preempted to the state:

- The regulation of single-use plastic straws to include restrictions placed on a food service regarding the distribution of single-use plastic straws.
- The regulation of over-the-counter proprietary drugs and cosmetics.
- The establishment of requirements for alternate generated power sources, including transfer switches related to motor fuel dispensing facilities.
- The establishment of the minimum age for the sale, purchase, or delivery of tobacco products, nicotine products, and nicotine dispensing devices, and the marketing of such products and devices. In conjunction, training requirements for employees relating to dealing in tobacco products would have been expanded to include nicotine products and nicotine dispensing devices.

**HB 1299** passed the House on April 29, 2019 but remained without a viable Senate companion. The bill was not heard in any of its Senate committees of reference.

**Local Government Fiscal Transparency – SB 1350**

Sponsored by Sen. Hutson, and **HB 15**, sponsored by Rep. Burton, this bill would have required local governments to expend added resources to comply with the mandates to provide expanded access to public records and financials, conduct additional public meetings and notices, debt affordability analysis, and reporting requirements. The House bill passed the House on April 11, 2019, but the Senate bill was not heard in any Senate committee.
Preemption of Local Regulations – HB 3

Sponsored by Rep. M Grant, and SB 1748, sponsored by Sen. Perry, this bill would have expressly preempted the regulation and licensing of occupations and professions to the state and prohibit the enforcement of any regulation of a business unless the regulation is expressly authorized by general law. The bill also prohibited local governments from taking actions affecting business after July 1, 2019, unless the local government has made public findings that the action is necessary to protect public health, safety and welfare; the action is performed in a manner that does not unnecessarily restrict entry into the business; and the action is performed in the least restrictive and cost-effective manner. The House version passed all committees of reference, but the Senate version did not pass out of its first reference committee.

Regional Rural Development Grants – SB 596

Sponsored by Sen. Albritton, and HB 671, sponsored by Rep. Clemons, the bill would have increased the annual grant awards for regional economic development organizations, defined in the bill to be those economic organizations located within a designated rural area of opportunity. It would have also reduced the local match requirement. Sen. Albritton’s bill passed out of the Senate, but the House bill died in the House Transportation and Tourism Appropriations Subcommittee.

State Funding, Cost Shift, and Unfunded Mandates – SB 70

Sponsored by Sen. Mayfield, and HB 1103, sponsored by Rep. Plasencia, this bill would have exempted the State Housing Trust Fund and the Local Government Housing Trust Fund from a provision authorizing the Legislature, to transfer unappropriated cash balances from specified trust funds to the Budget Stabilization Fund and the General Revenue Fund in the annual General Appropriations Act (GAA). Neither bill passed out of its first committee of reference.

Private Property Rights Protection – HB 1383

Sponsored by Rep. J. Grant, and SB 1720, sponsored by Sen. Lee, this bill would have revised notice of claim requirements for property owners and procedures for determination of compensation. The bill also would have required that certain settlements of claims apply to all similarly situated residential properties within political subdivision under certain circumstances. Furthermore, the bill would have authorized property owners to bring claims against governmental entities in certain circumstances and provides that property owners are not required to submit formal development applications or proceed through formal application processes to bring such claims. The House version passed all committees of reference, but the Senate version did not pass out of its first committee of reference.

Public Lodging Establishments (Vacation Rentals) – HB 987

Sponsored by Rep. J. Grant, and its companion SB 824, sponsored by Sen. Diaz, this bill would have preempted regulation (inspection, licensing, occupancy limits) of short-term rentals to the State and would have required local ordinances to apply uniformly to all residential properties. Additionally, the bills would have removed the current law allowing for more stringent regulations in “grandfathered” local governments. The House version of the bill made it to second reading, but the Senate version failed to pass its first committee of reference.
Response to Request for Proposals Number 2020-002-HB
for Lobbyist Services

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EXECUTIVE SUMMARY

Lena Juarez, the founder of JEJ & Associates, is what can best be described as an information navigator working on behalf of her clients. Ms. Juarez’s task is to provide an understanding of the political process to her clients, plot a course through the maze of the legislative process and political landscape, convince decision makers of the worthiness of client priorities, and effectively deliver success. This provides you a blueprint for what to expect at both the local and state level of government, in which she has over thirty years of experience.

Ms. Juarez’s background includes a master’s degree in public administration and policy and more than two decades as a governmental consultant. She worked with her father’s political consulting firm to learn and hone her lobbying skills and subsequently formed her own firm. JEJ & Associates is one of the most respected firms in Tallahassee and Ms. Juarez is known for her relentless pursuit and dedication to delivering successful results for clients. She has been applying her trade in Tallahassee and throughout the state for twenty-one years as the leader of JEJ & Associates.

JEJ & Associates has a dedicated team of professionals who share her principles. Ms. Juarez recognizes that to effectively represent the Village of Indiantown, local knowledge is necessary. For this reason, she has added James Anaston-Karas to the Indiantown team. Mr. Anaston-Karas has worked for over ten years with Martin County as a consultant developing strategic plans. He will serve as the local contact for the team and, as indicated, be a key component to the overall JEJ & Associates team. Information on all of our Indiantown team members is provided in later sections.

Throughout its history, JEJ & Associates has been working with local governments to secure funding, maintain home rule, seek alternative funding sources, and pass favorable legislation. Local governments with which we have worked include the City of St. Augustine, Leon County, the City of St. Petersburg, Broward County, Orange County, the City of Pembroke Park, the City of Orlando, Hillsborough County as well as the South Florida Water Management District and the Central Florida Regional Transportation Authority.

The balance of our response outlines our past work and successes. All lobbyists can demonstrate specific accomplishments. While that is vitally important and needs to be considered, there is more to discovering a good and future successful fit. The JEJ & Associates team cares about our clients. While we have the decades of experience, we retain the enthusiasm for our work, the desire to not take no for an answer, the drive to explore all possibilities, the willingness to go the extra mile because it is the right thing to do, to care about the outcomes we help facilitate, and the enjoyment in the knowledge that what we have done has made an impact with our client. What sets us apart is that we are just like you, the Council and staff of the Village of Indiantown. We will not be a part of your team; we will join with you to be THE Indiantown team.
QUESTIONNAIRE
JEJ & Associates

January 23, 2020

Village of Indiantown Council
16550 SW Warfield Boulevard
Indiantown, Florida 34956

Dear Mayor Stone, Vice Mayor Hernández and Council Members Dowling, Clarke and Thomas:

JEJ & Associates is pleased to submit this proposal in response to the Village of Indiantown Request for Proposals, Lobbyist Services (#2020-002-HB). Our experienced team of professionals looks forward to developing a strong working relationship with the Village to bolster your relationship with other governmental agencies, remain attentive to your multicultural community, and ultimately bring legislative and appropriations wins to Florida’s newest municipality.

The JEJ & Associates team is the most qualified to deliver outstanding lobbying services because:

- Our reputation is built upon individual achievement of our consultants, and hard work of the team to benefit our clients. Our success can be traced to a dedication in seeing goals realized, a commitment to provide individualized service to clients, responsiveness to the client, an ability to think outside the box, and continuous efforts to track the pulse of Florida politics. A sampling of our Team’s client list (contract or sub-contract), is testimony to our talent and commitment: City of St. Augustine, Leon County, the City of St. Petersburg, Broward County, Orange County, the Central Florida Regional Transportation Authority, the City of Pembroke Park, Hillsborough County, the City of Orlando, the Orlando International Airport and the South Florida Water Management District.

- As a full-service consulting firm with offices in Tallahassee and Orlando, we successfully serve a wide range of clients, including local governments. To meet your needs, we will partner with veteran South Florida consultant James Anaston-Karas whose decades-long career includes 12+ years of state legislative and lobbying, regional government management as a Regional Planning Council appointee and Water Management District employee, and 12+ years of local Indiantown and Martin County experience. Our proposal includes a diverse set of current and past clients, each of whom have contributed to our knowledge and ability to tackle all aspects of the Village’s legislative priorities. An acknowledgement of our successes is demonstrated in that most of our clients have remained with JEJ & Associates for many years.

- Under the leadership of Lena Juarez, our team collectively has over 90 years of achieving results for our clients. By managing both the number and type of clients, we eliminate conflicts of interest. While many firms may have up to dozens of clients with competing goals, JEJ & Associates pledges to honor full disclosure and no conflicts of interest. We will seek like-minded groups to join in our efforts. For example, for over 20 years we have worked with the Florida
League of Cities and the Florida Association of Counties on client’s issues, especially regarding home rule. JEJ & Associates is currently and for the past three years has been lobbying with a coalition of cities coordinated by the League against state preemption of local government rights regarding vacation rentals.

- Many local governments seek funding for infrastructure projects. Each year there are hundreds of millions of such requests; but only a limited amount of funding (the Fiscal Year 2019-2020 total was $49,082,803). Lena Juarez has been very successful in securing these project funds. For example, she has secured water project funds for the City of St. Augustine for the past two fiscal years and is working on several project requests for the upcoming fiscal year. She, along with our team addition, James Anaston-Karas, have years of experience working with the state water management districts.

- Central to the Village’s strategic focus is economic development that will expand taxable value and base. Though Indiantown’s Enterprise Zone program has sunset along with state law, the existing economic/tax incentive tools you now have in place should be aggressively applied, protected, and marketed. The JEJ Team is well-versed in economic development programs and will be an advocate and resource in this regard.

- We understand the drivers of the regional and local economy, especially the role of agriculture and tourism. Ms. Juarez has served as the executive director of the Florida Agritourism Association for many years. She has extensive knowledge of the significance of agriculture to our state’s economy, the needs of the industry, and the challenges faced by farmers.

Taken together, these attributes ensure that JEJ & Associates not only will meet the requirements of the Village, but exceed its expectations. We encourage you to review the balance of this response with particular emphasis on our success examples. Please be aware that these represent a cross section of our work and are not intended to reflect all of our areas of expertise.

We acknowledge that we have read and will comply with all the terms and conditions of the RFP. The authorized person for JEJ & Associates, Inc., a Florida corporation, is as follows.

Lena Juarez, President
JEJ & Associates
Post Office Box 10390
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Please do not hesitate to contact me with any questions you may have concerning our proposal.

Sincerely,

Lena Juarez
Lena Juarez
President
QUALIFICATIONS AND EXPERIENCE OF FIRM

Introduction

JEJ & Associates is a Florida governmental relations consulting firm founded by its sole owner Lena Juarez. JEJ & Associates has been delivering results for clients, including numerous local governments, for twenty-one years. The firm is certified as a Minority Business with the State of Florida. We have extensive experience working with the Florida Legislature, Cabinet and Executive Branch and are confident that we will provide unmatched professional services on behalf of the Village of Indiantown (“Indiantown”) in Tallahassee. In addition, we have worked at the local government level on client’s behalf. Since its inception in 1999, JEJ & Associates has represented clients in the areas of transportation, local government, the judiciary, finance and tax, economic development, health care, education, regulated industries, real estate development, environment and agriculture.

The firm has staffed offices in Tallahassee and Orlando, while our partner is located in Stuart, allowing JEJ & Associates to quickly respond to Indiantown wherever representation is required at the local or state level. During legislative committee weeks, and the corresponding session, our team is working in Tallahassee to accomplish our clients’ legislative priorities, all the while maintaining an eye on local issues. During the balance of the year, we stay in contact with our clients to maintain two-way communication about legislative and political developments and focus on issues relating to local and regional matters. It is during this period that we work with clients to develop priorities and establish a plan for advancing those goals. We also meet with legislators, legislative staff, committee staff, pertinent executive branch departments, and other relevant stakeholders on a regular basis to ensure we are aware of significant events.

In addition to state legislative action, JEJ & Associates recognizes that Indiantown is seeking representation before Martin County as part of our services. To effectively address with this responsibility, we have added a Martin County resident, James Anaston-Karas. He has extensive experience, not just with state government, but also with Martin County government and the South Florida Water Management District. With a master’s degree in city and regional planning he will be able to “talk the talk and walk the walk” with Martin County government as we work on Indiantown’s local priorities.

JEJ & Associates Credentials

JEJ & Associates, under the leadership of its President Lena Juarez has assembled a team of professionals who thoroughly understand local government issues. We bring forward decades of experience working those concerns for counties and municipalities. The team has a unique perspective because of our wide-ranging backgrounds and experience representing a diverse set of clients in both the public and private sector. JEJ & Associates has proved itself to be an effective advocate for its clients, and has earned a well-deserved reputation in Tallahassee for providing superior personalized services.
Our firm recognizes that to be successful in the legislative arena we cannot rely exclusively upon our relationships with legislative leadership only. It is through years of dedicated hard work that has allowed us to develop relationships with legislators throughout the state, including members on both sides of the aisle. It is through these connections that we will accomplish the Village’s legislative platform. JEJ & Associates will further discuss its legislative, Cabinet and executive branch relationships later in this section.

Lena Juarez and the JEJ & Associates team, has represented local governments, beginning with Orange and Hillsborough counties, since 1999. Ms. Juarez was selected as the lead consultant for several cities, including the City of St. Augustine since 2014, and the City of Pembroke Park. She has also served, beginning in 2002, as the Central Florida Regional Transportation Authority’s, d.b.a. LYNX, sole or lead consultant.

Other groups with whom we have developed ongoing relationships include the Florida Association of Counties, the Florida League of Cities, the Florida Metropolitan Planning Organization Advisory Council, local metropolitan planning organizations, and several counties including Duval, Leon, Hillsborough, Polk, Orange, Seminole, Osceola and Miami-Dade. All of these contacts have contributed to our understanding of local governmental priorities and challenges.

JEJ & Associates will be an excellent partner with Indiantown because we know and understand the political and governmental landscape of the State of Florida, and we will bring our lobbying experience and understanding of the legislative process to get results. We are the team with statewide connections and local government experience.

“Lena Juarez is a true advocate for our organization. She is experienced and skilled at advancing our interests. She is respected by those she seeks to influence and by those within our organization. She passionately advocates on our behalf but always does so with honor and kindness. We are a better and more effective organization because of our association with Lena Juarez.”

Steve Seibert  
Executive Director, Florida Humanities Council
Martin County

While JEJ & Associates’ work primarily involves legislative consulting, the firm also has experience representing local governments on behalf of clients. Team members have worked with private developers, contractors, land owners and companies on projects including rezoning, procurement issues, incentives and variances, among others.

Lena Juarez has many connections with South Florida local governments and leaders. To bolster the impact of JEJ & Associates on behalf of the Village, Ms. Juarez has enlisted a long-standing colleague to join the team. With over thirty years of accomplishments in local, regional and state government advocacy and grants James Anaston-Karas is not just a welcome addition to the team. Rather, he will be a key member moving forward working with local and regional governments and entities that potentially may help Indiantown as it moves forward.

Dedicated Time

Lobbying is about maximizing opportunities as they show themselves. JEJ & Associates develops a master list of all client priorities and ensures that each member of the team is knowledgeable about them. We research our clients to know where opportunities may lie and offer recommendations or showcase possibilities. For example, Indiantown is a small community that relies on agriculture as an economic engine. Diversification of the Village’s economy is a goal for the community. JEJ & Associates, while working daily on clients’ behalf, will always be on the lookout for opportunities through grants or other governmental programs that may prove beneficial. Oftentimes, what helps one client, will help another. We may uncover a grant that the Village is unaware, but would be eligible while talking with a legislator while riding an elevator, visiting with a staff member at the Capitol cafeteria, or while seeking shelter from a spring shower. We never know. That is why legislative work is ongoing throughout the year, without certain hours.

JEJ & Associates will work hard on behalf of Indiantown for your success; putting in the time required to achieve victories.

Successful Past Performance/Experience

Overview

JEJ & Associates’ experience with local governments extends to appropriations; the securing of bill sponsors in both chambers; researching and analyzing bills; writing and analyzing amendments and rules and regulations; advocating for clients’ priorities; testifying in committees on behalf of the client; scheduling meeting with key governmental decision-makers; developing talking points; outlining legislative priorities; following the rule development process; and organizing client advocacy days at the Capitol; among other tasks.

Often times, in addition to seeking legislation, Indiantown will need to advocate against pending bills and/or amendments. Ms. Juarez has worked with Senators and
Representatives to pass legislation as well as to defeat unwanted legislation on behalf of clients. Two recent examples include (1) passage of a bill making it a misdemeanor for trespassing on airport properties, and (2) defeat of vacation rental bills which would inhibit local governments from controlling what occurs within their jurisdictions.

JEJ & Associates has worked on rule development for clients such as LYNX when it needed to clarify a rule regarding its ability to issue bonds without State approval under certain conditions. She also worked with fire chiefs throughout the state to develop rules governing fire code regulations for non-residential farm buildings.

JEJ & Associates also has experience organizing advocacy days for clients. For over a decade, one health care client annually came to the Capitol to share its priorities, meeting with close to 70 members of the Senate and House in one day. Ms. Juarez has also coordinated lunches, dinners and key meetings with members of the Legislature that might influence a client’s issue or issues. The Village may wish for JEJ & Associates to help organize its day or a series of meetings with legislative leadership to discuss priorities.
Specific Examples of Legislative Successes

JEJ & Associates has a wide range of successes within the local government realm. We have accomplishments in a wide range of areas for local government, including, but not limited to, transportation, finance and tax, appropriations, trust funds grants, and growth management. We have sought solutions legislatively, administratively, and directly through executive agencies.

Outlined below are issues we have addressed with successful results.

✓ The Central Florida Regional Transportation Authority pursued a dedicated funding source. With the support of MetroPlan Orlando, JEJ & Associates worked to pass a $2 rental car surcharge. The Republican majority in both chambers discouraged the passage of any legislation that appeared to be a tax. Ms. Juarez lobbied committee chairs, legislative leaders and the Central Florida delegation members. Just before the end of the session, the bill passed both chambers and was sent to the Governor. Former Governor Jeb Bush vetoed the bill on philosophical principles. This issue proved to be the stand-out legislation of the session as few believed such an outcome was possible within the anti-tax stance of the Legislature.

✓ We recognize that the legislative process oftentimes moves slowly, sometimes taking several sessions to garner successful results. JEJ & Associates has repeatedly worked over several sessions to achieve results for clients. One critical achievement was the passage of legislation which amended the statute governing the Charter County Transportation Surtax, now called the Charter County and Regional Transportation System Surtax. The change allowed all charter counties to utilize this funding mechanism, via referendum. JEJ & Associates’ strategy was to cultivate legislative sponsors in each of the chambers, while simultaneously working with other groups, such as Polk County, to develop a coalition of supporters. After securing sponsors, Ms. Juarez worked with legislators to explain the priority and its importance for transit agencies. JEJ & Associates developed written materials, coordinated testimony before legislative committees and monitored opponents’ activities for parliamentary maneuvers which could affect the outcome. This legislative change was approved and became law. Currently four counties (Broward, Duval, Hillsborough and Miami-Dade) are the only ones collecting this additional revenue. Twenty-six other counties are eligible to approve the surtax.

✓ Appropriations remain an important aspect of local governmental priorities. During the 2018 and 2019 Sessions, JEJ & Associates represented the City of St. Augustine and Leon County. This past session the City of St. Augustine was requesting funding for two water projects. JEJ & Associates secured the necessary House sponsors for these requests (the House of Representatives changed their rules and now require that all appropriations projects have a bill sponsor for a request to be considered) and lobbied the Appropriations Committee chair as well as the Subcommittee chair in both chambers. Ms. Juarez was successful in securing funding for one of the projects in a year in which water project funding was
significantly reduced (the funding for the entire State was only $30,123,311). JEJ & Associates was also successful in securing funding for a 2018 water project.

Meanwhile, Leon County was seeking funding for nine non-educational projects that together totaled $8,828,244. The requested projects included trail development funding, work entry programs, homeless services and a boys’ choir, among others. The team secured the necessary sponsors, advocated for their inclusion and were successful in funding five of the projects totaling $5,978,544.

✓ On many occasions, we assisted our clients by monitoring legislation. For example, we informed the transit organization LYNX about the Renewable Energy Grant Program, which LYNX successfully applied and received funding for a biodiesel blender to fuel converted buses. Another instance involved the Road Rangers program. While monitoring the budget process, we noticed that funding for the Rangers program disappeared in the committee process. Alerting LYNX to the omission, Ms. Juarez worked with staff to restore the $11 million appropriation.

✓ Issue advocacy is also an area of local government concern. For the past couple of sessions, the House has led efforts to bring short term vacation rentals under State jurisdiction. Ms. Juarez joined forces with a group of like-minded lobbyists representing local governments throughout the state to defeat these multi-year efforts. Advocating persistently throughout the session, we were able to ensure that the measure did not pass for the past four years.

✓ JEJ & Associates has experience in shepherding a local priority through the entire process. For example, the Orlando Sanford International Airport was experiencing a problem with multitudes of birds which interfered with airline traffic due to the inherent dangers of bird strikes. Ms. Juarez initiated discussions with local legislators, worked with committee staff to write the bill, found sponsors in both chambers, educated legislators on the issue, worked with committee chairs to ensure that the bill would be heard in the referenced committees, visited legislators prior to the bill reaching the chamber floors, and pushed for the governor to sign the bill into law once it was passed. As a result of this, the Airline Safety and Wildlife Protection Act became Florida law and has since served as model legislation for other states on how to deal with the issue.

✓ Our firm has successfully organized “legislative days at the capitol” for several of our clients. These can prove beneficial as it increases the visibility of the client with legislative leaders. Some of our clients who has benefited from our organizational abilities include the Central Florida Regional Transportation Authority, Molina Healthcare, and the Florida Association of Community Transportation Systems.

✓ JEJ & Associates had significant and far reaching successes while working on behalf of the Florida Conference of Circuit Court Judges. Florida voters approved a constitutional amendment which changed funding for trial courts from individual counties to the State. Oftentimes, when constitutional amendments are passed there are differences among stake holders as to the correct interpretation of the
amendment’s intent. Ms. Juarez worked diligently with the Conference and the counties to develop a formula which provided equitable state funding to all 67 counties. This is an example of how JEJ & Associates works beyond the standard definition of lobbyist to benefit its clients.

✓ Lobbying on behalf of clients is not restricted to the legislative branch of government. Oftentimes JEJ & Associates most successful work involves working with executive branch agencies to develop rules and regulations that are favorable to our clients. In 2017, the courts established a trust as part of the Volkswagen settlement to distribute funding to all the states to mitigate diesel pollution. Florida’s share is $166 million. JEJ & Associates worked on behalf of ChargePoint, an international electric vehicle (EV) charging station company, for two years to ensure that the Florida Department of Environmental Protection recommended that the maximum 15% of these funds be directed towards EV charging infrastructure installation. These efforts proved successful when, in July 2019, the Department made such a recommendation in their final plan. Applications for projects can now be made, most of which will likely come from local governments.
SUMMARY OF WHY JEJ & ASSOCIATES

JEJ & Associates is a boutique lobbying firm by choice. Some may consider a small firm to be a disadvantage. Nothing could be further from the truth concerning our twenty years of experience with the Florida Legislature, Cabinet and Executive Branch. We highlight the following credentials:

→ Our team are professionals in our field, providing expertise in legislative strategy.
→ Responsiveness to clients is our single most important firm trademark. Our clients know that when they call – we will answer; when they make a request – we will respond; when they need something – it will be done on a more than timely basis; and when they are looking for success – we will provide it.
→ Our firm has longevity in Tallahassee. We have success stories covering two decades that span multiple administrations and hundreds of legislators, which demonstrates our ability to develop and maintain relationships.
→ Our local professional has worked for and with Martin County government, local not-for-profits and property owners in and around the Indiantown vicinity since 2005.
→ JEJ & Associates has relationships on both sides of the political aisle, which gives us the maximum flexibility in negotiations that legislation often demands.
→ We conduct frank and honest conversations. We will always analyze both sides of every strategy, exploring both the advantages and pitfalls we may see.
→ The legislative process seemingly works at warp speed. There is more information available during session than ever before. JEJ & Associates knows where to look for that information and knows what to do with it once we have it.
→ Our team has the tools to provide real time analysis of issues and status of legislation. Our subscription to an on-line bill and news tracking system provides us real time results and background information.
→ A client’s time should be devoted where it may best be used, in providing technical advice and direction in policy. It is up to JEJ & Associates to execute and achieve priorities.
→ Our team’s Central and South Florida roots gives it an advantage in quickly understanding the nuances of the region’s economic and political developments, and how they fit in the context of statewide politics.
→ Lena Juarez does not like standing on the sidelines. She demands of herself, and of the other team members, that we all consistently work towards finding solutions to problems.
→ JEJ & Associates will be the Village’s local connection with Tallahassee experience.
QUALIFICATIONS OF PROJECT TEAM

Proposed Project Manager and Project Leaders

Lena Juarez, an Orlando native, is the president and founder of JEJ & Associates and will serve as the firm’s lead lobbyist and principal liaison to the Village of Indiantown. Prior to establishing her own firm, she worked with Juarez & Associates, an Orlando consulting firm founded by her father, Oscar Juarez, in 1979. It was under his mentorship that she polished her skills and developed the ethic under which she has become one of the most respected and successful Tallahassee consultants. Another mentor to Ms. Juarez is Lieutenant Governor Toni Jennings, the former, and only, two-time Senate President. Governor Jennings is a lifelong friend who possesses unmatched knowledge of Florida government and who can rightly provide guidance when necessary on behalf of clients. Ms. Juarez is a member of the Florida Association of Professional Lobbyists and is registered by the State of Florida as a minority business owner (see attached State of Florida Certificate). Robert Miller, who prior to joining JEJ & Associates in 2003, had over twenty years of consulting work, will also be working on behalf of the Village. He is also a Central Florida native familiar with the business community and local government developments. Each of us has consulted and assisted candidates running for local offices, including city and county commissions, property appraiser, tax collector, sheriff, clerk of the courts, and state legislators.

James Anaston-Karas will be a member of JEJ & Associates’ Indiantown team. With over thirty years of experience working for and with state and local governments Mr. Anaston-Karas brings vast institutional knowledge and the savviness to successfully navigate government on behalf of the Village. He served eight years as the policy manager for the Florida House Speaker, five years as the legislative manager for Broward County, and has consulted as a community/business developer. Having completed projects for Martin County, and having studied the County as a planner, Mr. Anaston-Karas has the necessary background to immediately impact Indiantown.

The JEJ Team is familiar with legislative, regulatory, rule-making and appropriation aspects of local government laws, policies and related issues in Florida. We invite you to visit our website, www.jejassociates.com, for further information about the firm and its story. Combined, our JEJ team has been involved in Florida politics for over eight decades, and has the knowledge, personal relationships and acumen to produce results for our clients.

JEJ & Associates is committed to providing the highest quality lobbying service to our clients. Our firm and its mission are concerned with individualized attention to those we serve. Personal service means that our principal, Ms. Juarez, will be available, and will always promptly respond to client needs and requests. Dedication yields results.
LENA JUAREZ

Lena Juarez, founder of JEJ & Associates, has delivered results since 1997 for a diverse set of clients, ranging from Fortune 500 companies, to local governments, to trade associations, and to not-for-profit groups. She has built a successful government consulting practice through her tenacity, ability to collaborate and strategically solve problems on behalf of her clients.

By truly understanding her clients’ needs and communicating them successfully to the right decision-makers, Ms. Juarez develops strategies to obtain both funding and policy changes her clients need to achieve their goals.

Since its inception, JEJ & Associates has represented clients in the areas of healthcare, education transportation and economic development, regulated industries, agriculture, finance and tax, the judiciary, and local government. Ms. Juarez has also secured millions of dollars for clients through the annual state appropriations process.

A graduate of Sophie Newcomb Memorial College of Tulane University and the Reubin O’D. Askew School of Public Administration and Policy at the Florida State University, she has been active in politics since a very young age and has served on many local and statewide boards. Ms. Juarez has been appointed to numerous statewide boards by current and former Senate Presidents and House Speakers. She is a graduate of Leadership Tallahassee and Leadership Florida, which are programs of the local and state Chamber of Commerce. She is a member of the Florida Association of Professional Lobbyists.
LENA JUAREZ

845 Circle Drive, Tallahassee, FL 32301    |    850-212-8330    |    Email: Lena@JEJAssoc.com

GOVERNMENT AFFAIRS EXPERT AND LOBBYIST
Government Consulting | Government Relations | Political Consulting

CORE COMPETENCIES AND STRENGTHS

- Persuasive Influencer
- Securing Appropriations
- Public Relations
- Funds Development
- Coalition-Builder
- Grassroots Advocacy
- Public Speaking
- Strategic Planning
- Strong Negotiator

PROFESSIONAL EXPERIENCE

JEJ & Associates, Inc., Tallahassee and Orlando, Florida

President
February 1999 - Present

Founder of a full-service governmental relations consulting firm with offices in Tallahassee and Orlando, Florida, working with Fortune 500 companies, local government entities, not-for-profit groups, trade associations and small businesses

- Collaborate closely with clients to create and implement aggressive action plans to obtain funding and/or policy changes
- Develop and implement creative strategic planning processes for clients to ensure alignment of government relations strategy with desired business goals
- Represent clients in areas of economic development, transit, transportation, local government, regulated industries, the judiciary, agriculture, healthcare, finance and tax, natural resources and education
- Secured millions of dollars for clients through the state appropriations process
- Track, analyze and interpret proposed legislation and regulations, including state budget
- Monitor and analyze legislative, administrative, regulatory and political activity to assess potential impacts
- Actively lobby the State Legislature on behalf of client’s interests to achieve funding and/or policy changes
- Developed strong network of key relationships in Florida government by addressing client regulatory and business issues

Key Highlights:
- Secured over $20 million in funding for the Orlando Sanford International Airport 4 years in a row
- Secured over $5.3 million in new funding for municipal projects throughout the State of Florida
- Inserted an annual $5 million budgetary allocation to benefit transportation disadvantaged riders beginning in 2009
- Worked with legislators to pass historic legislation impacting the telecommunications industry
- Worked with healthcare lobbyists to pass legislation privatizing Florida’s $22 billion Medicaid program

Juarez & Associates, Orlando, Florida

Vice President
1997 - Present

- Represent clients as a member of full-service governmental and political consulting firm
- Coordinated local and statewide campaigns for Mayor of Orange County, Central Florida County and City Commissioners, and Florida Chief Financial Officer

Florida Board of Regents, Tallahassee Florida

Coordinator of External Affairs, Office of the Executive Vice Chancellor
1996 - 1999

- Served as the ombudsperson to the 10 State universities in Florida
• Wrote academic affairs program reviews for pending degree offerings at the public universities in Florida

**Florida’s Office of Collegiate Volunteerism**, Tallahassee, Florida 1992 - 1996

*Executive Director (1994-1996)*

*Assistant Director (1992-1994)*

• Managed only state-funded resource center for collegiate community service in the nation
• Oversaw all office operations including financial allocations of budget as well as hiring, training and evaluation of all employees
• Managed grants program and wrote grants seeking funding from foundations and federal government
• Traveled the state giving speeches and training for groups interested in starting community service projects

**EDUCATION**

**Florida State University**
**Askew School of Public Administration and Policy**, Tallahassee, FL
Master of Public Administration, 1995

**Tulane University, Newcomb College**, New Orleans, LA
Bachelor of Arts, History and Spanish, 1991

**University of Madrid, Complutense and Universidades Reunidas**
Tulane/Newcomb Junior Year Abroad Program, Madrid Spain, 1989-1990

**PROFESSIONAL AFFILIATIONS**

• Friends of the Museum of Florida History, Board of Directors, 2011 – present. Immediate Past Chair
• Leadership Florida, Board of Directors, 2008-2009; Graduate of Class XXV; Program Chair of Class XXVII
• Leadership Tallahassee, Class 17 graduate, 1999-2000; coordinated Government Day for 4 consecutive years
• Catholic Charities of Northwest Florida, Board of Directors 2002-2009, Chair 2007-08
• Oasis Center for Women & Girls, Founding Member; Board Member 2016-present, Secretary, Vice Chair
• Tallahassee Entrepreneurs Organization
• Capitol City Tiger Bay Club
ROBERT MILLER

Robert Miller joined JEJ & Associates in 2003 and is currently vice president. With over thirty-six years of governmental and political experience, he has represented a wide range of clients before local governments and the Florida Legislature. His expertise is in municipal and legislative issues, as well as working with regulatory agencies.

As part of the JEJ & Associates team, Mr. Miller has worked with city and county commissioners, state legislators, local and state agency staff to develop multi-level solutions for client priorities in the areas of public transportation, transportation disadvantaged, fiscal advocacy, growth management, and environmental issues.

In addition to governmental consulting he has extensive experience in writing reports, developing advocacy materials for clients, writing newsletters, and designing multimedia presentations. As a client representative Mr. Miller has appeared before numerous boards and committees to present advocacy testimony for his clients.

A Central Florida native, Robert has served on several statewide and local community boards including the Florida Task Force on the Availability and Affordability of Long-Term Health Care, and the Orlando FIRST Regional Committee. In addition, he is regularly engaged in political campaigns at the federal, state and local levels.

Robert is a graduate of the University of Florida, with degrees in political science and history, and earned a master’s degree from Georgetown University’s Institute of Comparative Political and Economic Systems.
ROBERT P. MILLER

105 East Robinson Street, Suite 300, Orlando, FL 32801    |    407-257-1749    |    Email: robert@jejassoc.com

GOVERNMENT AFFAIRS LOBBYST
Government Consulting | Grant Writing | Researcher

CORE COMPETENCIES AND STRENGTHS

Researching
Proactive Problem Solving
Public Relations

Effective Writer
Technology
Strong Communicator

Public Speaking
Strategic Planning
Collaboration

PROFESSIONAL EXPERIENCE

JEJ & Associates, Inc., Tallahassee, Florida    2003 - Present

Vice President

After eighteen years of political experience involving consulting, campaigns and business, I joined JEJ & Associates, Inc. as its Vice President responsible for lobbying, research, grant and appropriations writing, and running the firm’s Central Florida office.

• Monitor legislative actions on behalf of clients to determine effects of proposed bills, amendments and regulations
• Develop information cut sheets outlining client issues and proposed solutions
• Researched issues related to legislative bills and amendments and prepared wording for such bills and amendments
• Organize legislative advocacy days at the Capitol for clients
• Tracked and analyzed the state budgetary process, including monitoring client appropriations and proviso language effecting clients
• Make presentations before governmental bodies on behalf of various clients

Key Highlights:
• Worked with local governments to implement the Property Assessed Clean Energy Program (PACE)
• Served on a state board assessing Nursing Homes and Long-Term Care facilities. Made recommendations for statewide program changes.
• Worked extensively as part of team to pass the Charter County and Regional Transportation System Surtax, allowing charter counties to levy an up to 1% surtax to fund transportation and transit projects.
• Advocated successfully for state funding to client municipalities, including “Main Street” improvements, recreation facilities, and water/sewer projects.
• Worked to exempt an Orange County, Florida municipality from inclusion in the Wekiva River Basin Management Area and its proposed septic tank regulations.
• On behalf of the Florida Beekeepers Association, secured a $2,000,000 appropriation for apiary research and extension laboratory.
• Secured an appropriation of $1,000,000 for the Central Florida Regional Transportation Authority to mitigate costs associated with the I-4 Ultimate construction project in Central Florida.
**Juarez & Associates, Orlando, Florida**  
*Vice President*  
- Served as State field coordinator for presidential campaign  
- Worked with clients to maneuver projects through municipal and county governments  
- Developed and managed a commercial office building in downtown Orlando  
- Developed and managed the only public, privately owned parking garage in downtown Orlando  
- Worked on behalf of clients to vacate public right-of-ways; rezone property; annex properties into municipalities  
- Negotiated with the St. Johns River and South Florida Water Management Districts on behalf of clients.

**EDUCATION**

*University of Florida, College of Liberal Arts & Sciences*, Gainesville, FL  
Bachelor of Arts, Political Science

*Georgetown University, Institute of Comparative Political and Economic Systems*  
Washington, D.C.  
Graduate/Institute Fellow

**PROFESSIONAL AFFILIATIONS**

- Florida Task Force on the Availability and Affordability of Long-Term Health Care  
- Orlando FIRST Regional Committee  
- Greater Osceola United Soccer Club, Past President  
- Greater Central Florida Youth Soccer League, Executive Board Member  
- Republican Executive Committee, Member
James Anaston-Karas is an independent contractor who will be a member of the JEJ & Associates team. He has over thirty years of experience working as a planning consultant, a policy coordinator for the Speaker of the House, county director for the South Florida Water Management District, county legislative manager, and adjunct professor at Florida Atlantic University.

Mr. Anaston-Karas brings to his clients an insider knowledge of both state and county governments. As a planner and consultant he understands the challenges municipalities face regarding economic development, growth, water and sewer issues, environmental concerns, and home rule importance.

Among the studies he has performed for local governments as a private consultant are the Martin County Enterprise Zone Strategic Development Plan, the Martin County Scenic Highway Designation, a Business Development Board of Martin County-SWOT/Strategic Plan Update, and the East Coast Buffer Land Management Plan (Public Use, Conservation, Everglades Restoration), among others.

Jim received his Master of City and Regional Planning from the Ohio State University and his Bachelor of Arts, Political Science, from Southern Illinois University.

He has served as the Vice Chair of Sustainable Treasure Coast, Inc., a Vice Chair of the Urban Land Institute, ex-officio member of the South Florida Regional Planning Council, and a member of the Florida Redevelopment Association.
James Anaston-Karas
State and Local Strategic Advocacy

Professional Synopsis
Senior manager with 30-years of accomplishments in local, regional, and state government advocacy and grants; former legislative staff, city/county government lobbyist and strategic planning consultant. Twelve years combined experience in Florida State Legislature; over ten years project experience in Western Martin County; former consultant to Martin County. Economic development for distressed areas; stormwater, water resource and water utility expertise.

Relevant Experience
• **Martin County:** Wide variety of community planning consulting projects interacting with or provided services to numerous Martin County agencies or departments. Facilitated annual County Commission annual Strategic Plan; served as Administrator for Martin County’s first Enterprise Zone (in Indiantown). Departments and agency interaction includes: Administration, Growth Management, Engineering, Parks and Recreation, County CRA, Martin MPO, and the Business Development Board. Served as Martin County Commission appointee to the Steering Committee for the Martin/St. Lucie Regional Waterways Plan; coordinated the Strategic Indiantown Heritage/Living History Strategic Plan funded by the County Commission, and coordinated the Florida Scenic highway designation by FDOT for the Martin Grade. Since 2005.
• **Legislative Manager, Broward County.** Drafted and executed complex legislative agenda as registered lobbyist managing 9-member contract lobbying team as to secure multi-millions in variety of appropriations including for regional economic drivers. President, Florida Association for Intergovernmental (City/County) Relations. 4 ½ years.
• **Policy Coordinator for Speaker of Florida House, Growth Management House Subcommittee Chief Analyst, Senior Legislative Aide in the Florida Senate.** Specialties in growth management, intergovernmental coordination, water and natural resources, annexation and special districts. Assisted with major legislation such as intergovernmental conflict resolution, Preservation 2000 and inflation-indexed gas taxing. 8 years.
• **Director, South Florida Water Management District,** Broward County Service Center. Liaison between County, 29 cities and SFWMD. Managed staff team, land use, utility/water supply planning including over $50 M water resource partnership contracts. Staff to Governor’s Commission for Sustainable South Florida. Ex-Officio Member, South Florida Regional Planning Council. Expert witness defending Everglades Restoration Plan. 7-1/2 years.
• **Co-Director of VHB Miller Sellen’s** Stuart office, providing community and resource planning, civil engineering, and design/site planning services to public and private clients for over 35,000 acres in Treasure Coast region. Waterside community redevelopment master planning. 5 years.
• **Master Planning Manager.** Mixed-use planning for various public and private clients balancing resource conservation with Florida real estate and market segment expertise including commercial/retail, agri-business, industrial, and seaport trade/logistics. 7 years.
• **Adjunct Professor, Environmental Planning,** Florida Atlantic University. 3 years.

Education/ Certifications
• Master of City and Regional Planning, Ohio State University.
• Certificate, Liberal Arts and Architecture, Oxford University, England.
• Bachelor of Arts, Political Science, Southern Illinois University.
• Certificate, Charrette Planning, National Charrette Institute.
• Certificate, Advanced Facilitation, Broward County Board of County Commissioners.
• Merchant Mariner Credential, (Sea Captain) 50 Ton Master, United States Coast Guard.

Select Memberships/Activities (Past & current)
• Marine Industries Association of the Treasure Coast. Board Member.
• Sustainable Treasure Coast, Inc. Vice Chair.
• Urban Land Institute. Vice Chair, Southeast Florida/Caribbean Advisory Board.
• American Planning Association (Florida). Legislative Policy Committee.
• Chambers of Commerce & Economic Councils. Various affiliations & presentations.
• South Florida Regional Planning Council (Gubernatorial appointee). Ex-officio member.
• Florida Redevelopment Association, Member.
JEJ & Associates Relationships Highlights

Governmental consulting is all about knowing the issues, engaging the necessary officials who can provide the help to achieve goals, following through to keep items moving, doing the administrative work to keep track of both efforts and tasks to be completed, working with the client and other team members to facilitate action, and finally, relishing the successes.

Ms. Juarez develops relationships with the widest range of governmental officials and staff. Her philosophy is to have relationships before issues arise, rather than try to develop a relationship based on client priorities. Whether advocating for funding, legislative changes, new legislation, or administrative rules, JEJ & Associates has excelled at every step of the process because of the trust these relationships have created.

Legislative Branch

JEJ & Associates has strong relationships with members of the Legislature, including Senate President Bill Galvano (R-Bradenton). Ms. Juarez has worked successfully with President Galvano since he was first elected to the House of Representative in 2002 and subsequently to the Senate in 2012.

President Galvano, and the majority office, have established leadership teams which are filled by experienced legislators. The President Pro Tempore is Senator David Simmons (R-Longwood), who is from Central Florida; the Minority Leader Pro Tempore is Senator Bill Montford (D-Tallahassee); the Majority Leader is Senator Kathleen Passidomo (R-Naples) and the Minority Leader is Senator Audrey Gibson (D-Jacksonville). All of these leaders are longtime policy makers with whom JEJ & Associates has strong relationships.

Throughout her career, Ms. Juarez has worked with the Hispanic Caucus, especially the members of the Miami-Dade delegation, on a variety of issues. This working relationship extends to Speaker Jose Oliva. Speaker Oliva’s leadership team for his 2018-20 speakership includes Representatives MaryLynn Magar (R-Hobe Sound and part of the Martin County legislative delegation) as Speaker Pro Tempore, Chris Sprowls (R-Clearwater) as Rules Chair, and Representative Dane Eagle (R-Cape Coral) as Majority Leader. Ms. Juarez has worked with all of them since they began their terms in the House.

She also works productively with the members of the Martin County legislative delegation, which includes Senator Gayle Harrell, as well as previously mentioned Representative MaryLynn Magar and Representative Toby Overdorf.

While committee chairs are important throughout the legislative sessions because they control agendas and therefore hold considerable sway over potential legislative actions, committee members on both sides of the aisle are also important to successful lobbying efforts. Individual members may submit amendments to legislation as it moves through the committees on which they serve. This provides the opportunity for the Village to change bills, via addition or subtraction, as they move through the process.
Looking forward towards the 2021 and 2022 sessions, we can expect significant changes within the two chambers. With term limits, there will be many first-time legislators with whom JEJ & Associates will introduce to the Village and convey its priorities to new leaders. Senator Wilton Simpson (R-Spring Hill) has been designated as the Senate President for the period of 2021-2022. Likewise, Representative Chris Sprowls (R-Clearwater) will assume the House Speaker position. We anticipate a strong working relationship with these leaders.

**Executive Branch**

Governor Ron DeSantis is currently in his second year as Florida’s 46th Governor and former Representative Jeanette Nuñez is our Lieutenant Governor. From the point of view of Indiantown, two of the most important appointments the Governor made after his inauguration were his Chief of Staff and the State Budget Director. For Chief of Staff, he chose Shane Strum, who is a veteran of the position having served as the Chief of Staff to former Governor Charlie Crist. The Policy Director is Chris Spencer who serves under the Budget Director. Stephanie Kopelousas serves as the legislative affairs director and formerly was the Clay County Administrator and Florida Department of Transportation Secretary. Ms. Juarez’s previous work with all of these individuals will provide great access for the Village.

While this section highlights relationships that Lena Juarez has, it is by no means a complete list of contacts. Regardless of any executive agency or committee of the Legislature from which help is needed, JEJ & Associates will have a contact to reach on behalf of the County.

In addition to Governor DeSantis leadership team, JEJ & Associates has contacts with all the Cabinet members. There is a strong relationship with Commissioner Nikki Fried of the Department of Agriculture and Consumer Services. Attorney General Ashley Moody and Chief Financial Office Jimmy Patronis round out the members of the Florida Cabinet.

As you can see Lena Juarez, and JEJ & Associates, are tuned into the legislators, the all-important committee and legislative staff, agencies, and Governor’s office which undoubtedly will benefit the Village of Indiantown.
TECHNICAL APPROACH TO SCOPE OF SERVICES

In previous sections, we have conveyed our expertise and demonstrated our successes within the field of local government representation. We will now focus on the approach JEJ & Associates will utilize to advance the Village of Indiantown’s legislative platform and the efforts we will employ to keep the County informed as to the activities of the Legislative and Executive branches of Florida government as well as the local efforts with Martin County and other relevant agencies.

Unfortunately, with a March 1st anticipated contract start date and a scheduled end date for the 2020 Legislative Session of March 13th, there is little which can be done regarding any specific legislative priorities this session. JEJ & Associates will be able to provide you with a summary of the items pertinent to Indiantown and perhaps the amendatory process may be an avenue to explore for certain items. However, the Senate rules establish March 3rd as the last day for regularly scheduled committee meetings meaning any amendments would have to originate on the chamber floor. Chances of any successful conclusion at that late date would be minimal.

However, Indiantown had the foresight to ensure that its appropriation request for Road/Storm Water Drainage Restoration in the amount of $2,750,000 was filed with each legislative chamber prior to the deadlines. With both requests timely filed the House assigned bill number 2639, as per the chamber’s rules. Also as required, the bill was heard in the House Transportation & Tourism Appropriations Subcommittee on December 10th and passed on a unanimous 9-0 vote. The request is now positioned to be considered in the House proposed budget.

The Governor released his proposed budget prior to the start of the legislative session. Each chamber will be working on their respective proposals during the sixty-day regular session. Typically, the House and Senate will release their proposals in the next week or two and negotiate their differences during the budget conference closer to the end of session. After passing the final agreed-upon budget, the Legislature will present the final proposed budget to the Governor for his consideration. The Governor will have until June 30th, the end of the current fiscal year, to review and veto portions of the budget.

Initial Contact with the Village of Indiantown

The JEJ & Associates team, working in conjunction with Village staff, will be a proactive advocate for Indiantown. We understand that the Village Council approved a 2020 legislative platform on December 12th and has made the tough decisions about future objectives. We look forward to the 2021 session and will offer our advice and recommendations on your future agenda based on our experience and knowledge of the legislative process and political developments. Overall, Indiantown’s key focus is to ensure the funding of its water/stormwater project and to protect home rule powers. We will maintain open and constant communications amongst our team and the Village; and continually advocate and promote Indiantown.

Good communication between the client and the consultant is of the upmost importance as we work towards priority solutions. Ms. Juarez will remain available, whether in person,
or by telephone, electronic mail or text, throughout the term of the contract to discuss issues concerning the Village. This includes 24-hour availability during the legislative committee weeks, the regular, extended and any special sessions as needs arrive.

Upon award of a contract, JEJ & Associates will schedule appointments with the Village Manager, Howard Brown, and your management analyst, Daniel Eick and Council Members, as needed. During these meetings, Ms. Juarez will review past and future issues and help develop strategies to achieve the Village’s future legislative platform. Responsiveness to the Village and its staff will be of the highest concern to all of JEJ & Associates’ team.

**Pre-Session Work**

We have addressed the 2020 Legislative Session in the previous section. Now we will look forward to how we will approach future sessions.

JEJ & Associates will help shape Indiantown’s legislative agenda, oversee the drafting of legislation and/or amendments, identify and secure legislative sponsors for bills and amendments and persuade members of the Florida Senate and House of Representatives to vote for issues put forth in the approved legislative platform by Indiantown.

Our approach is to work year-round with legislators, their staff and key agency contacts in order to maintain good working relationships and bring issues to their attention early so that solutions may be quickly realized. We will select a strategy or strategies in consultation with the Village that achieves goals based on resources, time and degree of difficulty.

A key component of the Scope of Services and the priorities of the Village will be seeking state appropriations. With this understanding JEJ & Associates will work on appropriations requested by the Council as well as review existing, or new, programs that may provide opportunities for Indiantown. As previously discussed, JEJ & Associates has extensive experience in local government appropriation requests, including water projects, historical grants, and other funding opportunities.

In order to achieve the Village’s appropriations requests, JEJ & Associates would first research whether local legislative delegation members are part of the assigned appropriation subcommittees. House rules require these subcommittees to hold a hearing on individual requests in order to be considered by the full Appropriations Committee. For maximum chances of having the requests move forward, we will need to ensure the House holds these hearings and includes Indiantown’s priorities on their agenda. It is important to note that Senate rules are different. The Senate does not have appropriation requests deadlines nor requires individual hearings as they craft their budget. The budget conference process is the key to a successful outcome for these requests.

The budget conference moves quickly and out of view of the public eye as the committees discuss and reach compromises. This is the time when lobbyists work their hardest to ensure inclusion. Twenty-four/seven is the mantra at this time of year as JEJ & Associates works the members of the budget conference. Throughout all of these steps, Ms. Juarez
and the JEJ & Associates team will keep the Village updated in real time as to all developments.

Ms. Juarez would also determine, through strategy meetings with the Village staff, whether executive agency support would be of benefit. If so, we will work with our agency contacts to achieve favorable backing, which can then be reported to legislators and their committees.

While the political landscape may change in future years, in this year (as it has been since 1999) both legislative chambers are controlled by Republicans. The political reality is that appropriation requests are more likely to be approved should Republicans file the requests. This does not mean that Democratic members are less skillful or influential; it simply acknowledges the reality of Republican control of the Florida Legislature. The Martin County legislative delegation is comprised of one senator and two representatives; all of which are Republican. Representative MaryLynn Magar will be termed out of office with this session being her final one. Currently four candidates have indicated a desire to run, including three Republicans and one Democrat. They are Carl Domino, Rick Kozell and John Snyder (all Republicans) and the lone Democrat, Jeremy Kelly. Senator Gayle Harrell and Representative Toby Overdorf are looking towards re-election without current opposition.

Additionally, JEJ & Associates will be conducting research on the Village’s legislative platform and preparing the necessary background pieces. All filed bills, which total over 3,000 annually, will be reviewed, using our subscription to the leading legislative news and information service, for their relevancy to Indiantown. We will develop information sheets which outline issue(s) and explain solutions as required. Our firm will solicit, and provide drafts of letters of support for issues as needed, work with staff to prepare and submit any grant applications and assist in preparing any required appropriation requests with both chambers. This groundwork will organize the team for its upcoming meetings with decision-makers.

Prior to the start of any legislative activities, our firm will be reviewing the various funding programs the State offers local governments for any relevant opportunities Indiantown may have. We will be especially searching for grant programs that may involve historical or cultural grants, environmental protection, clean water, and transportation, to name a few. Our staff has experience with assisting clients with their applications for these types of funding sources.

In further preparation for session, Ms. Juarez will ensure that the Village gains access to the relevant committee chairs and committee members, legislators and rising leaders. She will regularly coordinate the scheduling of meetings with new and seasoned legislators. We spend committee weeks in September, October, November and December prior to the session educating members about our clients and their priorities. These professional relationships allow JEJ & Associates to develop, gather and share information with the Village.

JEJ & Associates will be available for strategy calls with our points of contact; monitor the budget process and report developments; submit weekly briefings and/or reports during
legislative committee weeks and session; prepare an inclusive report upon completion of
the legislative session; be available for Council presentations; and respond to any other
items required or needed by Indiantown as requested in the Scope of Work outlined in the
Request for Proposal.

**Session Work**

As we look forward to 2021 JEJ & Associates will be laying the ground work regarding the
Village’s future platform. Any proposed bills and funding requests will need to be filed prior
to the start of the legislative session. Amendments can be filed during the session to
secure favorable outcomes for Indiantown as issues arise.

Our firm will continue to conduct research and background on developments, including bill
status and budgetary issues. As during committee weeks, we will monitor, attend, and
report relevant developments from committee hearings. We will meet with individual
legislators to discuss priorities. It would be beneficial if staff or board members could
accompany us during some meetings to establish a rapport between Indiantown and
legislators. This can be done before or during the session.

JEJ & Associates develops multiple solutions for priorities. With so many bills being filed,
we recognize that all of them will not be heard in committees. Often times this involves the
identification of alternative bills to which our issues can be attached through the
amendment process. We have been successful many, many times through this secondary
or even tertiary alternative.

Recognizing that appropriation requests are of high importance to the Village, Ms. Juarez
stays abreast throughout the budgetary process and works with legislators on the various
appropriations committees. The budget process is oftentimes chaotic as the end of the
regular Session nears. We will monitor and attend all budget conference meetings and
work with the various committees, legislators and their staffs advocating for the Village’s
requests.

During the legislative session, we will be submitting weekly status reports, and participate
in weekly strategy meetings. JEJ & Associates will be providing monthly reports to the
Village during the term of the contract outlining our activities the previous month. We will
also be available to attend Council meetings to provide in-person updates as required, and
as needed. As mentioned previously, we anticipate a greater level of communication
between the Village staff and our team. We will ensure our availability by text, phone and
email.

JEJ & Associates is not a firm to stand on the sidelines and wait for unexpected crises.
We will enter the fray to fight on behalf of our clients. Part of that fight involves acting on
a timely basis as legislation develops. We do not view our job as done once bills have
been written or appropriations have been sponsored. As the legislation and budget moves
through the process, we will begin enlisting the support of the executive branch agencies
and the Governor’s office. Our experience tells us that nothing is safe until the final vote
has been taken and the Governor signs it into law.
**Post Session Work**

Many firms see the end of Session as the end of their work. JEJ & Associates does not adhere to this philosophy. Rather, we see post-session time as a continuation of the process to develop relationships on behalf of our clients. No one can say our team is out of sight, out of mind. Throughout the remainder of the year Ms. Juarez travels the State to keep legislators apprised of client developments and issues which may be arising.

JEJ & Associates will adhere to all requirements of the State of Florida regarding lobbying, including registration, the submittal of financial reports and other rules and regulations propagated by either chamber.

Our firm, in conjunction with the Village’s input, will put this plan in action. Together we will ensure successful outcomes for the upcoming legislative session.

**Martin County**

In conjunction with our work at the State level we also recognize that the Village is seeking consulting help with Martin County. As stated, we recognize that specific area knowledge and understanding plays a key role in successfully cooperating with the County government. While JEJ & Associates would not be able to match the knowledge of Martin County by the Village Council members and staff, we believe that we can offer better understanding of County operations.

We have accomplished this by bringing onto our team a colleague with whom we have worked with for many years on projects. James Anaston-Karas will be leading the JEJ & Associates team for Martin County issues with the full backing and resources of the entire team of professionals.

As a contractor, Mr. Anaston-Karas has previously worked extensively with Martin County, authoring several studies. Among his consulting research is “Martin County Enterprise Zone Strategic Development Plan” and “Martin Grade Scenic Highway Designation”. He also worked on an Indiantown project during the previous year – “Strategic Action "Contact with the Community" and Re-branding”.

Because of this background he is keenly aware of the challenges Indiantown faces based upon it being a small village, whether it be the need of further economic development, cultural heritage, increasing median household incomes, and reduce the poverty rates.

The JEJ & Associates team will hold introductory meetings with Village Council members and staff to develop a priority list of non-state related items. These will encompass Martin County, and the South Florida Water Management District, among others areas of authority over Indiantown.

Once the Council has established a list of priorities from these overseeing bodies, we will begin our work to develop strategies and a plan of action to accomplish those goals. While Indiantown undoubtedly enjoys a positive working relationship with Martin County, the reality is that the Board of County Commissioners receives considerable pressure from the
coast dwelling communities of the County for increasing services and allocating additional resources. These pressures can lead to a lower return on the Indiantown tax revenues sent to the County. The JEJ & Associates team will work with all parties to ensure Indiantown receives its fair share of economic development opportunities.

**Reporting**

JEJ & Associates will provide monthly reports as to the efforts and successes. In addition, team members will be available for telephone conferences, meetings with staff, and reporting at Council meetings. We will meet, or exceed all requirements in the RFP.
**Fees**

We recognize that contract lobbying work is unique in that team members are working continuously on behalf of the Village of Indiantown. We never know when a conversation with a legislator, agency head, staffer, or other knowledgeable person will lead to an opportunity for Indiantown.

JEJ & Associates proposes that we enter into a two-year contract with a monthly fee of $3,500. This fee will be all inclusive. Such a contract will give Indiantown representation through the 2021 Legislative Session and two years of local and regional representation. JEJ & Associates believes that this will provide the Village with a fixed expenditure that will adequately benefit both parties.

We welcome any negotiation regarding a contract structure to arrive at an agreement.

**Implementation Schedule**

Due to the nature of the governmental consulting business, we are unable to provide a timeline, other than the dates associated with the legislative sessions, for deliverables. JEJ & Associates will commit to a schedule regarding meetings with Village officials to discuss the priorities and then provide a suggested timetable.

**Certificate of Insurance**

Prior to the execution of a contract, JEJ & Associates will be providing the Village of Indiantown with a certificate of insurance outlining the required coverages.

**Business Tax Certificate**

JEJ & Associates will secure a business tax certificate from the Village of Indiantown.
JEJ & Associates References

The following represents a select list of references for Lena Juarez and JEJ & Associates. Outlined above in the response are outcomes of our work.

City of St. Augustine
75 King Street
St. Augustine, Florida 32084
John P. Regan, City Manager
904-825-1006
jregan@citystaug.com
2014 to present
City Lobbyist

Greater Orlando Aviation Authority
One Jeff Fuqua Boulevard
Orlando, Florida 32827-4399
Luis Olivero, Assistant Director Airport Affairs
407-825-2294
lolivero@goaa.org
2013 to present
Airport Authority Lobbyist Team Member

Leon County Board of County Commissioners
301 South Monroe Street
Tallahassee, Florida 32301
Andy Johnson, Assistant to the County Administrator for Legislative and Strategic Initiatives
850-606-5383
JohnsonAn@LeonCountyFL.gov
2017 to present
Lobbyist Team Member

ChargePoint Inc.
240 East Hacienda Avenue
Campbell, California 95008
David Schatz, Former Director of Policy
215-858-4748
schatzds@gmail.com
2017 to present
Florida Lobbyist
James Anaston-Karas References

Florida League of Cities, Inc.
301 S. Bronough Street, Suite 300
Tallahassee, Florida 32301
C. Scott Dudley, Legislative Affairs Director
850-570-7296
Sdudley@flcities.com

Broward County Board of County Commissioners
115 S. Andrews Avenue, Room 303
Fort Lauderdale, Florida 33301-1817
Patricia West, Deputy Director
Human Services Department
954-347-1885
Ptwpatricia@aol.com
“Lena and the JEJ team are an invaluable resource for the Florida State Beekeepers Association. Lena’s well-respected rapport with the key decision and policy makers at the state level has been an integral part of our success in Tallahassee. I am especially impressed by her ability to analyze an issue, break it down, then present it in a clear and concise manner. We are very pleased with the relationship and look forward to new challenges with the help of JEJ Associates.”

Tony Hogg
Former President, Florida State Beekeepers Association
The 2018 Legislative Session adjourned Sine Die on Sunday, March 11, 2018 at 4:16 p.m. after voting affirmatively for the Fiscal Year 2018-2019 budget. As a result of the Parkland school shooting, the Session was upended during the last couple of weeks as the leadership searched for ways to respond to the tragic circumstances. They wanted to demonstrate that they were moving forward with solutions, partially a result of the pressure applied by the students and parents of the school. Legislation addressing school safety, mental health and firearms’ restrictions was quickly crafted and the budget was realigned to meet those priorities. Many bills died as a result of the work required for the shooting response.

The following Board report represents the events and status of items of interest to LYNX.

**Budget Proposals.** The final budget sent to Governor Rick Scott totaled $88,727,534,353. Of this total $32,383,053,587 is funded from general revenues and $56,344,480,766 is from trust funds. Pertinent line items include:

<table>
<thead>
<tr>
<th>Line Item Description</th>
<th>Amount</th>
</tr>
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<tbody>
<tr>
<td>Transportation Disadvantaged Grants &amp; Aids</td>
<td>59,906,668</td>
</tr>
<tr>
<td>Public Transit Development Grants</td>
<td>434,904,833</td>
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<td>Florida Rail Enterprise</td>
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<td>Intermodal Development Grants</td>
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<tr>
<td>Florida Rail Enterprise</td>
<td>10,090,856</td>
</tr>
</tbody>
</table>

**LYNX Budget Item.** In addition to the above items, the budget includes $2,000,000 to fund the LYNX Operations Center expansion project. These funds are in Local Transportation Projects Line Item 1906A. We will advocate for this funding with the Governor’s Office now that the appropriations bill has passed the Legislature and the appropriations bills have been sent to the Governor as of March 14th. He has 15 days to act on the bills.

**Charter County and Regional Transportation System Surtax.** Representative Bryan Avila (R-Hialeah) and Senator Rene Garcia (R-Hialeah) introduced bills which would modify the allowable uses of revenues for counties which chose to implement the Charter County and Regional Transportation Surtaxes. These bills would have only affected Duval and Miami-Dade Counties who currently collect the surtax, each at one-half percent (half of the allotted one percent maximum). The House bill, CS/CS/HB 243 passed the House on February 21st on a 106-7 vote and was sent to the Senate in messages. It was never taken up by the Senate as its bill, SB 688, failed to clear all of its committee references. The House bill was indefinitely postponed and removed from consideration on March 10th.
**Alternative Transportation Authority.** SB 1200 by Senator Dana Young (R-Tampa) and HB 535 by Representative Bryan Avila (R-Hialeah) would have created a Statewide Alternative Transportation Authority. The mission for the Authority would have been to design and construct alternative transportation systems. A large portion of the funding would be earmarked for specific uses, with $10 million available to fund such projects. There was considerable discussion in committees about the bill due to the fact that most of the $60 million appropriated would have been earmarked to TBARTA and Miami-Dade County. With neither bill moving forward Senator Jeff Brandes (R-St. Petersburg) amended his bill CS/SB 852 to include the language but removed Miami-Dade County and substituted the Jacksonville Transportation Authority. The bill never received a floor vote and died on the calendar.

**Transportation Disadvantaged.** Senator Rene Garcia introduced legislation (SB 770) that would revise the duties of the community transportation coordinators and coordinating boards for services provided to the transportation disadvantaged community. The specific purpose is to require these coordinators to evaluate cross county mobility as a means to reduce costs, provide greater efficiency and improve accessibility. The bill was referred to three committees and was heard in one. Without a House companion, the bill died in committee at the end of Session.

**Texting While Driving.** Senate Bill 90, sponsored by Senator Keith Perry (R-Gainesville), was reported favorably by three committees. It never received a hearing in the Appropriations Committee and did not make it to the floor for a vote. House Bill 33, on the other hand, sponsored by Representatives Jackie Toledo (R-Tampa) and Emily Slosberg (D-Delray Beach) along with fifty other cosponsors, was approved by the House on a 112-2 vote and was sent to the Senate in messages. With the Senate appearing unwilling to bring it to a floor vote, Representative Slosberg attempted to attach her language to three other bills the House was voting upon. In each case, the amendment was not considered, and the bill died in messages.

**Meetings & Events**

JEJ & Associates attended the following meetings and events:

Attended all relevant legislative transportation committee meetings in the Senate and House throughout the interim committee weeks and Session.

Attended all relevant committee meetings concerning or relating to LYNX priorities and concerns.

Followed the Revenue Estimating Conferences to monitor the State budget process.

Participated in the Florida Public Transportation Association’s weekly telephonic legislative update meetings.

Telephone conferences with FPTA director Lisa Bacot to coordinate activities and discuss LYNX priorities.

Met with legislators regarding issues of interest to LYNX at the appropriate committee stop.

Held telephone conferences with Chief Executive Officer Edward Johnson and Tiffany Homler.

Lobbied members on behalf of the $2M appropriation as it moved through the budget conference process.
START OF 2018 SESSION

The 2018 Legislative Session commenced at noon on January 9th, beginning its sixty days of work. The first day was filled with opening remarks by Senate President Joe Negron and House Speaker Richard Corcoran to their respective chambers, and Governor Rick Scott before a joint session of the Legislature. Each leader provided their perspective views on the State and their vision for the 2018 Session and beyond.

CHARTER COUNTY SURTAX HB 243/SB 688

These bills deal with modifications to the allowable uses of revenues from the implementation of the charter county transportation surtax. A difference between the two bills is that the Senate version specifically allows for the purchase of buses and other capital costs. HB 243, by Representative Bryan Avila (R-Hialeah), was heard on opening day in the Ways & Means Committee, where it was approved on a 14-6 vote. It has one committee stop, the Government Accountability Committee, remaining. SB 688, by Senator Rene Garcia (R-Hialeah), has been approved in one of its three committees of reference.

FPTA LEGISLATIVE CALL

FPTA held its first legislative lobbying call for the 2018 Session on Thursday. Executive Director Lisa Bacot led the discussion of the issues the Association will be following this year. Both Lena Juarez and Robert Miller, along with Tiffany Homler of LYNX were on the call.

NATURAL GAS FUEL FLEET VEHICLE REBATE PROGRAM

During the FPTA call Lisa Bacot asked Lena Juarez to report on the possible funding of the natural gas fuel fleet vehicle rebate program for the upcoming fiscal year. Ms. Juarez reported she had spoken with Senator Wilton Simpson (R-Spring Hill) and was told there was no chance that this issue would be brought to the forefront this legislation session.

ALTERNATIVE TRANSPORTATION AUTHORITY HB 535/ SB 1200

These bills would authorize the creation of a Statewide Alternative Transportation Authority whose purpose would be to design and construct alternative transportation systems. They would have $10 million available for counties to fund such projects, in addition to other dedicated funds.
State of Florida

Minority Business Certification

JEJ & Associates, Inc.

Is certified under the provisions of 287 and 295.187, Florida Statutes, for a period from:

05/13/2019 to 05/13/2021

Jonathan R. Satter, Secretary
Florida Department of Management Services

Office of Supplier Diversity
4050 Esplanade Way, Suite 380
Tallahassee, FL 32399
850-487-0915
www.dms.myflorida.com/osd
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Complete Count Committee Project and Budget Approval

SUMMARY OF ITEM: Several meetings ago, the Village Council designated Vice Mayor Janet Hernandez to serve as the Complete Count Committee Chair. At the January 30, 2020, Special Meeting, Vice Mayor Janet Hernandez provided an update to the Village Council. Since that time, the Vice Mayor and the Village Manager have met and put together a Complete Count Committee Project Budget. Said budget will be made available prior to the February 13, 2020, Council meeting.

RECOMMENDATION: Staff recommends that $15,000.00 be allocated for the Project, as delineated in the forthcoming attachment.

PREPARED BY: Howard W. Brown, Jr., Village Manager

DATE: 2/5/2020
AGENDA ITEM TITLE: RESOLUTION NO. XXX-2020: A RESOLUTION OF THE VILLAGE COUNCIL OF THE VILLAGE OF INDIANTOWN, FLORIDA, ACCEPTING THE STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION PUBLIC TRANSPORTATION GRANT AGREEMENT (FINANCIAL PROJECT NO. (446657–1–84-01) TO PROVIDE FUNDING ASSISTANCE TO THE VILLAGE OF INDIANTOWN FOR PUBLIC TRANSPORTATION OPERATING SERVICES; AUTHORIZING THE MAYOR TO EXECUTE THE AGREEMENT; FURTHER AUTHORIZING THE VILLAGE ATTORNEY TO EXECUTE THE AGREEMENT BY APPROVING IT AS TO FORM AND CORRECTNESS; AND PROVIDING AN EFFECTIVE DATE.

SUMMARY OF ITEM: This grant will help fund Saturday bus service within the Village. The Saturday bus service will cost $50,000.00 annually for each of the two contracted years, of which this FDOT grant will provide $12,500.00 annually for two years (for a total grant of $25,000.00) with an additional $12,500.00 match required from the Village annually for two years (for a total of $25,000.00). The additional annual $25,000.00 needed to fund the service will be supplied by the State directly to the bus provider, with no Village involvement.

RECOMMENDATION: Staff recommends approval.

PREPARED BY: William Archebelle, Director of Public Works

DATE: 2/5/2020

AT obligatoryments:

Description
Resolution No. XXX-2020
Public Transportation Grant Agreement
WHEREAS, the Village Council of the Village of Indiantown, Florida, has made the following determinations:

1. The Florida Department of Transportation has awarded the Village funding assistance public transportation system (Financial Project No. 446657–1–84-01).

2. The Council should authorize and approve execution of the Public Transportation Grant Agreement with the State of Florida Department of Transportation for the above-referenced project.

NOW, THEREFORE BE IT RESOLVED, by the Village Council of the Village of Indiantown, Florida, as follows:

SECTION 1. GRANT ACCEPTANCE. The Council hereby accepts and approves the Public Transportation Grant Agreement with the State of Florida (Financial Project No. 446657–1–84-01) to provide funding to provide funding assistance to the Village of Indiantown for public transportation operating services.

SECTION 2. AUTHORIZATION FOR EXECUTION. The Council hereby authorizes the Mayor to execute the above-referenced agreement and further authorizes the Village Attorney to execute the agreement by approving it as to form and
Resolution No. XXX-2020 Accepting FDOT Transportation Grant

correctness.

SECTION 3. EFFECTIVE DATE. This Resolution shall take effect immediately upon adoption.

ADOPTED this 13th day of February, 2020.

ATTEST: VILLAGE OF INDIANTOWN, FLORIDA

_____________________________   _____________________________
SUSAN A. OWENS, MPA, MMC    GUYTON STONE
VILLAGE CLERK     MAYOR

REVIEWSED FOR FORM AND CORRECTNESS:

_____________________________
WADE C. VOSE
VILLAGE ATTORNEY
THIS PUBLIC TRANSPORTATION GRANT AGREEMENT ("Agreement") is entered into by and between the State of Florida, Department of Transportation, ("Department"), and the Village of Indiantown, ("Agency"). The Department and the Agency are sometimes referred to in this Agreement as a “Party” and collectively as the “Parties.”

NOW, THEREFORE, in consideration of the mutual benefits to be derived from joint participation on the Project, the Parties agree to the following:

1. **Authority.** The Agency, by Resolution or other form of official authorization, a copy of which is attached as Exhibit “D”, Agency Resolution and made a part of this Agreement, has authorized its officers to execute this Agreement on its behalf. The Department has the authority pursuant to Section(s) 341.051, Florida Statutes, to enter into this Agreement.

2. **Purpose of Agreement.** The purpose of this Agreement is to provide for the Department’s participation in providing operating funds for the Indiantown Saturday Shuttle Service - Years 1 and 2 of 3, as further described in Exhibit "A", Project Description and Responsibilities, attached and incorporated into this Agreement ("Project"), to provide Department financial assistance to the Agency, state the terms and conditions upon which Department funds will be provided, and to set forth the manner in which the Project will be undertaken and completed.

3. **Program Area.** For identification purposes only, this Agreement is implemented as part of the Department program area selected below (select all programs that apply):

   - Aviation
   - Seaports
   - **Intermodal**
   - Rail Crossing Closure
   - Match to Direct Federal Funding (Aviation or Transit)

   (Note: Section 15 and Exhibit G do not apply to federally matched funding)
   - Other

4. **Exhibits.** The following Exhibits are attached and incorporated into this Agreement:

   - Exhibit A: Project Description and Responsibilities
   - Exhibit B: Schedule of Financial Assistance
   - Exhibit C: Terms and Conditions of Construction
   - Exhibit D: Agency Resolution
   - Exhibit E: Program Specific Terms and Conditions
   - Exhibit F: Contract Payment Requirements
   - Exhibit G: Financial Assistance (Single Audit Act)
5. **Time.** Unless specified otherwise, all references to “days” within this Agreement refer to calendar days.

6. **Term of Agreement.** This Agreement shall commence upon full execution by both Parties (“Effective Date”) and continue through March 31, 2022. If the Agency does not complete the Project within this time period, this Agreement will expire unless an extension of the time period is requested by the Agency and granted in writing by the Department prior to the expiration of this Agreement. Expiration of this Agreement will be considered termination of the Project. The cost of any work performed prior to the Effective Date or after the expiration date of this Agreement will not be reimbursed by the Department.

   a. If this box is checked the following provision applies:

      Unless terminated earlier, work on the Project shall commence no later than the _ day of __ or within __ days of the issuance of the Notice to Proceed for the construction phase of the Project (if the Project involves construction), whichever date is earlier. The Department shall have the option to immediately terminate this Agreement should the Agency fail to meet the above-required dates.

7. **Amendments, Extensions, and Assignment.** This Agreement may be amended or extended upon mutual written agreement of the Parties. This Agreement shall not be renewed. This Agreement shall not be assigned, transferred, or otherwise encumbered by the Agency under any circumstances without the prior written consent of the Department.

8. **Termination or Suspension of Project.** The Department may, by written notice to the Agency, suspend any or all of the Department’s obligations under this Agreement for the Agency’s failure to comply with applicable law or the terms of this Agreement until such time as the event or condition resulting in such suspension has ceased or been corrected.

   a. If the Department intends to terminate the Agreement, the Department shall notify the Agency of such termination in writing at least thirty (30) days prior to the termination of the Agreement, with instructions to the effective date of termination or specify the stage of work at which the Agreement is to be terminated.

   b. The Parties to this Agreement may terminate this Agreement when its continuation would not produce beneficial results commensurate with the further expenditure of funds. In this event, the Parties shall agree upon the termination conditions.

   c. If the Agreement is terminated before performance is completed, the Agency shall be paid only for that work satisfactorily performed for which costs can be substantiated. Such payment, however, may not exceed the equivalent percentage of the Department’s maximum financial assistance. If any portion of the Project is located on the Department’s right-of-way, then all work in progress on the Department right-of-way will become the property of the Department and will be turned over promptly by the Agency.

   d. In the event the Agency fails to perform or honor the requirements and provisions of this Agreement, the Agency shall promptly refund in full to the Department within thirty (30) days of the termination of the Agreement any funds that were determined by the Department to have been expended in violation of the Agreement.

   e. The Department reserves the right to unilaterally cancel this Agreement for failure by the Agency to comply with the Public Records provisions of Chapter 119, Florida Statutes.
9. Project Cost:

a. The estimated total cost of the Project is $50,000. This amount is based upon Exhibit "B", Schedule of Financial Assistance. The timeline for deliverables and distribution of estimated amounts between deliverables within a grant phase, as outlined in Exhibit "B", Schedule of Financial Assistance, may be modified by mutual written agreement of the Parties and does not require execution of an Amendment to the Public Transportation Grant Agreement. The timeline for deliverables and distribution of estimated amounts between grant phases requires an amendment executed by both Parties in the same form as this Agreement.

b. The Department agrees to participate in the Project cost up to the maximum amount of $25,000 and, the Department's participation in the Project shall not exceed 50.00% of the total eligible cost of the Project, and as more fully described in Exhibit "B", Schedule of Financial Assistance. The Agency agrees to bear all expenses in excess of the amount of the Department's participation and any cost overruns or deficits involved.

10. Compensation and Payment:

a. Eligible Cost. The Department shall reimburse the Agency for allowable costs incurred as described in Exhibit "A", Project Description and Responsibilities, and as set forth in Exhibit "B", Schedule of Financial Assistance.

b. Deliverables. The Agency shall provide quantifiable, measurable, and verifiable units of deliverables. Each deliverable must specify the required minimum level of service to be performed and the criteria for evaluating successful completion. The Project and the quantifiable, measurable, and verifiable units of deliverables are described more fully in Exhibit “A”, Project Description and Responsibilities. Modifications to the deliverables in Exhibit “A”, Project Description and Responsibilities requires a formal written amendment.

c. Invoicing. Invoices shall be submitted no more often than monthly by the Agency in detail sufficient for a proper pre-audit and post-audit, based on the quantifiable, measurable, and verifiable deliverables as established in Exhibit “A”, Project Description and Responsibilities. Deliverables and costs incurred must be received and approved by the Department prior to reimbursement. Requests for reimbursement by the Agency shall include an invoice, progress report, and supporting documentation for the deliverables being billed that are acceptable to the Department. The Agency shall use the format for the invoice and progress report that is approved by the Department.

d. Supporting Documentation. Supporting documentation must establish that the deliverables were received and accepted in writing by the Agency and must also establish that the required minimum standards or level of service to be performed based on the criteria for evaluating successful completion as specified in Exhibit “A", Project Description and Responsibilities has been met. All costs invoiced shall be supported by properly executed payrolls, time records, invoices, contracts, or vouchers evidencing in proper detail the nature and propriety of charges as described in Exhibit “F”, Contract Payment Requirements.

e. Travel Expenses. The selected provision below is controlling regarding travel expenses:

X Travel expenses are NOT eligible for reimbursement under this Agreement.

— Travel expenses ARE eligible for reimbursement under this Agreement. Bills for travel expenses specifically authorized in this Agreement shall be submitted on the Department’s Contractor Travel Form No. 300-000-06 and will be paid in accordance with Section 112.061, Florida Statutes, and the most current version of the Department’s Disbursement Handbook for Employees and Managers.
f. **Financial Consequences.** Payment shall be made only after receipt and approval of deliverables and costs incurred unless advance payments are authorized by the Chief Financial Officer of the State of Florida under Chapters 215 and 216, Florida Statutes, or the Department’s Comptroller under Section 334.044(29), Florida Statutes. If the Department determines that the performance of the Agency is unsatisfactory, the Department shall notify the Agency of the deficiency to be corrected, which correction shall be made within a timeframe to be specified by the Department. The Agency shall, within sixty (60) days after notice from the Department, provide the Department with a corrective action plan describing how the Agency will address all issues of contract non-performance, unacceptable performance, failure to meet the minimum performance levels, deliverable deficiencies, or contract non-compliance. If the corrective action plan is unacceptable to the Department, the Agency will not be reimbursed. If the deficiency is subsequently resolved, the Agency may bill the Department for the amount that was previously not reimbursed during the next billing period. If the Agency is unable to resolve the deficiency, the funds shall be forfeited at the end of the Agreement’s term.

g. **Invoice Processing.** An Agency receiving financial assistance from the Department should be aware of the following time frames. Inspection or verification and approval of deliverables shall take no longer than 20 days from the Department’s receipt of the invoice. The Department has 20 days to deliver a request for payment (voucher) to the Department of Financial Services. The 20 days are measured from the latter of the date the invoice is received or the deliverables are received, inspected or verified, and approved.

If a payment is not available within 40 days, a separate interest penalty at a rate as established pursuant to Section 55.03(1), Florida Statutes, will be due and payable, in addition to the invoice amount, to the Agency. Interest penalties of less than one (1) dollar will not be enforced unless the Agency requests payment. Invoices that have to be returned to an Agency because of Agency preparation errors will result in a delay in the payment. The invoice payment requirements do not start until a properly completed invoice is provided to the Department.

A Vendor Ombudsman has been established within the Department of Financial Services. The duties of this individual include acting as an advocate for Agency who may be experiencing problems in obtaining timely payment(s) from a state agency. The Vendor Ombudsman may be contacted at (850) 413-5516.

h. **Records Retention.** The Agency shall maintain an accounting system or separate accounts to ensure funds and projects are tracked separately. Records of costs incurred under the terms of this Agreement shall be maintained and made available upon request to the Department at all times during the period of this Agreement and for five years after final payment is made. Copies of these records shall be furnished to the Department upon request. Records of costs incurred include the Agency’s general accounting records and the Project records, together with supporting documents and records, of the Contractor and all subcontractors performing work on the Project, and all other records of the Contractor and subcontractors considered necessary by the Department for a proper audit of costs.

i. **Progress Reports.** Upon request, the Agency agrees to provide progress reports to the Department in the standard format used by the Department and at intervals established by the Department. The Department will be entitled at all times to be advised, at its request, as to the status of the Project and of details thereof.

j. **Submission of Other Documents.** The Agency shall submit to the Department such data, reports, records, contracts, and other documents relating to the Project as the Department may require as listed in Exhibit "E", Program Specific Terms and Conditions attached to and incorporated into this Agreement.
k. **Offsets for Claims.** If, after Project completion, any claim is made by the Department resulting from an audit or for work or services performed pursuant to this Agreement, the Department may offset such amount from payments due for work or services done under any agreement that it has with the Agency owing such amount if, upon written demand, payment of the amount is not made within 60 days to the Department. Offsetting any amount pursuant to this paragraph shall not be considered a breach of contract by the Department.

l. **Final Invoice.** The Agency must submit the final invoice on the Project to the Department within 120 days after the completion of the Project. Invoices submitted after the 120-day time period may not be paid.

m. **Department's Performance and Payment Contingent Upon Annual Appropriation by the Legislature.** The Department’s performance and obligation to pay under this Agreement is contingent upon an annual appropriation by the Legislature. If the Department's funding for this Project is in multiple fiscal years, a notice of availability of funds from the Department's project manager must be received prior to costs being incurred by the Agency. See Exhibit “B”, Schedule of Financial Assistance for funding levels by fiscal year. Project costs utilizing any fiscal year funds are not eligible for reimbursement if incurred prior to funds approval being received. The Department will notify the Agency, in writing, when funds are available.

n. **Limits on Contracts Exceeding $25,000 and Term more than 1 Year.** In the event this Agreement is in excess of $25,000 and has a term for a period of more than one year, the provisions of Section 339.135(6)(a), Florida Statutes, are hereby incorporated:

> "The Department, during any fiscal year, shall not expend money, incur any liability, or enter into any contract which, by its terms, involves the expenditure of money in excess of the amounts budgeted as available for expenditure during such fiscal year. Any contract, verbal or written, made in violation of this subsection is null and void, and no money may be paid on such contract. The Department shall require a statement from the comptroller of the Department that funds are available prior to entering into any such contract or other binding commitment of funds. Nothing herein contained shall prevent the making of contracts for periods exceeding 1 year, but any contract so made shall be executory only for the value of the services to be rendered or agreed to be paid for in succeeding fiscal years; and this paragraph shall be incorporated verbatim in all contracts of the Department which are for an amount in excess of $25,000 and which have a term for a period of more than 1 year."

o. **Agency Obligation to Refund Department.** Any Project funds made available by the Department pursuant to this Agreement that are determined by the Department to have been expended by the Agency in violation of this Agreement or any other applicable law or regulation shall be promptly refunded in full to the Department. Acceptance by the Department of any documentation or certifications, mandatory or otherwise permitted, that the Agency files shall not constitute a waiver of the Department's rights as the funding agency to verify all information at a later date by audit or investigation.

p. **Non-Eligible Costs.** In determining the amount of the payment, the Department will exclude all Project costs incurred by the Agency prior to the execution of this Agreement, costs incurred after the expiration of the Agreement, costs that are not provided for in Exhibit “A”, Project Description and Responsibilities, and as set forth in Exhibit “B”, Schedule of Financial Assistance, costs agreed to be borne by the Agency or its contractors and subcontractors for not meeting the Project commencement and final invoice time frames, and costs attributable to goods or services received under a contract or other arrangement that has not been approved
in writing by the Department. Specific unallowable costs may be listed in Exhibit “A”, Project Description and Responsibilities.

11. General Requirements. The Agency shall complete the Project with all practical dispatch in a sound, economical, and efficient manner, and in accordance with the provisions in this Agreement and all applicable laws.

a. Necessary Permits Certification. The Agency shall certify to the Department that the Agency’s design consultant and/or construction contractor has secured the necessary permits.

b. Right-of-Way Certification. If the Project involves construction, then the Agency shall provide to the Department certification and a copy of appropriate documentation substantiating that all required right-of-way necessary for the Project has been obtained. Certification is required prior to authorization for advertisement for or solicitation of bids for construction of the Project, even if no right-of-way is required.

c. Notification Requirements When Performing Construction on Department’s Right-of-Way. In the event the cost of the Project is greater than $250,000.00, and the Project involves construction on the Department’s right-of-way, the Agency shall provide the Department with written notification of either its intent to:

i. Require the construction work of the Project that is on the Department’s right-of-way to be performed by a Department prequalified contractor, or

ii. Construct the Project utilizing existing Agency employees, if the Agency can complete said Project within the time frame set forth in this Agreement.

d. If this box is checked, then the Agency is permitted to utilize its own forces and the following provision applies: Use of Agency Workforce. In the event the Agency proceeds with any phase of the Project utilizing its own forces, the Agency will only be reimbursed for direct costs (this excludes general overhead).

e. X If this box is checked, then the Agency is permitted to utilize Indirect Costs: Reimbursement for Indirect Program Expenses (select one):

i. X Agency has selected to seek reimbursement from the Department for actual indirect expenses (no rate).

ii. Agency has selected to apply a de minimus rate of 10% to modified total direct costs. Note: The de minimus rate is available only to entities that have never had a negotiated indirect cost rate. When selected, the de minimus rate must be used consistently for all federal awards until such time the agency chooses to negotiate a rate. A cost policy statement and de minimis certification form must be submitted to the Department for review and approval.

iii. Agency has selected to apply a state or federally approved indirect cost rate. A federally approved rate agreement or indirect cost allocation plan (ICAP) must be submitted annually.

f. Agency Compliance with Laws, Rules, and Regulations, Guidelines, and Standards. The Agency shall comply and require its contractors and subcontractors to comply with all terms and conditions of this Agreement and all federal, state, and local laws and regulations applicable to this Project.

g. Claims and Requests for Additional Work. The Agency shall have the sole responsibility for resolving claims and requests for additional work for the Project. The Agency will make
best efforts to obtain the Department’s input in its decisions. The Department is not obligated to reimburse for claims or requests for additional work.

12. Contracts of the Agency:

a. Approval of Third Party Contracts. The Department specifically reserves the right to review and approve any and all third party contracts with respect to the Project before the Agency executes or obligates itself in any manner requiring the disbursement of Department funds, including consultant and purchase of commodities contracts, or amendments thereto. If the Department chooses to review and approve third party contracts for this Project and the Agency fails to obtain such approval, that shall be sufficient cause for nonpayment by the Department. The Department specifically reserves unto itself the right to review the qualifications of any consultant or contractor and to approve or disapprove the employment of the same. If Federal Transit Administration (FTA) funds are used in the Project, the Department must exercise the right to third party contract review.

b. Procurement of Commodities or Contractual Services. It is understood and agreed by the Parties hereto that participation by the Department in a project with the Agency, where said project involves the purchase of commodities or contractual services where purchases or costs exceed the Threshold Amount for CATEGORY TWO per Section 287.017, Florida Statutes, is contingent on the Agency complying in full with the provisions of Section 287.057, Florida Statutes. The Agency’s Authorized Official shall certify to the Department that the Agency’s purchase of commodities or contractual services has been accomplished in compliance with Section 287.057, Florida Statutes. It shall be the sole responsibility of the Agency to ensure that any obligations made in accordance with this Section comply with the current threshold limits. Contracts, purchase orders, task orders, construction change orders, or any other agreement that would result in exceeding the current budget contained in Exhibit "B", Schedule of Financial Assistance, or that is not consistent with the Project description and scope of services contained in Exhibit "A", Project Description and Responsibilities must be approved by the Department prior to Agency execution. Failure to obtain such approval, and subsequent execution of an amendment to the Agreement if required, shall be sufficient cause for nonpayment by the Department, in accordance with this Agreement.

c. Consultants’ Competitive Negotiation Act. It is understood and agreed by the Parties to this Agreement that participation by the Department in a project with the Agency, where said project involves a consultant contract for professional services, is contingent on the Agency’s full compliance with provisions of Section 287.055, Florida Statutes, Consultants’ Competitive Negotiation Act. In all cases, the Agency’s Authorized Official shall certify to the Department that selection has been accomplished in compliance with the Consultants’ Competitive Negotiation Act.

d. Disadvantaged Business Enterprise (DBE) Policy and Obligation. It is the policy of the Department that DBEs, as defined in 49 C.F.R. Part 26, as amended, shall have the opportunity to participate in the performance of contracts financed in whole or in part with Department funds under this Agreement. The DBE requirements of applicable federal and state laws and regulations apply to this Agreement. The Agency and its contractors agree to ensure that DBEs have the opportunity to participate in the performance of this Agreement. In this regard, all recipients and contractors shall take all necessary and reasonable steps in accordance with applicable federal and state laws and regulations to ensure that the DBEs have the opportunity to compete for and perform contracts. The Agency and its contractors and subcontractors shall not discriminate on the basis of race, color, national origin or sex in the award and performance of contracts, entered pursuant to this Agreement.

13. Maintenance Obligations. In the event the Project includes construction or the acquisition of commodities then the following provisions are incorporated into this Agreement:
a. The Agency agrees to accept all future maintenance and other attendant costs occurring after completion of the Project for all improvements constructed or commodities acquired as part of the Project. The terms of this provision shall survive the termination of this Agreement.

14. Sale, Transfer, or Disposal of Department-funded Property:

a. The Agency will not sell or otherwise transfer or dispose of any part of its title or other interests in real property, facilities, or equipment funded in any part by the Department under this Agreement without prior written approval by the Department.

b. If a sale, transfer, or disposal by the Agency of all or a portion of Department-funded real property, facilities, or equipment is approved by the Department, the following provisions will apply:

   i. The Agency shall reimburse the Department a proportional amount of the proceeds of the sale of any Department-funded property.

   ii. The proportional amount shall be determined on the basis of the ratio of the Department funding of the development or acquisition of the property multiplied against the sale amount, and shall be remitted to the Department within ninety (90) days of closing of sale.

   iii. Sale of property developed or acquired with Department funds shall be at market value as determined by appraisal or public bidding process, and the contract and process for sale must be approved in advance by the Department.

   iv. If any portion of the proceeds from the sale to the Agency are non-cash considerations, reimbursement to the Department shall include a proportional amount based on the value of the non-cash considerations.

c. The terms of provisions “a” and “b” above shall survive the termination of this Agreement.

   i. The terms shall remain in full force and effect throughout the useful life of facilities developed, equipment acquired, or Project items installed within a facility, but shall not exceed twenty (20) years from the effective date of this Agreement.

   ii. There shall be no limit on the duration of the terms with respect to real property acquired with Department funds.

15. Single Audit. The administration of Federal or State resources awarded through the Department to the Agency by this Agreement may be subject to audits and/or monitoring by the Department. The following requirements do not limit the authority of the Department to conduct or arrange for the conduct of additional audits or evaluations of Federal awards or State financial assistance or limit the authority of any state agency inspector general, the State of Florida Auditor General, or any other state official. The Agency shall comply with all audit and audit reporting requirements as specified below.

   Federal Funded:

   a. In addition to reviews of audits conducted in accordance with 2 CFR Part 200, Subpart F – Audit Requirements, monitoring procedures may include but not be limited to on-site visits by Department staff and/or other procedures, including reviewing any required performance and financial reports, following up, ensuring corrective action, and issuing management decisions on weaknesses found through audits when those findings pertain to Federal awards provided through the Department by this Agreement. By entering into this Agreement, the Agency agrees to comply and cooperate fully with any monitoring procedures/processes deemed appropriate by the Department. The Agency further agrees to comply and cooperate with any
inspections, reviews, investigations, or audits deemed necessary by the Department, State of Florida Chief Financial Officer (CFO), or State of Florida Auditor General.

b. The Agency, a non-Federal entity as defined by 2 CFR Part 200, Subpart F – Audit Requirements, as a subrecipient of a Federal award awarded by the Department through this Agreement, is subject to the following requirements:

i. In the event the Agency expends a total amount of Federal awards equal to or in excess of the threshold established by 2 CFR Part 200, Subpart F – Audit Requirements, the Agency must have a Federal single or program-specific audit conducted for such fiscal year in accordance with the provisions of 2 CFR Part 200, Subpart F – Audit Requirements. Exhibit “H”, Audit Requirements for Awards of Federal Financial Assistance, to this Agreement provides the required Federal award identification information needed by the Agency to further comply with the requirements of 2 CFR Part 200, Subpart F – Audit Requirements. In determining Federal awards expended in a fiscal year, the Agency must consider all sources of Federal awards based on when the activity related to the Federal award occurs, including the Federal award provided through the Department by this Agreement. The determination of amounts of Federal awards expended should be in accordance with the guidelines established by 2 CFR Part 200, Subpart F – Audit Requirements. An audit conducted by the State of Florida Auditor General in accordance with the provisions of 2 CFR Part 200, Subpart F – Audit Requirements, will meet the requirements of this part.

ii. In connection with the audit requirements, the Agency shall fulfill the requirements relative to the auditee responsibilities as provided in 2 CFR Part 200, Subpart F – Audit Requirements.

iii. In the event the Agency expends less than the threshold established by 2 CFR Part 200, Subpart F – Audit Requirements, in Federal awards, the Agency is exempt from Federal audit requirements for that fiscal year. However, the Agency must provide a single audit exemption statement to the Department at FDOTSingleAudit@dot.state.fl.us no later than nine months after the end of the Agency’s audit period for each applicable audit year. In the event the Agency expends less than the threshold established by 2 CFR Part 200, Subpart F – Audit Requirements, in Federal awards in a fiscal year and elects to have an audit conducted in accordance with the provisions of 2 CFR Part 200, Subpart F – Audit Requirements, the cost of the audit must be paid from non-Federal resources (i.e., the cost of such an audit must be paid from the Agency’s resources obtained from other than Federal entities).

iv. The Agency must electronically submit to the Federal Audit Clearinghouse (FAC) at https://harvester.census.gov/facweb/ the audit reporting package as required by 2 CFR Part 200, Subpart F – Audit Requirements, within the earlier of 30 calendar days after receipt of the auditor’s report(s) or nine months after the end of the audit period. The FAC is the repository of record for audits required by 2 CFR Part 200, Subpart F – Audit Requirements. However, the Department requires a copy of the audit reporting package also be submitted to FDOTSingleAudit@dot.state.fl.us within the earlier of 30 calendar days after receipt of the auditor’s report(s) or nine months after the end of the audit period as required by 2 CFR Part 200, Subpart F – Audit Requirements.

v. Within six months of acceptance of the audit report by the FAC, the Department will review the Agency’s audit reporting package, including corrective action plans and management letters, to the extent necessary to determine whether timely and appropriate action on all deficiencies has been taken pertaining to the Federal award provided through the Department by this Agreement. If the Agency fails to have an
audit conducted in accordance with 2 CFR Part 200, Subpart F – Audit Requirements, the Department may impose additional conditions to remedy noncompliance. If the Department determines that noncompliance cannot be remedied by imposing additional conditions, the Department may take appropriate actions to enforce compliance, which actions may include but not be limited to the following:

1. Temporarily withhold cash payments pending correction of the deficiency by the Agency or more severe enforcement action by the Department;
2. Disallow (deny both use of funds and any applicable matching credit for) all or part of the cost of the activity or action not in compliance;
3. Wholly or partly suspend or terminate the Federal award;
4. Initiate suspension or debarment proceedings as authorized under 2 C.F.R. Part 180 and Federal awarding agency regulations (or in the case of the Department, recommend such a proceeding be initiated by the Federal awarding agency);
5. Withhold further Federal awards for the Project or program;
6. Take other remedies that may be legally available.

vi. As a condition of receiving this Federal award, the Agency shall permit the Department or its designee, the CFO, or State of Florida Auditor General access to the Agency's records, including financial statements, the independent auditor's working papers, and project records as necessary. Records related to unresolved audit findings, appeals, or litigation shall be retained until the action is complete or the dispute is resolved.

vii. The Department's contact information for requirements under this part is as follows:

Office of Comptroller, MS 24
605 Suwannee Street
Tallahassee, Florida 32399-0450
FDOTSINGLEAUDIT@DOT.STATE.FL.US

State Funded:

a. In addition to reviews of audits conducted in accordance with Section 215.97, Florida Statutes, monitoring procedures to monitor the Agency’s use of state financial assistance may include but not be limited to on-site visits by Department staff and/or other procedures, including reviewing any required performance and financial reports, following up, ensuring corrective action, and issuing management decisions on weaknesses found through audits when those findings pertain to state financial assistance awarded through the Department by this Agreement. By entering into this Agreement, the Agency agrees to comply and cooperate fully with any monitoring procedures/processes deemed appropriate by the Department. The Agency further agrees to comply and cooperate with any inspections, reviews, investigations, or audits deemed necessary by the Department, the Department of Financial Services (DFS), or State of Florida Auditor General.

b. The Agency, a “nonstate entity” as defined by Section 215.97, Florida Statutes, as a recipient of state financial assistance awarded by the Department through this Agreement, is subject to the following requirements:

i. In the event the Agency meets the audit threshold requirements established by Section 215.97, Florida Statutes, the Agency must have a State single or project-specific audit conducted for such fiscal year in accordance with Section 215.97, Florida Statutes; applicable rules of the Department of Financial Services; and Chapters 10.550 (local governmental entities) or 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General. Exhibit “G”, Audit Requirements for Awards of State Financial Assistance, to this Agreement indicates state financial
assistance awarded through the Department by this Agreement needed by the Agency to further comply with the requirements of Section 215.97, Florida Statutes. In determining the state financial assistance expended in a fiscal year, the Agency shall consider all sources of state financial assistance, including state financial assistance received from the Department by this Agreement, other state agencies, and other nonstate entities. State financial assistance does not include Federal direct or pass-through awards and resources received by a nonstate entity for Federal program matching requirements.

ii. In connection with the audit requirements, the Agency shall ensure that the audit complies with the requirements of Section 215.97(8), Florida Statutes. This includes submission of a financial reporting package as defined by Section 215.97(2)(e), Florida Statutes, and Chapters 10.550 (local governmental entities) or 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General.

iii. In the event the Agency does not meet the audit threshold requirements established by Section 215.97, Florida Statutes, the Agency is exempt for such fiscal year from the state single audit requirements of Section 215.97, Florida Statutes. However, the Agency must provide a single audit exemption statement to the Department at FDOTSingleAudit@dot.state.fl.us no later than nine months after the end of the Agency’s audit period for each applicable audit year. In the event the Agency does not meet the audit threshold requirements established by Section 215.97, Florida Statutes, in a fiscal year and elects to have an audit conducted in accordance with the provisions of Section 215.97, Florida Statutes, the cost of the audit must be paid from the Agency’s resources (i.e., the cost of such an audit must be paid from the Agency’s resources obtained from other than State entities).

iv. In accordance with Chapters 10.550 (local governmental entities) or 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General, copies of financial reporting packages required by this Agreement shall be submitted to:

Florida Department of Transportation
Office of Comptroller, MS 24
605 Suwannee Street
Tallahassee, Florida 32399-0405
FDOTSingleAudit@dot.state.fl.us

And

State of Florida Auditor General
Local Government Audits/342
111 West Madison Street, Room 401
Tallahassee, FL 32399-1450
Email: flaudgen_localgovt@aud.state.fl.us

v. Any copies of financial reporting packages, reports, or other information required to be submitted to the Department shall be submitted timely in accordance with Section 215.97, Florida Statutes, and Chapters 10.550 (local governmental entities) or 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General, as applicable.

vi. The Agency, when submitting financial reporting packages to the Department for audits done in accordance with Chapters 10.550 (local governmental entities) or 10.650 (nonprofit and for-profit organizations), Rules of the Auditor General, should indicate the date the reporting package was delivered to the Agency in correspondence accompanying the reporting package.
vii. Upon receipt, and within six months, the Department will review the Agency's financial reporting package, including corrective action plans and management letters, to the extent necessary to determine whether timely and appropriate corrective action on all deficiencies has been taken pertaining to the state financial assistance provided through the Department by this Agreement. If the Agency fails to have an audit conducted consistent with Section 215.97, Florida Statutes, the Department may take appropriate corrective action to enforce compliance.

viii. As a condition of receiving state financial assistance, the Agency shall permit the Department or its designee, DFS, or the Auditor General access to the Agency's records, including financial statements, the independent auditor’s working papers, and project records as necessary. Records related to unresolved audit findings, appeals, or litigation shall be retained until the action is complete or the dispute is resolved.

c. The Agency shall retain sufficient records demonstrating its compliance with the terms of this Agreement for a period of five years from the date the audit report is issued and shall allow the Department or its designee, DFS, or State of Florida Auditor General access to such records upon request. The Agency shall ensure that the audit working papers are made available to the Department or its designee, DFS, or State of Florida Auditor General upon request for a period of five years from the date the audit report is issued, unless extended in writing by the Department.

16. Notices and Approvals. Notices and approvals referenced in this Agreement must be obtained in writing from the Parties’ respective Administrators or their designees.

17. Restrictions, Prohibitions, Controls and Labor Provisions:

   a. Convicted Vendor List. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity; may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

   b. Discriminatory Vendor List. In accordance with Section 287.134, Florida Statutes, an entity or affiliate who has been placed on the Discriminatory Vendor List, kept by the Florida Department of Management Services, may not submit a bid on a contract to provide goods or services to a public entity; may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and may not transact business with any public entity.

   c. Non-Responsible Contractors. An entity or affiliate who has had its Certificate of Qualification suspended, revoked, denied, or have further been determined by the Department to be a non-responsible contractor, may not submit a bid or perform work for the construction or repair of a public building or public work on a contract with the Agency.
d. **Prohibition on Using Funds for Lobbying.** No funds received pursuant to this Agreement may be expended for lobbying the Florida Legislature, judicial branch, or any state agency, in accordance with Section 216.347, Florida Statutes.

e. **Unauthorized Aliens.** The Department shall consider the employment by any contractor of unauthorized aliens a violation of Section 274A(e) of the Immigration and Nationality Act. If the contractor knowingly employs unauthorized aliens, such violation will be cause for unilateral cancellation of this Agreement.

f. **Procurement of Construction Services.** If the Project is procured pursuant to Chapter 255, Florida Statutes, for construction services and at the time of the competitive solicitation for the Project, 50 percent or more of the cost of the Project is to be paid from state-appropriated funds, then the Agency must comply with the requirements of Section 255.0991, Florida Statutes.

g. **E-Verify.** The Agency shall:

   i. Utilize the U.S. Department of Homeland Security’s E-Verify system to verify the employment eligibility of all new employees hired by the Agency during the term of the contract; and

   ii. Expressly require any subcontractors performing work or providing services pursuant to the state contract to likewise utilize the U.S. Department of Homeland Security’s E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term.

h. **Design Services and Construction Engineering and Inspection Services.** If the Project is wholly or partially funded by the Department and administered by a local governmental entity, except for a seaport listed in Section 311.09, Florida Statutes, the entity performing design and construction engineering and inspection services may not be the same entity.

18. **Indemnification and Insurance:**

   a. It is specifically agreed between the Parties executing this Agreement that it is not intended by any of the provisions of any part of this Agreement to create in the public or any member thereof, a third party beneficiary under this Agreement, or to authorize anyone not a party to this Agreement to maintain a suit for personal injuries or property damage pursuant to the terms or provisions of this Agreement. The Agency guarantees the payment of all just claims for materials, supplies, tools, or labor and other just claims against the Agency or any subcontractor, in connection with this Agreement. Additionally, to the extent permitted by law and as limited by and pursuant to the provisions of Section 768.28, Florida Statutes, the Agency shall indemnify and hold harmless the State of Florida, Department of Transportation, including the Department’s officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorney’s fees, to the extent caused by the negligence, recklessness, or intentional wrongful misconduct of the Agency and persons employed or utilized by the Agency in the performance of this Agreement. This indemnification shall survive the termination of this Agreement. Nothing contained in this paragraph is intended to nor shall it constitute a waiver of the State of Florida and the Agency’s sovereign immunity. Additionally, the Agency agrees to include the following indemnification in all contracts with contractors/subcontractors and consultants/subconsultants who perform work in connection with this Agreement:

   “To the fullest extent permitted by law, the Agency’s contractor/consultant shall indemnify and hold harmless the Agency and the State of Florida, Department of Transportation, including the Department’s officers and employees, from liabilities, damages, losses and costs,
including, but not limited to, reasonable attorney’s fees, to the extent caused by the negligence, recklessness or intentional wrongful misconduct of the contractor/consultant and persons employed or utilized by the contractor/consultant in the performance of this Agreement.

This indemnification shall survive the termination of this Agreement. Nothing contained in this paragraph is intended to nor shall it constitute a waiver of the State of Florida and the Agency’s sovereign immunity.”

b. The Agency shall provide Workers’ Compensation Insurance in accordance with Florida’s Workers’ Compensation law for all employees. If subletting any of the work, ensure that the subcontractor(s) and subconsultant(s) have Workers’ Compensation Insurance for their employees in accordance with Florida’s Workers’ Compensation law. If using “leased employees” or employees obtained through professional employer organizations (“PEO’s”), ensure that such employees are covered by Workers’ Compensation Insurance through the PEO’s or other leasing entities. Ensure that any equipment rental agreements that include operators or other personnel who are employees of independent contractors, sole proprietors, or partners are covered by insurance required under Florida’s Workers’ Compensation law.

c. If the Agency elects to self-perform the Project, then the Agency may self-insure. If the Agency elects to hire a contractor or consultant to perform the Project, then the Agency shall carry, or cause its contractor or consultant to carry, Commercial General Liability insurance providing continuous coverage for all work or operations performed under this Agreement. Such insurance shall be no more restrictive than that provided by the latest occurrence form edition of the standard Commercial General Liability Coverage Form (ISO Form CG 00 01) as filed for use in the State of Florida. The Agency shall cause, or cause its contractor or consultant to cause, the Department to be made an Additional Insured as to such insurance. Such coverage shall be on an “occurrence” basis and shall include Products/Completed Operations coverage. The coverage afforded to the Department as an Additional Insured shall be primary as to any other available insurance and shall not be more restrictive than the coverage afforded to the Named Insured. The limits of coverage shall not be less than $1,000,000 for each occurrence and not less than a $5,000,000 annual general aggregate, inclusive of amounts provided by an umbrella or excess policy. The limits of coverage described herein shall apply fully to the work or operations performed under the Agreement, and may not be shared with or diminished by claims unrelated to the Agreement. The policy/ies and coverage described herein may be subject to a deductible and such deductibles shall be paid by the Named Insured. No policy/ies or coverage described herein may contain or be subject to a Retention or a Self-Insured Retention unless the Agency is a state agency or subdivision of the State of Florida that elects to self-perform the Project. Prior to the execution of the Agreement, and at all renewal periods which occur prior to final acceptance of the work, the Department shall be provided with an ACORD Certificate of Liability Insurance reflecting the coverage described herein. The Department shall be notified in writing within ten days of any cancellation, notice of cancellation, lapse, renewal, or proposed change to any policy or coverage described herein. The Department’s approval or failure to disapprove any policy/ies, coverage, or ACORD Certificates shall not relieve or excuse any obligation to procure and maintain the insurance required herein, nor serve as a waiver of any rights or defenses the Department may have.

d. When the Agreement includes the construction of a railroad grade crossing, railroad overpass or underpass structure, or any other work or operations within the limits of the railroad right-of-way, including any encroachments thereon from work or operations in the vicinity of the railroad right-of-way, the Agency shall, or cause its contractor to, in addition to the insurance coverage required above, procure and maintain Railroad Protective Liability Coverage (ISO Form CG 00 35) where the railroad is the Named Insured and where the limits are not less than $2,000,000 combined single limit for bodily injury and/or property damage per
occurrence, and with an annual aggregate limit of not less than $6,000,000. The railroad shall also be added along with the Department as an Additional Insured on the policy/ies procured pursuant to the paragraph above. Prior to the execution of the Agreement, and at all renewal periods which occur prior to final acceptance of the work, both the Department and the railroad shall be provided with an ACORD Certificate of Liability Insurance reflecting the coverage described herein. The insurance described herein shall be maintained through final acceptance of the work. Both the Department and the railroad shall be notified in writing within ten days of any cancellation, notice of cancellation, renewal, or proposed change to any policy or coverage described herein. The Department's approval or failure to disapprove any policy/ies, coverage, or ACORD Certificates shall not relieve or excuse any obligation to procure and maintain the insurance required herein, nor serve as a waiver of any rights the Department may have.

e. When the Agreement involves work on or in the vicinity of utility-owned property or facilities, the utility shall be added along with the Department as an Additional Insured on the Commercial General Liability policy/ies procured above.

19. Miscellaneous:

a. **Environmental Regulations.** The Agency will be solely responsible for compliance with all applicable environmental regulations and for any liability arising from non-compliance with these regulations, and will reimburse the Department for any loss incurred in connection therewith.

b. **Non-Admission of Liability.** In no event shall the making by the Department of any payment to the Agency constitute or be construed as a waiver by the Department of any breach of covenant or any default which may then exist on the part of the Agency and the making of such payment by the Department, while any such breach or default shall exist, shall in no way impair or prejudice any right or remedy available to the Department with respect to such breach or default.

c. **Severability.** If any provision of this Agreement is held invalid, the remainder of this Agreement shall not be affected. In such an instance, the remainder would then continue to conform to the terms and requirements of applicable law.

d. **Agency not an agent of Department.** The Agency and the Department agree that the Agency, its employees, contractors, subcontractors, consultants, and subconsultants are not agents of the Department as a result of this Agreement.

e. **Bonus or Commission.** By execution of the Agreement, the Agency represents that it has not paid and, also agrees not to pay, any bonus or commission for the purpose of obtaining an approval of its application for the financing hereunder.

f. **Non-Contravention of State Law.** Nothing in the Agreement shall require the Agency to observe or enforce compliance with any provision or perform any act or do any other thing in contravention of any applicable state law. If any of the provisions of the Agreement violate any applicable state law, the Agency will at once notify the Department in writing so that appropriate changes and modifications may be made by the Department and the Agency to the end that the Agency may proceed as soon as possible with the Project.

g. **Execution of Agreement.** This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which shall constitute the same Agreement. A facsimile or electronic transmission of this Agreement with a signature on behalf of a party will be legal and binding on such party.
h. Federal Award Identification Number (FAIN). If the FAIN is not available prior to execution of the Agreement, the Department may unilaterally add the FAIN to the Agreement without approval of the Agency and without an amendment to the Agreement. If this occurs, an updated Agreement that includes the FAIN will be provided to the Agency and uploaded to the Department of Financial Services’ Florida Accountability Contract Tracking System (FACTS).

i. Inspector General Cooperation. The Agency agrees to comply with Section 20.055(5), Florida Statutes, and to incorporate in all subcontracts the obligation to comply with Section 20.055(5), Florida Statutes.

j. Law, Forum, and Venue. This Agreement shall be governed by and construed in accordance with the laws of the State of Florida. In the event of a conflict between any portion of the contract and Florida law, the laws of Florida shall prevail. The Agency agrees to waive forum and venue and that the Department shall determine the forum and venue in which any dispute under this Agreement is decided.

IN WITNESS WHEREOF, the Parties have executed this Agreement on the day and year written above.

AGENCY  the Village of Indiantown  
By: ____________________________  
Name: ____________________________  
Title: ____________________________  

STATE OF FLORIDA, DEPARTMENT OF TRANSPORTATION  
By: ____________________________  
Name: Steven C. Braun, P.E.  
Title: Director of Transportation Development  

STATE OF FLORIDA, DEPARTMENT OF TRANSPORTATION  
Legal Review: ____________________________  

EXHIBIT A

Project Description and Responsibilities

A. Project Description (description of Agency’s project to provide context, description of project components funded via this Agreement (if not the entire project)): operating funding for the Indiantown Saturday Shuttle Service - Years 1 and 2 of 3

B. Project Location (limits, city, county, map): Martin County, FL

C. Project Scope (allowable costs: describe project components, improvement type/service type, approximate timeline, project schedule, project size): “Service Development Projects specifically include projects involving the use of new technologies, services, routes, or vehicle frequencies; the purchase of special transportation services, and other such techniques for increasing service to the riding public as are applicable to specific localities and transit user groups. Projects involving the application of new technologies or methods for improving operations, maintenance, and marketing in public transit systems can be funded through the Service Development program. Eligible capital costs are any costs that would be defined as capital costs by the Federal Transit Administration. Examples would include, but not be limited to: the acquisition of buses for fleet and service expansions; transfer facilities; intermodal terminals and park and ride facilities; and passenger amenities, such as passenger shelters and bus stop signs. Eligible net operating costs are all operating costs of a project; less any federal funds, fares, or other sources of income to the project.”

D. Deliverable(s): transit service

The project scope identifies the ultimate project deliverables. Deliverables for requisition, payment and invoice purposes will be the incremental progress made toward completion of project scope elements. Supporting documentation will be quantifiable, measurable, and verifiable, to allow for a determination of the amount of incremental progress that has been made, and provide evidence that the payment requested is commensurate with the accomplished incremental progress and costs incurred by the Agency.

E. Unallowable Costs (including but not limited to): candy, alcohol, decorations, greeting-cards, lobbying, personal cell phone, office parties, entertainment, food, fans, coffee pots, portable heaters, refrigerators, microwave ovens, congratulatory telegrams, refreshments, banquets, catering, gifts, flowers, or promotional items

F. Transit Operating Grant Requirements (Transit Only):

Transit Operating Grants billed as an operational subsidy will require an expenditure detail report from the Agency that matches the invoice period. The expenditure detail, along with the progress report, will be the required deliverables for Transit Operating Grants.
## EXHIBIT B

### Schedule of Financial Assistance

**TRANSIT OPERATING ONLY**

Funds awarded to the agency pursuant to this agreement consist of the following:

### A. Fund Type and Fiscal Year:

<table>
<thead>
<tr>
<th>Financial Project Number</th>
<th>Fund Type</th>
<th>FLAIR Category</th>
<th>State Fiscal Year</th>
<th>Object Code</th>
<th>CSFA/CFDA Number</th>
<th>CSFA/CFDA Title or Funding Source Description</th>
<th>Funding Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>446657-1-84-01</td>
<td>DDR</td>
<td>088774</td>
<td>2020</td>
<td>751000</td>
<td>55.012</td>
<td>Public Transit Service Development</td>
<td>$25,000</td>
</tr>
<tr>
<td>446657-1-84-01</td>
<td>LF</td>
<td></td>
<td>2020</td>
<td></td>
<td></td>
<td></td>
<td>$25,000</td>
</tr>
</tbody>
</table>

**Total Financial Assistance** $50,000

### B. Operations Phase - Estimate of Project Costs by Budget Category:

<table>
<thead>
<tr>
<th>Budget Categories (Operations (Transit Only))</th>
<th>State</th>
<th>Local</th>
<th>Federal</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Contractual Services</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$0</td>
<td>$50,000</td>
</tr>
<tr>
<td>Travel</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Other Direct Costs</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>$25,000</strong></td>
<td><strong>$25,000</strong></td>
<td><strong>$0</strong></td>
<td><strong>$50,000</strong></td>
</tr>
</tbody>
</table>

* Budget category amounts are estimates and can be shifted between items without amendment (because they are all within the Operations Phase).

### C. Cost Reimbursement

The Agency will submit invoices for cost reimbursement on a:

- Monthly
- **X** Quarterly
- **_** Other:

basis upon the approval of the deliverables including the expenditure detail provided by the Agency.

**BUDGET/COST ANALYSIS CERTIFICATION AS REQUIRED BY SECTION 216.3475, FLORIDA STATUTES:**

I certify that the cost for each line item budget category has been evaluated and determined to be allowable, reasonable, and necessary as required by Section 216.3475, Florida Statutes. Documentation is on file evidencing the methodology used and the conclusions reached.

Jayne A. Pietrowski  
Department Grant Manager Name

Signature ___________________________ Date ___________________________
STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION
PUBLIC TRANSPORTATION
GRANT AGREEMENT EXHIBITS

EXHIBIT D
AGENCY RESOLUTION

PLEASE SEE ATTACHED
EXHIBIT E
PROGRAM SPECIFIC TERMS AND CONDITIONS – TRANSIT

(Service Development)

1. **Conformance with Enabling Legislation.** This Agreement is in conformance with Section 341.051, F.S.

2. **Bus Transit System.** In accordance with Section 341.061, F.S., and Rule Chapter 14-90, Florida Administrative Code, the Agency shall submit and the Department shall have on file, an annual safety certification that the Agency has adopted and is complying with its adopted System Safety Program Plan pursuant to Rule Chapter 14-90, F.A.C., and has performed annual safety inspections of all buses operated.

3. **Transit Vehicle Inventory Management.** The agency will follow the Department’s Transit Vehicle Inventory Management Procedure (725-030-025i), which outlines the requirements for continuing management control, inventory transfer and disposal actions. This procedure pertains ONLY to capital procurements of rolling stock using the FTA Section 5310, Section 5311, Section 5316, and Section 5317 programs as the funding source, or where the Department participates in 50% or more of the public transit vehicle’s purchase price. This may include vehicles purchased under the State Transit Block Grant Program, State Transit Corridor Program, State Transit Service Development Program, or other applicable Department programs.

4. **Progress Reports.** The Agency will submit Semi-Annual Progress Reports on monthly ridership data. Reports are due no later than January 30th for the period ending December 31st and July 30th for the period ending June 30th.

5. **Project Goals and Service Data.** The Agency must report on work efforts and provide a detailed, side-by-side comparison of the project goals and actual service data.

6. **Submittal of Proposed Timeline.** The Agency will submit a Proposed Time Line for Service Development Activities prior to the commencement of the project.

7. **Final Report.** At any time when it becomes necessary to terminate the project or at the end of the two years, a Final Report will be submitted by the Agency. This report will accompany the Final Invoice for reimbursement. The Final Report will include the following:

   a) An evaluation of the attainment of the goals and objectives.

   b) The reasons any of the goals were not met.

   c) The benefit accrued by the Agency.

   d) A statement of the Agency’s intent to continue with the service demonstrated.

--- End of Exhibit E ---
Invoices for cost reimbursement contracts must be supported by an itemized listing of expenditures by category (salary, travel, expenses, etc.). Supporting documentation shall be submitted for each amount for which reimbursement is being claimed indicating that the item has been paid. Documentation for each amount for which reimbursement is being claimed must indicate that the item has been paid. Check numbers may be provided in lieu of copies of actual checks. Each piece of documentation should clearly reflect the dates of service. Only expenditures for categories in the approved agreement budget may be reimbursed. These expenditures must be allowable (pursuant to law) and directly related to the services being provided.

Listed below are types and examples of supporting documentation for cost reimbursement agreements:

1. Salaries: A payroll register or similar documentation should be submitted. The payroll register should show gross salary charges, fringe benefits, other deductions and net pay. If an individual for whom reimbursement is being claimed is paid by the hour, a document reflecting the hours worked times the rate of pay will be acceptable.

2. Fringe Benefits: Fringe Benefits should be supported by invoices showing the amount paid on behalf of the employee (e.g., insurance premiums paid). If the contract specifically states that fringe benefits will be based on a specified percentage rather than the actual cost of fringe benefits, then the calculation for the fringe benefits amount must be shown.

Exception: Governmental entities are not required to provide check numbers or copies of checks for fringe benefits.

3. Travel: Reimbursement for travel must be in accordance with Section 112.061, Florida Statutes, which includes submission of the claim on the approved State travel voucher or electronic means.

4. Other direct costs: Reimbursement will be made based on paid invoices/receipts. If nonexpendable property is purchased using State funds, the contract should include a provision for the transfer of the property to the State when services are terminated. Documentation must be provided to show compliance with Department of Management Services Rule 60A-1.017, Florida Administrative Code, regarding the requirements for contracts which include services and that provide for the contractor to purchase tangible personal property as defined in Section 273.02, Florida Statutes, for subsequent transfer to the State.

5. In-house charges: Charges which may be of an internal nature (e.g., postage, copies, etc.) may be reimbursed on a usage log which shows the units times the rate being charged. The rates must be reasonable.

6. Indirect costs: If the contract specifies that indirect costs will be paid based on a specified rate, then the calculation should be shown.

Contracts between state agencies, and/or contracts between universities may submit alternative documentation to substantiate the reimbursement request that may be in the form of FLAIR reports or other detailed reports.

The Florida Department of Financial Services, online Reference Guide for State Expenditures can be found at this web address http://www.myfloridacfo.com/Division/AA/Manuals/Auditing/Reference_Guide_For_State_Expenditures.pdf.
STATE OF FLORIDA DEPARTMENT OF TRANSPORTATION
PUBLIC TRANSPORTATION
GRANT AGREEMENT EXHIBITS

EXHIBIT G

STATE FINANCIAL ASSISTANCE (FLORIDA SINGLE AUDIT ACT)

THE STATE RESOURCES AWARDED PURSUANT TO THIS AGREEMENT CONSIST OF THE FOLLOWING:

SUBJECT TO SECTION 215.97, FLORIDA STATUTES:~

Awarding Agency: Florida Department of Transportation
State Project Title: Public Transit Service Development Program
   CSFA Number: 55.012
   *Award Amount: $25,000

*The award amount may change with amendments

Specific project information for CSFA Number 55.012 is provided at: https://apps.fldfs.com/fsaa/searchCatalog.aspx

COMPLIANCE REQUIREMENTS APPLICABLE TO STATE RESOURCES AWARDED PURSUANT TO THIS AGREEMENT:

State Project Compliance Requirements for CSFA Number 55.012 are provided at: https://apps.fldfs.com/fsaa/searchCompliance.aspx

The State Projects Compliance Supplement is provided at: https://apps.fldfs.com/fsaa/compliance.aspx
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting


SUMMARY OF ITEM: This item provides for piggyback of the Asphalt Paving Systems, Inc. contract with Lee County, Florida, dated September 15, 2017, and extended on August 13, 2019, for alternative paving methods. This item also authorizes the Village Manager to execute Work Order No. 2020-01 with Asphalt Paving Systems in the amount of $136,621.27 to provide crack sealing, micro surface treatment, and restriping of select roads in Pavement Maintenance Zones 1 and 3.

RECOMMENDATION: Staff recommends authorization of the piggyback agreement and Work Order No. 2020-01.

PREPARED BY: William Archebelle, Public Works Director

DATE: 2/5/2020

ATTACHMENTS:
Description
Asphalt Paving Systems Proposal
Piggyback Agreement
Work Assignment
Lee County Contract
Lee County Contract Renewal
TO:  Indian Town Public Works  
FROM:  Asphalt Paving Systems, Inc.  
        Kris Shane - East Coast Florida Rep  
        9021 Wire Road  
        Zephyrhills, FL 33540  
        Ph: 813-480-1865  

Remove 153rd  

RE:  PROPOSAL UNIT PRICES ARE IN ACCORDANCE WITH LEE COUNTY BID SOLICITATION B170265/ANB  

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Units</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Price</th>
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</thead>
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<td>Lee County Contract</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Micro-Surfacing</td>
<td></td>
<td></td>
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<tr>
<td>APM-002</td>
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<tr>
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<td>$ 20.00</td>
<td>$18,880.00</td>
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<td>711-10</td>
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<td>PAINTED FM</td>
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</tr>
<tr>
<td>710-4</td>
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<td>$ 4.50</td>
<td>$1,651.50</td>
</tr>
<tr>
<td>Thermoplastic FM</td>
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<td></td>
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<tr>
<td>711-1</td>
<td>6&quot; Solid Stripe/Extra. Thermo</td>
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<td>$ 1.25</td>
<td>$3,331.25</td>
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<td>711-2</td>
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<td>$ 4.50</td>
<td>$5,355.00</td>
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<tr>
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<td>$ 5.25</td>
<td>$1,926.75</td>
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<td>1.00</td>
<td>$ 6,210.06</td>
<td>$6,210.06</td>
</tr>
<tr>
<td>102-1</td>
<td>Maintenance of Traffic</td>
<td>5%</td>
<td>1.00</td>
<td>$ 6,210.06</td>
<td>$6,210.06</td>
</tr>
</tbody>
</table>

**Quantities taken from plans/bid sheets**

Total $136,621.27

Respectfully Submitted,

Kris Shane  
Asphalt Paving Systems, Inc.  
Zephyrhills, Florida  
c: 813-480-1865  
e: k.shaneaps@gmail.com

Accepted By: ______________________
Signature: ______________________
Date: ______________________

* Proposal valid for 30 days.
**Project Street list**

<table>
<thead>
<tr>
<th>ITEM</th>
<th>STREET NAME</th>
<th>FROM</th>
<th>TO</th>
<th>LENGTH</th>
<th>WIDTH</th>
<th>TOTAL UNITS</th>
<th>UNIT PRICE</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>See Plans and Map</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

|      |      | 0.00 | 0  |        |       |             |            | $0.00 |

Asphalt Paving Systems, Inc.
Kris Shane - South Florida Rep
Zephyrhills, FL 33540
Ph: 813-480-1865
PIGGYBACK AGREEMENT FOR ALTERNATIVE PAVING METHODS

THIS AGREEMENT made this ____ day of January, 2020, by and between the Village of Indiantown, Florida, a municipal corporation of the State of Florida, P.O. Box 398, 16550 SW Warfield Blvd., Indiantown, FL 34956-0398, hereinafter the “Owner”, and Asphalt Paving Systems, Inc., a New Jersey corporation authorized to do business in Florida, hereinafter “Contractor” with its principal address at 9021 Wire Road, Zephyrhills, FL 33540.

WITNESSETH:

WHEREAS, Lee County, Florida (“LCF”) accepted Contractor’s bid for Alternative Paving Methods, pursuant to Solicitation No. B170265/ANB (“Alternative Paving Methods”), by Agreement with an effective date of September 5, 2017, and renewed through September 4, 2020 (“LCF Agreement”), all pursuant to a competitive public bidding process by LCF (the “LCF Bid”); and

WHEREAS, the LCF Bid package and LCF Agreement included formal contract documents binding upon the successful bidder (the “LCF Contract Documents”); and

WHEREAS, the Owner desires to obtain the services set forth in the LCF Bid and LCF Contract Documents; and

WHEREAS, as the services involved in the LCF Contract Documents with Contractor are substantially the same as the services desired by Owner, Owner elects to utilize the competitively bid contract process administered by LCF in the LCF Bid, and Owner and Contractor wish to adopt the LCF Contract Documents, with certain minor modifications as further described herein.

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

I. RECITALS

The foregoing recitals are true and are hereby made a part of this Agreement.

II. AMENDMENTS

The LCF Bid and the LCF Contract Documents are incorporated into this Agreement and is deemed to be a part of this Agreement as modified as follows:

1. General. Where provisions of the LCF Bid and the LCF Contract Documents refer to “Lee County”, “County”, or “Board of County Commissioners” as the owner/contracting party, such references shall be replaced with “Village of Indiantown, Florida.” Where provisions of the LCF Agreement refer to “Agreement” or “Contract”, it shall refer to the
LCF Agreement as modified by this Agreement. Where the provisions of the LCF Contract Documents refer to the LCF “Purchasing Department”, it shall refer to the Village Manager, or designee.

2. Term. The term of this Agreement is three (3) years. The Agreement may be renewed for such additional terms as provided in the LCF Contract Documents, upon mutual agreement of both parties.

3. Unit Prices. The unit prices set forth in the LCF Bid and the LCF Contract Documents shall be applicable during the term of this Agreement.

4. Project Purchase Orders.

   A. No services provided under this Agreement shall be authorized upon execution of the Agreement. The Owner shall initiate work assignments by providing Contractor with a written “Work Assignments”.

   B. Each Work Assignment will set forth, among other things, the following:
      i. The scope of services requested;
      ii. Any deliverables;
      iii. The time and schedule of performance;
      iv. The method and amount of compensation based upon the unit prices set forth in Section 3 above;
      v. Any modifications to this Agreement, if mutually agreed upon by the parties.

   C. The services to be rendered by Contractor shall commence subsequent to the execution of each Work Assignment. Contractor’s work shall be performed, completed and submitted to Owner as specified in the Work Assignment.

   D. Each Work Assignment will be sequentially numbered and shall be subject to Owner’s approval prior to a Notice-to-Proceed being issued. The terms and conditions of this Agreement shall be incorporated within and made a part of each Work Assignment.

   E. The requirement under the LCF Bid and LCF Contract Documents that certain projects must be quoted by a minimum of three approved firms under Solicitation No. B170265/ANB is hereby deleted.

5. Invoices. Applications for payments under the Agreement shall be submitted to the following:

   Village Manager
   Village of Indiantown
6. No Other Amendments. Except as set forth herein, the Agreement is not amended. In the event of any conflict between the terms of this Agreement and the terms of the LCF Contract Documents, the terms of this Agreement shall prevail.

III. MISCELLANEOUS

The following miscellaneous provisions are incorporated into this Agreement.

7. Notice. All notices and other communications required in connection with this Agreement shall be in writing unless otherwise specified herein, and any notice or other communication required hereunder shall be faxed and mailed to the address set forth below, and shall be deemed delivered three (3) business days after the deposit of the mailed notice thereof in any main or branch office of the United States Post Office, certified or registered mail, return receipt requested, postage prepaid, properly addressed to the parties respectively as follows:

For notices and communications to the Town:

Village Manager
Village of Indiantown
P.O. Box 398
Indiantown, FL 34956-0398

For notices and communications to Contractor:

Asphalt Paving Systems, Inc.
9021 Wire Road
Zephyrhills, FL 33540

By notice complying with the foregoing requirements of this section, each party shall have the right to change the address or addressee or both for all future notices and communications to such party, but no notice of a change of address shall be effective until actually received.

8. Captions. The titles or captions contained in this Agreement are inserted only as a matter of convenience and for reference, and such captions in no way define, limit, extend or describe the scope of this Agreement or the intent of any provision hereof.

9. Severability. If any provision of this Agreement or the application thereof to any person or circumstances shall be held by a court of competent jurisdiction to be invalid or unenforceable to any extent, the remaining
provisions of this Agreement and the validity, enforceability, and application of such provisions to other persons or circumstances shall not be impaired thereby, but such remaining provisions of this Agreement shall be interpreted, applied and enforced so as to achieve, as near as may be, the purposes and intent of this Agreement to the greatest extent permitted by applicable law.

10. **Waiver.** Unless otherwise specifically provided herein, no delay or failure to exercise a right resulting from any breach of this Agreement shall impair such right or shall be construed to be a waiver thereof, but such right may be exercised from time to time and as often as may be deemed expedient. Any waiver shall be in writing and signed by the party granting such waiver. In any representation, warranty, or covenant by the other party, such waiver shall be limited to the particular breach so waived and shall not be deemed to waive any other breach under this Agreement.

11. **Conflict of Interest.** Contractor represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance of services required hereunder, as provided for in Florida Statutes 112.311 and as may be amended from time to time. Contractor further represents that no person having any interest shall be employed for said performance.

12. **Warranties and Representations.** Contractor restates, and makes current to the date of this Agreement, and incorporates in this Agreement, the warranties and representations in the LCF Agreement. Prior to performance of any work under this Agreement and as a condition precedent to this Agreement, Contractor shall provide Owner a current Certificate of Corporate Principal, a current Sworn Statement under Section 287.133(3)(a), Florida Statutes, on Public Entity Crimes, a current Certificate of Liability Insurance, a current State of Florida license certification, and a current Bidder’s Qualifications Statement/Statement of Business Organization.

13. **Termination.** Owner may terminate this Agreement upon seven (7) days written notice to Contractor.

14. **Allotment of Deliveries To The Contractor.** Owner, through its designated representative, shall, in its sole discretion, issue Work Assignments to Contractor as deemed in the best interests of Owner. The Agreement in no way guarantees any future Work Assignments. Owner retains the right to utilize other contractors or otherwise bid and execute procurements. Contractor shall have no right to appeal or challenge Owner’s decision regarding distribution of Work Assignments.
15. **Venue.** The parties agree to exclusive venue for any disputes arising under this Agreement in the Circuit Court in and for Martin County, Florida.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed as of the date and year first above written.

ASPHALT PAVING SYSTEMS, INC.

By: ____________________________
    Its Authorized Representative

Print Name: ______________________

Title: __________________________

ATTEST: VILLAGE OF INDIANTOWN

SUSAN A. OWENS, MPA, CLERK   GUYTON STONE, MAYOR

APPROVED AS TO FORM AND LEGAL SUFFICIENCY:

______________________________
WADE C. VOSE, VILLAGE ATTORNEY
WORK ASSIGNMENT
MICROSURFACING ZONES 1 AND 3
(Piggyback Lee County Solicitation No. B170265/ABN, Contract No. C-7804)
WORK ORDER No. 2020-1

This Work Assignment is entered into pursuant to that certain Piggyback Agreement for Alternative Paving Methods ("Contract") between the Village of Indiantown ("Village") and Asphalt Paving Systems, Inc. ("Contractor") dated February 13, 2020. This Work Assignment provides for a scope and budget for completion of the crack filling, micro surfacing, and restriping of selected streets in Zones 1 and 3 in the Village of Indiantown. Contractor hereby agrees to provide the services specified on Exhibit "A", under the terms and conditions and at a cost of $136,621.27 all as more specifically described in Exhibit "A", attached hereto and incorporated by reference. The terms of the Contract shall be deemed to be incorporated in the Work Assignment as if fully set forth herein.

Notice to Proceed Date: February 17, 2020
Substantial Completion Time: 60 calendar days
Final Completion Time: 75 calendar days
Liquidated Damages: $150 per day

IN WITNESS WHEREOF, the Village and the Contractor have executed this work assignment effective this _______ day of __________________________, 20__.

ASPHALT PAVING SYSTEMS, INC.                                       VILLAGE COUNCIL
VILLAGE OF INDIANTOWN, FLORIDA

__________________________                                        ____________________________
Name: Robert Capoferrer                                             Guyton Stone, Mayor
Title: President

A Payment and Performance Bond for all jobs over $200,000 is required to be recorded with the Martin County Clerk of the Circuit Court before commencement of work per F.S. 255.05
AGREEMENT FOR
ALTERNATIVE PAVING METHODS

THIS AGREEMENT FOR ONGOING ALTERNATIVE PAVING PROJECTS ("Agreement") is made and entered into as of the date of execution by both parties, by and between Lee County, a political subdivision of the State of Florida, hereinafter referred to as the "County" and Asphalt Paving Systems, Inc., a New Jersey corporation authorized to do business in the State of Florida, whose address is 9021 Wire Road, Zephyrhills, FL 33540, and whose Federal tax identification number is 22-3787755, hereinafter referred to as "Contractor".

WITNESSETH

WHEREAS, the County intends to purchase construction services related to Alternative Paving Methods from the Contractor for specific projects as determined by the County (the "Purchase"); and,

WHEREAS, the County issued a solicitation, B170265/ANB on April 7, 2017; and,

WHEREAS, the County evaluated the responses received and found the Contractor qualified to provide the necessary products and services; and,

WHEREAS, the County posted a Notice of Intended Decision Bid Action on June 6, 2017; and,

WHEREAS, the Contractor is one of a pool of firms approved to provide products and services for the Purchase, the County shall award projects as needed, and the Contractor understands and agrees that no work is guaranteed under this Agreement; and,

WHEREAS, the Contractor has reviewed the products and services to be supplied pursuant to this Agreement and is qualified, willing and able to provide all such products and services in accordance with its terms.

NOW, THEREFORE, the County and the Contractor, in consideration of the mutual covenants contained herein, do agree as follows:

I. PRODUCTS AND SERVICES

   A. The Contractor agrees to diligently provide all products and services for the Purchase in accordance with the Scope of Services made part of this Agreement as Exhibit A, attached hereto and incorporated herein. Contractor shall comply strictly with all of the terms and conditions of B170265/ANB, a copy of which is on file with the County’s Department of Procurement Management and is deemed incorporated into this Agreement.
II. **TERM AND DELIVERY**

A. This Agreement shall commence immediately upon execution by both the County and the Contractor, and shall continue for a period of one (1) year on an “as needed” basis. The Agreement may be renewed for up to three (3) additional one (1) year periods upon mutual written agreement of the County and the Contractor.

B. A Purchase Order must be issued by the County before commencement of any work or purchase of any goods related to this Agreement.

C. Products and services must be delivered in accordance with Supplemental Task Authorizations and Change Orders. The schedule must commence on the date of the purchase order.

III. **COMPENSATION AND PAYMENT**

A. The County must pay the Contractor in accordance with the terms and conditions of this Agreement for providing all products and services as set forth in Exhibit A, and further described in Exhibit B, Fee Schedule, attached hereto and incorporated herein. Said total amount to be all inclusive of costs necessary to provide all products and services as outlined in this Agreement, and as supported by the Contractor’s submittal in response to B170265/ANB, a copy of which is on file with the County’s Department of Procurement Management and is deemed incorporated into this Agreement.

B. Notwithstanding the preceding, Contractor must not make any deliveries or perform any work under this Agreement until receipt of a purchase order from the County. Contractor acknowledges and agrees that no minimum order or amount of product or work is guaranteed under this Agreement and County may elect to issue no purchase orders. If a purchase order is issued, the County reserves the right to amend, reduce, or cancel the purchase order in its sole discretion.

C. All funds for payment by the County under this Agreement are subject to the availability of an annual appropriation for this purpose by the County. In the event of nonappropriation of funds by the County for the services provided under this Agreement, the County will terminate the contract, without termination charge or other liability, on the last day of the then current fiscal year or when the appropriation made for the then-current year for the services covered by this Agreement is spent, whichever event occurs first. If at any time funds are not appropriated for the continuance of this Agreement, cancellation shall be accepted by the Contractor on fifteen (15) days’ prior written notice, but failure to give such notice will be of no effect and the County will not be obligated under this Agreement beyond the date of termination.
IV. METHOD OF PAYMENT

A. The County must pay the Contractor in accordance with the Local Government Prompt Payment Act, §218.70, et seq. F.S., as amended from time to time, upon receipt of the Contractor’s invoice and written approval of same by the County indicating that the products and services have been provided in conformity with this Agreement.

B. The Contractor must submit an invoice for payment to the address indicated on the purchase order on a monthly basis for those specific products and services as described in Exhibit A (and the corresponding fees as described in Exhibit B) that were provided during that invoicing period.

C. For partial shipments or deliveries, progress payments must be paid monthly in proportion to the percentage of products and services delivered on those specific line items as approved in writing by the County.

V. ADDITIONAL PURCHASES

A. No changes to this Agreement or the performance contemplated hereunder will be made unless the same are in writing and signed by both the Contractor and the County.

B. If the County requires the Contractor to perform additional services or provide additional product(s) related to this Agreement, then the Contractor shall be entitled to additional compensation based on the Fee Schedule as amended to the extent necessary to accommodate such additional work or product(s). The additional compensation must be agreed upon before commencement of any additional services or provision of additional product(s) and must be incorporated into this Agreement by written amendment. The County will not pay for any additional service, work performed or product provided before a written amendment to this Agreement.

Notwithstanding the preceding, in the event additional services are required as a result of error, omission or negligence of the Contractor, the Contractor will not be entitled to additional compensation.

VI. LIABILITY OF CONTRACTOR

A. The Contractor will indemnify and hold harmless Lee County Government from liabilities, damages, losses, and costs, including but not limited to attorney’s reasonable fees to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the Contractor and persons employed or utilized by the Contractor in the performance of this Agreement.
B. This section shall survive the termination or expiration of this Agreement.

VII. CONTRACTOR’S INSURANCE

A. Contractor must procure and maintain insurance as specified in Exhibit C, Insurance Requirements, attached hereto and made a part of this Agreement.

B. Contractor must, on a primary basis and at its sole expense, maintain in full force and effect, at all times during the life of this Agreement, insurance coverage (including endorsements) and limits as described in Exhibit C. These requirements, as well as the County’s review or acceptance of insurance maintained by Contractor, are not intended to and must not in any manner limit or qualify the liabilities or obligations assumed by Contractor under this Agreement. Insurance carriers providing coverage required herein must be licensed to conduct business in the State of Florida and must possess a current A.M. Best’s Financial Strength Rating of B+ Class VII or better. No changes are to be made to these specifications without prior written specific approval by County Risk Management.

VIII. PERFORMANCE AND PAYMENT BOND(S)

The Contractor must procure performance and payment bond(s) in accordance with Exhibit D.

IX. RESPONSIBILITIES OF THE CONTRACTOR

A. The Contractor must be responsible for the quality and functionality of all products supplied and services performed by or at the behest of the Contractor under this Agreement. The Contractor must, without additional compensation, correct any errors or deficiencies in its products, or if directed by County, supply a comparable replacement product or service.

B. The Contractor warrants that it has not employed or retained any company or person (other than a bona fide employee working solely for the Contractor), to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual, or firm other than a bona fide employee working solely for the Contractor, any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award of this Agreement.

C. The Contractor must comply with all federal, state, and local laws, regulations and ordinances applicable to the work or payment for work thereof, and must not discriminate on the grounds of race, color, religion, sex, or national origin in the performance of work under this Agreement.
D. Contractor specifically acknowledges its obligations to comply with §119.0701, F.S., as amended from time to time, with regard to public records, and must:

1) keep and maintain public records that ordinarily and necessarily would be required by the County in order to perform the services required under this Agreement;

2) upon request from the County’s custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 Florida Statutes or as otherwise provided by law;

3) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed, except as authorized by law; and

4) meet all requirements for retaining public records and transfer, at no cost to the County, all public records in possession of Contractor upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the County in a format that is compatible with the information technology system of the County.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901; publicrecords@leegov.com; http://www.leegov.com/publicrecords.

E. The Contractor is, and will be, in the performance of all work, services and activities under this Agreement, an independent contractor. Contractor is not an employee, agent or servant of the County and shall not represent itself as such. All persons engaged in any work or services performed pursuant to this Agreement will be at all times, and in all places, subject to the Contractor’s sole direction, supervision and control. The Contractor must exercise control over the means and manner in which it and its employees perform the work, and in all respects the Contractor’s relationship and the relationship of its employees to the County will be that of an independent contractor and not as employees of the County. The
Contractor will be solely responsible for providing benefits and insurance to its employees.

X. OWNERSHIP OF PRODUCTS

It is understood and agreed that all products provided under this Agreement will become the property of the County upon acceptance by the County.

XI. TIMELY DELIVERY OF PRODUCTS AND PERFORMANCE OF SERVICES

A. The Contractor must ensure that all of its staff, contractors and suppliers involved in the production or delivery of the products are fully qualified and capable to perform their assigned tasks.

B. The personnel assigned by the Contractor to perform the services pursuant to this Agreement must comply with the terms set forth in this Agreement.

C. The Contractor specifically agrees that all products must be delivered within the time limits as set forth in this Agreement, subject only to delays caused by force majeure, or as otherwise defined herein. “Force majeure” is deemed to be any unforeseeable and unavoidable cause affecting the performance of this Agreement arising from or attributable to acts, events, omissions or accidents beyond the control of the parties.

XII. COMPLIANCE WITH APPLICABLE LAW

This Agreement will be governed by the laws of the State of Florida. Contractor must promptly comply with all applicable federal, state, county and municipal laws, ordinances, regulations, and rules relating to the services to be performed hereunder and in effect at the time of performance. Contractor must conduct no activity or provide any service that is unlawful or offensive.

XIII. TERMINATION

A. The County shall have the right at any time upon fifteen (15) days’ written notice to the Contractor to terminate this Agreement in whole or in part for any reason whatsoever. In the event of such termination, the County will be responsible to Contractor only for fees and compensation earned by the Contractor, in accordance with Section III, prior to the effective date of said termination. In no event shall the County be responsible for lost profits of Contractor or any other elements of breach of contract.

B. After receipt of a notice of termination, except as otherwise directed, the Contractor must stop work on the date of receipt of the notice of termination or other date specified in the notice; place no further orders or sub-contracts for materials, services, or facilities except as necessary for completion of such portion of the work not terminated; terminate all
Contractors and subcontracts; and settle all outstanding liabilities and claims.

C. The County’s rights under this Agreement shall survive the termination or expiration of this Agreement and are not waived by final payment or acceptance and are in addition to the Contractor’s obligations under this Agreement.

XIV. **DISPUTE RESOLUTION**

A. In the event of a dispute or claim arising out of this Agreement, the parties agree first to try in good faith to settle the dispute by direct discussion. If this is unsuccessful, the parties may enter into mediation in Lee County, Florida, with the parties sharing equally in the cost of such mediation.

B. In the event mediation, if attempted, is unsuccessful in resolving a dispute, the parties may proceed to litigation as set forth below.

C. Any dispute, action or proceeding arising out of or related to this Agreement will be exclusively commenced in the state courts of Lee County, Florida, or where proper subject matter jurisdiction exists in the United States District Court for the Middle District of Florida. Each party irrevocably submits and waives any objections to the exclusive personal jurisdiction and venue of such courts, including any objection based on forum non conveniens.

D. This Agreement and the rights and obligations of the parties shall be governed by the laws of the State of Florida without regard to its conflict of laws principles.

E. Unless otherwise agreed in writing, the Contractor will be required to continue all obligations under this Agreement during the pendency of claim or dispute including, but not limited to, actual period of mediation or judicial proceedings.

XV. **STOP WORK ORDER**

The County may, at any time, by written order to the Contractor, require the Contractor to stop all or any part of the work called for by this Agreement. Any order must be identified specifically as a stop work order issued pursuant to this clause. This order shall be effective as of the date the order is delivered to the Contractor. Upon receipt of such an order, the Contractor must immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. The Contractor must not resume work unless specifically so directed in writing by the County. The County may take one of the following actions:

1. Cancel the stop work order; or
2. Terminate the work covered by the order; or

3. Terminate the Agreement in accordance with provisions contained in Section XIII.

In the event the County does not direct the Contractor to resume work, the stop work order may be converted into a notice of termination for convenience pursuant to Section XIII. The notice period for such termination shall be deemed to commence on the date of issuance of the stop work order. In the event the County does not direct the Contractor to resume work within ninety (90) days, the Contractor may terminate this Agreement.

XVI. CONTRACTOR WARRANTY

A. All products provided under this Agreement must be new (unless specifically identified otherwise in a Supplemental Task Authorization) and of the most suitable grade for the purpose intended.

B. If any product delivered does not meet performance representations or other quality assurance representations as published by manufacturers, producers or distributors of the products or the specifications listed in this Agreement, the Contractor must pick up the product from the County at no expense to the County. The County reserves the right to reject any or all materials if, in its judgment, the item reflects unsatisfactory workmanship or manufacturing or shipping damage. In such case, the Contractor must refund to the County any money which has been paid for same.

C. Contractor shall secure from the applicable third party manufacturers, and assign and pass through to the County, at no additional cost to the County, such warranties as may be available with respect to the equipment, parts and systems provided through the Purchase.

XVII. MISCELLANEOUS

A. This Agreement constitutes the sole and complete understanding between the parties and supersedes all other contracts between them, whether oral or written, with respect to the subject matter. No amendment, change or addendum to this Agreement is enforceable unless agreed to in writing by both parties and incorporated into this Agreement.

B. The Contractor must not assign any interest in this Agreement and must not transfer any interest in same (whether by assignment or novation) without the prior written consent of the County, except that claims for the money due or to become due to the Contractor from the County under this Agreement may be assigned to a financial institution or to a trustee in bankruptcy without such approval from the County. Notice of any such
transfer or assignment due to bankruptcy must be promptly given to the County.

C. The exercise by either party of any rights or remedies provided herein shall not constitute a waiver of any other rights or remedies available under this Agreement or any applicable law.

D. The failure of the County to enforce one or more of the provisions of the Agreement may not be construed to be and is not a waiver of any such provision or provisions or of its right thereafter to enforce each and every such provision.

E. The parties covenant and agree that each is duly authorized to enter into and perform this Agreement and those executing this Agreement have all requisite power and authority to bind the parties.

F. Neither the County’s review, approval or acceptance of, nor payment for, the products and services required under this Agreement must be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement.

G. If the Contractor is comprised of more than one legal entity, each entity must be jointly and severally liable hereunder.

H. Any notices of default or termination shall be sufficient if sent by the parties via United States certified mail, postage paid, or via a nationally recognized delivery service, to the addresses listed below:

**Vendor’s Representative:**  
**Name:** Robert Capoferri  
**Title:** President  
**Address:** 9021 Wire Road  
Zephyrhills, FL 33540  
**Telephone:** 813-788-0010  
**Facsimile:** 813-788-0020  
**E-mail:** Ponderosamark@hotmail.com  
JackieAPS@outlook.com  
DGannon@gmail.com  

**County’s Representatives:**  
**Names:** Roger Desjarlais  
**Titles:** County Manager  
**Address:** P.O. Box 398  
Fort Myers, FL 33902  
**Telephone:** 239-533-2221  
**Facsimile:** 239-485-2262  
**E-Mail:** rdesjarlais@leegov.com  
mtucker@leegov.com

Solicitation # B170265/ANB  
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I. Any change in the County’s or the Contractor’s Representative will be promptly communicated by the party making the change.

J. Paragraph headings are for the convenience of the parties and for reference purposes only and shall be given no legal effect.

K. In the event of conflicts or inconsistencies, the documents shall be given precedence in the following order:

1. Supplemental Task Authorization(s)
2. Agreement
3. County’s Purchase Order
4. Solicitation # B170265/ANB
5. Contractor’s Submittal in Response to Solicitation # B170265/ANB

[The remainder of this page intentionally left blank.]
IN WITNESS WHEREOF, the parties have executed this Agreement as of the date last below written.

WITNESS:

Signed By: Kenneth Messina
Print Name: Kenneth Messina
Secretary

Asphalt Paving Systems, Inc.

Signed By: ________________
Print Name: Robert Capoferri
Title: President
Date: 7/12/2017

LEE COUNTY
BOARD OF COUNTY COMMISSIONERS
OF LEE COUNTY, FLORIDA

BY: ________________
CHAIR
DATE: 9/5/17

ATTEST:
CLERK OF THE CIRCUIT COURT
Linda Doggett, Clerk

BY: ________________
DEPUTY CLERK

APPROVED AS TO FORM FOR THE RELIANCE OF LEE COUNTY ONLY:

BY: ________________
OFFICE OF THE COUNTY ATTORNEY

Solicitation # B170265/ANB
EXHIBIT A
SCOPE OF SERVICES

Contractor shall provide Alternative Paving services in accordance with Lee County Solicitation No. B170265/ANB and Supplemental Task Authorizations issued under this Agreement, if any.

A. Supplemental Task Authorizations
The term Supplemental Task Authorization refers to a written document executed by both parties under this Agreement setting forth and authorizing a limited number of services, tasks, or work for a specific project identified by the County. Such services, tasks, or work is consistent with and has previously been described by Solicitation No. B170265/ANB and this Agreement.

B. Award of Supplemental Task Authorizations
As provided by Solicitation No. B170265/ANB, individual projects may be awarded, and authorized via Supplemental Task Authorizations, to any of the firms approved by the Board of County Commissioners under that solicitation. Award shall be made as follows:

1. Each project/task order will not exceed $500,000.00.
   1.1. Any project/task order $50,000.00 or less may be awarded to the vendor holding a valid contract under this bid, with the lowest unit prices, able to meet the required schedule.
   1.2. Any project/task order $50,000.01, but less than $500,000.00 must be quoted by a minimum of 3 awarded vendors holding a valid contract under this Bid.
   1.3. Any project/task order over $100,000.00 must provide a payment and performance bond.
   1.4. No vendor will be paid more than $4,000,000.00 per year.
   1.5. Notice to Proceed (NTP)
   1.5.1. All project/task order $50,000.00 or less will use the purchase order as the notice to proceed. The start date and date or the number of day to complete the project must be included on the purchase order. If the start date is left off the purchase order then the date of the purchase order approval will default as the NTP start date.
   1.5.2. Projects $50,000.01 but less than $500,000.00 will have a formal NTP issued through the Procurement Management Division.
   1.6. The County retains the right to select any vendor to whom a multiple-vendor award has been made.
   1.7. The County retains the right to separately and competitively bid any and all job estimates greater than $500,000.00.

- Any project/task with a total cost of $50,000.00 or less may be awarded to the firm holding a valid contract under this bid, with the lowest unit prices, able to meet the required project schedule.
- Any project/task with a total cost of $50,000.01, but less than $500,000.00 must be quoted by a minimum of three (3) of the
EXHIBIT A
SCOPE OF SERVICES

approved firms holding a valid contract under Solicitation No. B170265/ANB. When quotes are requested, the Contractor’s submittal must be based on the unit prices provided by Exhibit B, or lower prices. The quote must not list any prices that are higher. Award of the project shall be made to the firm holding a valid contract under this bid, with the lowest quoted price, able to meet the required project schedule.

C. Performance of Work under this Agreement
All work shall be provided and performed in accordance with the Technical Specifications of Solicitation No. B170265/ANB and as further described in any Supplemental Task Authorizations issued under this Agreement.

D. PRICING
Consumer Price Index (CPI): Contract prices for equipment and/or service will remain firm through the first contract year. Contractors must request price adjustments, in writing, 30 days prior to the renewal date. If a contractor fails to request a CPI price adjustment 30 days prior to the contract renewal date, no price increase will be accepted. Price adjustments will be made in accordance with the percentage change in the U.S. Department of Labor Consumer Price Index (CPI-U) for All Urban Consumers, All Items, Miami Area. No retroactive contract price adjustments will be allowed.
EXHIBIT B
FEE SCHEDULE

Payment for actual work completed shall be made in accordance with the terms of this Agreement and any Supplemental Task Authorizations issued hereunder. All project pricing shall be determined by the rates established by the Contractor’s Response to Solicitation No. B170265/ANB, which appear below. All quotes received by the County from the Contractor must reflect pricing at or below the rates listed in this Exhibit B.

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<td>Detectable Warning Surfaces (Inset) *</td>
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<td>Detectable Warning Surfaces (Inset) *</td>
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<td>Det. Warning Surf. (Screwdown Retro-Fit)</td>
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## Exhibit B
### Fee Schedule

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<td>Pavement Messages (Paint)</td>
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## EXHIBIT B
### FEE SCHEDULE

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### FEE SCHEDULE

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<td>711-10</td>
<td>Remove Existing Pavement Markings</td>
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## EXHIBIT B
### FEE SCHEDULE

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<td>Recycling Agent</td>
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<td>324 HOT-IN-PLACE (100%) Asphalt Recycling</td>
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<td>Base Course HPR</td>
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</tr>
<tr>
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<tr>
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EXHIBIT C
INSURANCE REQUIREMENTS

Minimum Insurance Requirements: Risk Management in no way represents that the insurance required is sufficient or adequate to protect the vendors’ interest or liabilities. The following are the required minimums the vendor must maintain throughout the duration of this contract. The County reserves the right to request additional documentation regarding insurance provided

a. Commercial General Liability - Coverage shall apply to premises and/or operations, products and completed operations, independent contractors, contractual liability exposures with minimum limits of:

  $1,000,000 per occurrence
  $2,000,000 general aggregate
  $1,000,000 products and completed operations
  $1,000,000 personal and advertising injury

b. Business Auto Liability - The following Automobile Liability will be required and coverage shall apply to all owned, hired and non-owned vehicles use with minimum limits of:

  $1,000,000 combined single limit (CSL)
  $500,000 bodily injury per person
  $1,000,000 bodily injury per accident
  $500,000 property damage per accident

c. Workers’ Compensation - Statutory benefits as defined by FS 440 encompassing all operations contemplated by this contract or agreement to apply to all owners, officers, and employees regardless of the number of employees. Workers Compensation exemptions may be accepted with written proof of the State of Florida’s approval of such exemption. Employers’ liability will have minimum limits of:

  $500,000 per accident
  $500,000 disease limit
  $500,000 disease – policy limit

*The required minimum limit of liability shown in a and b may be provided in the form of “Excess Insurance” or “Commercial Umbrella Policies.” In which case, a “Following Form Endorsement” will be required on the “Excess Insurance Policy” or “Commercial Umbrella Policy.”
EXHIBIT C
INSURANCE REQUIREMENTS

Verification of Coverage:

1. Coverage shall be in place prior to the commencement of any work and throughout the duration of the contract. A certificate of insurance will be provided to the Risk Manager for review and approval. The certificate shall provide for the following:

   a. The certificate holder shall read as follows:

      Lee County Board of County Commissioners
      P.O. Box 398
      Fort Myers, Florida 33902B

   b. "Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials" will be named as an "Additional Insured" on the General Liability policy, including Products and Completed Operations coverage.

Special Requirements:

1. An appropriate "Indemnification" clause shall be made a provision of the contract.

2. It is the responsibility of the general contractor to insure that all subcontractors comply with all insurance requirements.
EXHIBIT D
PERFORMANCE AND PAYMENT BONDS

For each Supplemental Task Authorization authorizing work for a cost of $100,000.00 or more, the Contractor must procure a performance and payment bond in accordance with this Agreement and B170265/ANB.

A. In accordance with Chapter 255.05, Florida Statutes, as may be amended from time to time, and Lee County Ordinance 95-2-102, as may be amended from time to time, a public performance and payment bond is to be issued in a sum equal to one-hundred (100%) percent of the total awarded Supplemental Task Authorization amount by a surety company considered satisfactory by Lee County and otherwise authorized to transact business in the State of Florida.

B. Any bonding company submitting a performance and payment bond to Lee County Government must be licensed to transact a fidelity and surety business in the State of Florida.

C. A public performance and payment bond must be properly executed by the Surety Company and Contractor and recorded with the Lee County Clerk of Court within seven (7) calendar days after notification by Lee County of the approval to award the Supplemental Task Authorization. The Contractor is responsible for all fees and charges associated with the performance and payment bond, including the cost of recording.

D. A clean irrevocable letter of credit or cash bond may be accepted by the County in lieu of the public performance and payment bond.
Based on A.M. Best's analysis, 050457 - Zurich Insurance Group Ltd is the AMB Ultimate Parent and identifies the topmost entity of the corporate structure. View a list of operating insurance entities in this structure.

### Best's Credit Ratings

<table>
<thead>
<tr>
<th>Financial Strength Rating</th>
<th>View Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating:</td>
<td>A+ (Superior)</td>
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<tr>
<td>Affiliation Code:</td>
<td>g (Group)</td>
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<td>Financial Size Category:</td>
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<th>Long-Term Issuer Credit Rating</th>
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<td>Initial Rating Date:</td>
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u Denotes Under Review Best's Rating

### Best's Credit Rating Analyst

- **Rating Issued by:** A.M. Best Rating Services, Inc.
- **Senior Financial Analyst:** Darian Ryan
- **Senior Director:** Michael J. Lagomasino, CFA, FRM

### Disclosure Information

- A.M. Best Affirms Credit Ratings of Zurich Insurance Company Limited and Its Main Rated Affiliates
  December 01, 2016
## Financial Strength Rating

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<td>11/27/2012</td>
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### Related Financial and Analytical Data

The following links provide access to related data records that A.M. Best utilizes to provide financial and analytical data on a consolidated or branch basis.

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<td>Represents Property/Casualty business of this legal entity</td>
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<td>004430</td>
<td>Zurich U.S. Pool (SG)</td>
<td>Represents the A.M. Best Consolidated financials for the Property/Casualty business of this legal entity</td>
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### AMB Credit Reports

- **AMB Credit Report** - includes Best's Financial Strength Rating and rationale along with comprehensive analytical commentary, detailed business overview and key financial data. Report Revision Date: 2/22/2017 (represents the latest significant change).
- Historical Reports are available in AMB Credit Report Archive.

View additional news, reports and products for this company.
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<td>A.M. Best Removes from Under Review and Upgrades Ratings of Rural Community Insurance Company</td>
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<tr>
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<td>A.M. Best Comments on Zurich Insurance Group’s Ratings Following Announcement to Acquire Wells Fargo Crop-Insurance Subsidiaries</td>
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<tr>
<td>Nov 19, 2010</td>
<td>A.M. Best Upgrades Ratings of Zurich Insurance Company Limited’s U.S. Subsidiaries</td>
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American Guarantee and Liability Insurance Company (2)
A.M. Best #: 002552  NAIC #: 28247  FEIN #: 366071400
Administrative Office
1299 Zurich Way
Schaumburg, IL 60196-1056
United States
Web: www.zurichna.com
Phone: 800-987-3373
Fax: 877-962-2567

Based on A.M. Best's analysis, 050457 - Zurich Insurance Group Ltd is the AMB Ultimate Parent and identifies the topmost entity of the corporate structure. View a list of operating insurance entities in this structure.

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### Best's Credit Rating Analyst

Rating Issued by: A.M. Best Rating Services, Inc.
Senior Financial Analyst: Darian Ryan
Senior Director: Michael J. Lagomarsino, CFA, FRM

### Disclosure Information

A.M. Best Affirms Credit Ratings of Zurich Insurance Company Limited and Its Main Rated Affiliates
December 01, 2016

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A.M. Best has provided ratings & analysis on this company since 1944.
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### Press Releases

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**European Union Disclosures**

A.M. Best - Europe Rating Services Limited (AMBERS), a subsidiary of A.M. Best Rating Services, Inc., is an External Credit Assessment Institution (ECAI) in the European Union (EU). Therefore, Credit Ratings issued and endorsed by AMBERS may be used for regulatory purposes in the EU as per Directive 2009/46/EC.

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Powered by A.M. Best’s Global Insurance Database
## ACORD CERTIFICATE OF LIABILITY INSURANCE

**Client#:** 37227  
**ASHPAV1**  
**DATE (MM/DD/YYYY):** 7/14/2017

**PRODUCER:**
J. Byrne Agency, Inc.  
5200 New Jersey Avenue  
PO Box 1409  
Wildwood, NJ 08260

**INSURED:**
Asphalt Paving Systems Inc.  
500 N. Egg Harbor Road  
P.O. Box 530  
Hammonton, NJ 08037

**CONTACT NAME:** Joseph J. Meola, CIC, CRM  
**PHONE:** (A/C, No. Ext.): 609 522-3406  
**FAX:** (A/C, No. Ext): 609 522-2844  
**E-MAIL ADDRESS:** jmeola@byrneagency.com

**INSURER(A) AFFORDING COVERAGE:**

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<td>American Guarantee &amp; Liability</td>
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**COVERAGES**  
**CERTIFICATE NUMBER:**  
**REVISION NUMBER:**

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PROVIDER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

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**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101): Additional Remarks Schedule, may be attached if more space is required**

**RE:** Alternative Paving Projects; It is agreed that Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees and public officials, are included as additional insureds with respect to the operations performed by the named insured per Form U-GL-1175-F CW(04/13).

**CERTIFICATE HOLDER:**
Lee County Board of  
County Commissioners  
P.O. Box 396  
Fort Myers, FL 33902

**CANCELLATION:**

**SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.**

**AUTHORIZED REPRESENTATIVE:**

© 1988-2014 ACORD CORPORATION. All rights reserved.
Additional Insured – Automatic – Owners, Lessees Or Contractors

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THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ASPHALT PAVING SYSTEMS, INC.

Address (including ZIP Code): 500 N. Egg Harbor Road, P.O. Box 530, Hammonton, NJ 08037

This endorsement modifies insurance provided under the:

Commercial General Liability Coverage Part

A. Section II – Who Is An Insured is amended to include as an additional insured any person or organization whom you are required to add as an additional insured on this policy under a written contract or written agreement. Such person or organization is an additional insured only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by:

1. Your acts or omissions; or
2. The acts or omissions of those acting on your behalf,

in the performance of your ongoing operations or "your work" as included in the "products-completed operations hazard", which is the subject of the written contract or written agreement.

However, the insurance afforded to such additional insured:

1. Only applies to the extent permitted by law; and
2. Will not be broader than that which you are required by the written contract or written agreement to provide for such additional insured.

B. With respect to the insurance afforded to these additional insureds, the following additional exclusion applies:

This insurance does not apply to:

"Bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of, or failure to render, any professional architectural, engineering or surveying services including:

a. The preparing, approving or failing to prepare or approve maps, shop drawings, opinions, reports, surveys, field orders, change orders or drawings and specifications; or

b. Supervisory, inspection, architectural or engineering activities.

This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage", or the offense which caused the "personal and advertising injury", involved the rendering of or the failure to render any professional architectural, engineering or surveying services.
C. The following is added to Paragraph 2. Duties In The Event Of Occurrence, Offense, Claim Or Suit of Section IV – Commercial General Liability Conditions:

The additional insured must see to it that:

1. We are notified as soon as practicable of an "occurrence" or offense that may result in a claim;
2. We receive written notice of a claim or "suit" as soon as practicable; and
3. A request for defense and indemnity of the claim or "suit" will promptly be brought against any policy issued by another insurer under which the additional insured may be insured in any capacity. This provision does not apply to insurance on which the additional insured is a Named Insured if the written contract or written agreement requires that this coverage be primary and non-contributory.

D. For the purposes of the coverage provided by this endorsement:

1. The following is added to the Other Insurance Condition of Section IV – Commercial General Liability Conditions:

   Primary and Noncontributory insurance

   This insurance is primary to and will not seek contribution from any other insurance available to an additional insured provided that:
   a. The additional insured is a Named Insured under such other insurance; and
   b. You are required by written contract or written agreement that this insurance be primary and not seek contribution from any other insurance available to the additional insured.

2. The following paragraph is added to Paragraph 4.b. of the Other Insurance Condition of Section IV – Commercial General Liability Conditions:

   This insurance is excess over:

   Any of the other insurance, whether primary, excess, contingent or on any other basis, available to an additional insured, in which the additional insured on our policy is also covered as an additional insured on another policy providing coverage for the same "occurrence", offense, claim or "suit". This provision does not apply to any policy in which the additional insured is a Named Insured on such other policy and where our policy is required by a written contract or written agreement to provide coverage to the additional insured on a primary and non-contributory basis.

E. This endorsement does not apply to an additional insured which has been added to this policy by an endorsement showing the additional insured in a Schedule of additional insureds, and which endorsement applies specifically to that identified additional insured.

F. With respect to the insurance afforded to the additional insureds under this endorsement, the following is added to Section III – Limits Of Insurance:

   The most we will pay on behalf of the additional insured is the amount of insurance:
   1. Required by the written contract or written agreement referenced in Paragraph A. of this endorsement; or
   2. Available under the applicable Limits of Insurance shown in the Declarations, whichever is less.

   This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.

All other terms and conditions of this policy remain unchanged.
Detail by Entity Name

Foreign Profit Corporation
ASPHALT PAVING SYSTEMS, INC.

Filing Information

Document Number                F09000004816
FEI/EIN Number                  22-3787755
Date Filed                      12/04/2009
State                            NJ
Status                           ACTIVE

Principal Address
500 N. EGG HARBOR RD.
HAMMONTON, NJ 08037

Mailing Address
P.O. BOX 530
HAMMONTON, NJ 08037

Registered Agent Name & Address
Capoferri, Robert, President
9021 Wire Road
Zephyrhills, FL 33540

Name Changed: 03/28/2016
Address Changed: 03/28/2016

Officer/Director Detail

Name & Address

Title PVPT

CAPOFERRI, ROBERT
2561 AQUA VISTA BOULEVARD
FT LAUDERDALE, FL 33301

Title S

MESSINA, KENNETH G
2555 WEYMOUTH ROAD
HAMMONTON, NJ 08037

Title Assistant Corporate Secretary
Cresswell, Noelle  
8241 Shenandoah Run  
Wesley Chapel, FL 33544  

Title Asst. Treasurer  

Plummer, Steven G  
P.O. BOX 530  
HAMMONTON, NJ 08037  

**Annual Reports**  

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**Document Images**  

- 01/19/2017 – ANNUAL REPORT  
- 03/28/2016 – AMENDED ANNUAL REPORT  
- 01/30/2016 – ANNUAL REPORT  
- 05/11/2016 – AMENDED ANNUAL REPORT  
- 01/21/2015 – ANNUAL REPORT  
- 03/24/2014 – ANNUAL REPORT  
- 02/12/2013 – ANNUAL REPORT  
- 02/13/2012 – ANNUAL REPORT  
- 02/25/2011 – ANNUAL REPORT  
- 01/04/2011 – ANNUAL REPORT  
- 02/08/2010 – ANNUAL REPORT  
- 12/04/2009 – Foreign Profit  

View image in PDF format
August 13, 2019

Mr. Robert Capoferri  
Asphalt Paving Systems, Inc.  
500 N. Egg Harbor Road  
Hammonton, NJ 08037

SUBJECT: Renewal of Annual Contract No. B170265ANB C-7804  
Alternative Paving Methods

Dear Mr. Capoferri:

This is to inform you that Lee County agrees to renew the above subject contract for an additional one (1) year period, from 9/5/2019 through 9/4/2020.

We are hereby extending the annual contract for an additional one year period under the same terms and conditions as the original award.

If you have any questions regarding this letter, please contact me at (239) 533-8871.

Sincerely,

Kimberly Urban

Kimberly Urban  
Contracts Analyst  
Procurement Management Division

C: FinanceOnBase@leeclerk.org  
Project File
March 25, 2019
239-533-8871

Mr. Robert Capoferri
Asphalt Paving Systems, Inc.
500 N. Egg Harbor Rd.
Hammonton, NJ 08037

Subject: Renewal of Annual Contract B170265ANB C-7804
Alternative Paving Methods

Dear Mr. Capoferri:

The above-referenced annual contract will expire on September 4, 2019, unless renewed. Lee County is requesting that this annual contract be renewed for an additional one year period (9/5/2019 – 9/4/2020). Therefore, we are requesting that you choose one of the following options and return this letter to Lee County Procurement Management, Attn: Kimberly Urban, P.O. Box 398, Ft. Myers, FL 33902-0398, (Fax: 239-485-8383 or email kurban@leegov.com), within 15 calendar days from receipt.

X       a. I want to continue performing under this annual contract for an additional one year period under the same terms and conditions as agreed upon in the above-referenced quotation.

As a condition of this renewal, the vendor agrees to provide Lee County with an updated insurance certificate upon expiration of the original certificate on file with the County.

b. I am not interested in extending this contract for an additional one-year period. Why?

Vendor:  

Robert Capoferri, President

Lee County:  

Procurement Management Director

Signature

Signature of Authorized Official

3/27/19

Date

Date

P. O. Box 398, Fort Myers, Florida 33902-0398 (239) 533-2111
Internet address http://www.lee-county.com
AN EQUAL OPPORTUNITY AFFIRMATIVE ACTION EMPLOYER
AGENDA ITEM TITLE: Approval of Center for Public Safety Management (CPSM) Proposal for Comprehensive Analysis of Fire/EMS Services

SUMMARY OF ITEM: The Village is currently in the process of assessing whether it is in the best interests of the Village to continue utilizing Martin County for the provision of Fire/EMS Services or to retain another provider for these services. In order to complete this assessment, a comprehensive analysis of operations and issuance of a Request for Proposals (RFP) to potential service providers is necessary.

CPSM has prepared a proposal to assist the Village with these matters. The main deliverables for CPSM's analysis are:

- Preparation of a Request for Proposals (RFP) for Fire and EMS services
- Analysis of the proposals received in response to the RFP
- Identification of actual workload
- Identification and recommendation of appropriate staffing and deployment levels

RECOMMENDATION: Staff recommends approval of CPSM's proposal and further authorize the Village Manager to negotiate and execute the contract.

PREPARED BY: Howard W. Brown, Jr., ICMA-CM, Village Manager  DATE: 2/5/2020

ATTACHMENTS:
Description
CPSM Proposal
PROPOSAL FOR

COMPREHENSIVE ANALYSIS OF 
FIRE/EMS SERVICES

INDIANTOWN, FLORIDA

CPSM®

CENTER FOR PUBLIC SAFETY MANAGEMENT, LLC
475 K STREET NW STE 702 • WASHINGTON, DC 20001
WWW.CPSM.US • 800-998-3392

Exclusive Provider of Public Safety Technical Services for International City/County Management Association
February 5, 2020

Howard Brown
Village Manager
16550 SW Warfield Blvd
Indiantown, Florida 34956

Dear Mr. Brown:

The Center for Public Safety Management, LLC, the exclusive provider of public safety technical assistance for the International City/County Management Association, is pleased to submit this proposal for an analysis of Fire / EMS services for Indiantown, Florida. The CPSM approach is unique and more comprehensive than ordinary accreditation or competitor studies.

In general, our analysis involves the following major outcomes:

- Preparation of an RFP for fire and EMS services using the analyzed data in a forensic analysis for operations of the existing fire service (Martin County);
- Assist with analyzing RFP’s for service post delivery of the RFP;
- Conduct a data-driven forensic analysis to identify actual workload;
- Identify and recommend appropriate staffing and deployment levels for every discrete operational and support function in the department.

From our discussion and the information you provided, the Village was recently incorporated and is evaluating its ongoing relationship with both fire and police. This study will examine the fire department and the $5.9 million cost allocated to the Village. From CPSM’s perspective, this is an extremely high amount for a village of 6,000 people; most communities in which we have worked of that size do not have a general fund in that amount.

Our team has discussed in depth how best to proceed. We do not want to cause further undue cost to the Village and would suggest a two part study. The first would conduct a forensic analysis of the service being provided to the village. The second part would place team members on the ground and provide the Village with directions it might take and estimated costs.

This proposal is specifically designed to provide the local government with a thorough and unbiased analysis of emergency services in your community. We have developed a unique approach by combining the experience of dozens of subject matter experts in the areas of emergency services. The team assigned to the project will have hundreds of years of practical experience managing emergency service agencies, a record of research, academic, teaching and training, and professional publications, and extensive consulting experience completing hundreds of projects nation-wide. The team assembled for you will be true “subject matter experts” not research assistants or interns.
ICMA has provided direct services to local governments worldwide for almost 100 years, which has helped to improve the quality of life for millions of residents in the United States and abroad. I, along with my colleagues at CPSM, greatly appreciate this opportunity and would be pleased to address any comments you may have. You may contact me at 616-813-3782 or via email at twieczorek@cpsm.us. You may also contact our project manager, Leonard Matarese, at 716.969.1360 or via email at lmatarese@cpsm.us

Sincerely,

Thomas J. Wieczorek
Director
Center for Public Safety Management, LLC
The International City/County Management Association (ICMA) is a 103-year old, non-profit professional association of local government administrators and managers, with approximately 13,000 members located in 32 countries.

Since its inception in 1914, ICMA has been dedicated to assisting local governments and their managers in providing services to its citizens in an efficient and effective manner. ICMA advances the knowledge of local government best practices with its website, www.icma.org, publications, research, professional development, and membership. The ICMA Center for Public Safety Management (ICMA/CPSM) was launched by ICMA to provide support to local governments in the areas of police, fire, and Emergency Medical Services.

Center for Public Safety Management, LLC (CPSM)

The Center also represents local governments at the federal level and has been involved in numerous projects with the Department of Justice and the Department of Homeland Security. In 2014 as part of a restructuring at ICMA the Center for Public Safety Management, (CPSM) spun out as a separate company and is now the exclusive provider of public safety technical assistance for ICMA. CPSM provides training and research for the Association’s members and represents ICMA in its dealings with the federal government and other public safety professional associations such as CALEA, PERF, IACP, IFCA, IPMA-HR, DOJ, BJA, COPS, NFPA, etc.

The Center for Public Safety Management, LLC maintains the same team of individuals performing the same level of service that it had for ICMA. CPSM’s local government technical assistance experience includes workload and deployment analysis, using our unique methodology and subject matter experts to examine department organizational structure and culture, identify workload and staffing needs as well as industry best practices. We have conducted over 305 such studies in 42 states and provinces and 215 communities ranging in size from 8,000 population Boone, IA to 800,000 population Indianapolis, IN.
The proposal will look at the fire and EMS services of Indiantown, Florida. For this project, the CPSM has assembled a premier team of experts from a variety of disciplines and from across the United States. The goal is to develop recommendations that will enable it to produce the outcomes necessary to provide critical emergency services consistent with the community’s financial capabilities. The team will consist of a Project Manager, two Team Leaders and several senior public safety Subject Matter Experts selected from our team specifically to meet the needs of the community.

The management organizational chart for the project includes the following Key Team Members

- **PROJECT MANAGER**
  Leonard Matarase, MPA

- **FIRE TEAM LEADER**
  Joseph Pozzo, MPA

- **DATA TEAM LEADER**
  Dov Chelst, Ph.D.
PROJECT MANAGER

LEONARD A. MATARESE, MPA, ICMA-CM, IPMA-CP
Director of Research and Project Development, Center for Public Safety Management

BACKGROUND

Mr. Matarese is a specialist in public sector administration with particular expertise in public safety issues. He has 44 years’ experience as a law enforcement officer, police chief, public safety director, city manager and major city Human Resources Commissioner. He was one of the original advisory board members and trainer for the first NIJ/ICMA Community Oriented Policing Project which has subsequently trained thousands of municipal practitioners on the techniques of the community policing philosophy over the past 18 years. He has managed several hundred studies of emergency services agencies with attention to matching staffing issues with calls for service workload.

Recognized as an innovator by his law enforcement colleagues he served as the Chairman of the SE Quadrant, Florida, Blue Lighting Strike Force, a 71 agency, U.S. Customs Service anti-terrorist and narcotics task force and as president of the Miami-Dade County Police Chief’s Association – one of America’s largest regional police associations. He represents ICMA on national projects involving the United States Department of Homeland Security, The Department of Justice, Office of Community Policing and the Department of Justice, Office Bureau of Justice Assistance. He has also served as a project reviewer for the National Institute of Justice and is the subject matter expert on several ICMA / USAID police projects in Central America. As a public safety director, he has managed fire / EMS systems including ALS transport. He was an early proponent of public access and police response with AEDs.

Mr. Matarese has presented before most major public administration organizations annual conferences on numerous occasions and was a keynote speaker at the 2011 annual PERF conference. He was a plenary speaker at the 2011 TAMSEC Homeland security conference in Linköping, Sweden and at the 2010 UN Habitat PPUD Conference in Barcelona, Spain.

He has a Master’s degree in Public Administration and a Bachelor’s degree in Political Science. He is a member of two national honor societies and has served as an adjunct faculty member for several universities. He holds the ICMA Credentialled Manager designation, as well as Certified Professional designation from the International Public Management Association-Human Resources. He also has extensive experience in labor management issues, particularly in police and fire departments. Mr. Matarese is a life member of the International Association of Chiefs of Police and of ICMA.
DATA ASSESSMENT TEAM

DOV CHELST, PH.D.
Director of Quantitative Analysis

BACKGROUND
Dr. Chelst is an expert in analyzing public safety department’s workload and deployment. He manages the analysis of all public safety data for the Center. He is involved in all phases of The Center’s studies from initial data collection, on-site review, large-scale dataset processing, statistical analysis, and designing data reports. To date, he has managed over 140 data analysis projects for city and county agencies ranging in population size from 8,000 to 800,000.

Dr. Chelst has a Ph.D. Mathematics from Rutgers University and a B.A. Magna Cum Laude in Mathematics and Physics from Yeshiva University. He has taught mathematics, physics and statistics, at the university level for 9 years. He has conducted research in complex analysis, mathematical physics, and wireless communication networks and has presented his academic research at local, national and international conferences, and participated in workshops across the country.

SENIOR PUBLIC SAFETY SUBJECT MATTER EXPERT

DAVID MARTIN, PH.D.
Senior Researcher in the Center for Urban Studies, Wayne State University

BACKGROUND
Dr. Martin specializes in public policy analysis and program evaluation. He has worked with several police departments to develop crime mapping and statistical analysis tools. In these projects, he has developed automated crime analysis tools and real-time, dashboard-style performance indicator systems for police executive and command staff. Dr. Martin teaches statistics at Wayne State University. He is also the program evaluator for four Department of Justice Weed and Seed sites. He is an expert in the use of mapping technology to analyze calls for service workload and deployments.

SENIOR PUBLIC SAFETY DATA ANALYST

PRISCILA MONACHESI, M.S., B.A.

BACKGROUND
Priscila Monachesi is a Senior Data Analyst with CPSM and has worked on over 40 data analysis projects for city and county public safety agencies. She has over ten years’ experience as a Project Leader/Senior System Analyst in auto manufacturing and financial systems.

She has a M.S in Statistics from Montclair State University, a B.A. in Economics from Montclair State University, and a Technical Degree in Data Processing from Pontifícia Universidade Católica in Brazil.
PUBLIC SAFETY DATA ANALYST

SHAN ZHOU, PH.D.

BACKGROUND
Dr. Shan Zhou specializes in the analysis of police data. Shan brings extensive experience in scientific and clinical data analysis. Prior to CPSM, she worked as an associate scientist at Yale School of Medicine. Shan has a MS in Business Analytics and Project Management from University of Connecticut and a PhD in Cell biology, Genetics and Development from University of Minnesota.
OPERATIONS ASSESSMENT TEAM – FIRE UNIT

SENIOR MANAGER OF FIRE AND EMS

CHIEF JOSEPH POZZO, MPA (RET.)

Former Deputy Director, Volusia County Department of Public Protection; former Director and Fire Chief, Volusia County, Florida, former Fire Chief, Loudon County, Virginia, former Fire Chief Portsmouth, Virginia.

BACKGROUND

Chief Pozzo serves as the Senior Manager for Fire and EMS for the Center for Public Safety Management, LLC. Chief Pozzo enjoyed a thirty-four (34) year career in public service before joining the CPSM team. Chief Pozzo took a leave of absence in 2014 from the Center for Public Safety Management to assist the City of Port Orange, FL transition the fire department from the city’s public safety administrative model. While in Port Orange, Chief Pozzo was responsible for the reformation of the fire department to include the operations and management of this career department that delivers fire, EMS first response, and emergency management services to over 56,000 citizens living within 27 square miles.

Chief Pozzo has served as the Deputy Director of the Department of Public Protection Volusia County, Florida, where he was responsible for the day-to-day operations of Fire, EMS, Emergency Management, Medical Examiner, Beach Safety, Corrections, and Animal Services. He was formerly Chief of the Volusia County Fire Services. This agency is a combination department providing fire suppression and EMS services with career firefighters and volunteer members. This agency operated out of 23 stations and the Daytona Beach International Airport.

Prior to Chief Pozzo’s appointment in 2010 in Volusia County, he served as the Chief of the Loudoun County Department of Fire and Rescue. This agency is a combination fire and rescue system providing fire, rescue, and emergency management services to one of the fastest growing counties in the nation. The fire and rescue system during Chief Pozzo’s tenure provided these services to over 275,000 permanent residents living in 520 square miles of diverse suburban and rural area located within the National Capital Region. Fire, Rescue and Emergency Management services were executed through 450+ career staff and over 1300 volunteer members operating out of nineteen stations.

Prior to his appointment with Loudoun County, Chief Pozzo served as Chief of the Portsmouth Fire, Rescue and Emergency Services Department. This agency is one of the oldest professional departments on the eastern seaboard and served over 95,000 residents during Chief Pozzo’s tenure. Chief Pozzo also served in the City of Virginia Beach, Va. Fire Department for 19 years reaching the level of Battalion Chief prior to embarking on his career as a Fire Chief/Director.

He holds a Master of Public Administration degree from Troy University where he graduated with honors, a B.A. in Public Administration from Saint Leo University and several associate degrees including an AAS in Fire Science and Protective Services and numerous technical certifications. He holds the Chief Fire Officer Designation from the Center for Public Safety Excellence and has served as an Adjunct Instructor for the Virginia Department of Fire Programs.

Retired Fire Chief/Director Flagstaff Fire Department, Flagstaff Arizona; former Director and Fire Chief, Orange County, Florida Fire Rescue Department.
THOMAS WIECZOREK
Retired City Manager Ionia, MI; former Executive Director Center for Public Safety Excellence

BACKGROUND
Thomas Wieczorek is an expert in fire and emergency medical services operations. He has served as a police officer, fire chief, director of public safety and city manager and is former Executive Director of the Center for Public Safety Excellence (formerly the Commission on Fire Accreditation International, Inc.). He has taught several programs at Grand Valley State University, the National Highway Traffic Safety Administration (NHTSA), and Grand Rapids Junior College. He has testified frequently for the Michigan Municipal League before the legislature and in several courts as an expert in the field of accident reconstruction and fire department management. He is the past-president of the Michigan Local Government Manager’s Association; served as the vice-chairperson of the Commission on Fire Officer Designation; and serves as a representative of ICMA on the NFPA 1710 career committee.

He most recently worked with the National League of Cities and the Department of Homeland Security to create and deliver a program on emergency management for local officials titled, “Crisis Leadership for Local Government Officials.” It has been presented in 43 states and has been assigned a course number by the DHS. He represents ICMA on the NFPA 1710 and 1730 Standards Committees and is a board member on the International Accreditation Service, a wholly owned subsidiary of the International Code Council.

He received the Mark E. Keane “Award for Excellence” in 2000 from the ICMA, the Association’s highest award and was honored as City Manager of the Year (1999) and Person of the Year (2003) by the Rural Water Association of Michigan, and distinguished service by the Michigan Municipal League in 2005.

GERARD J. HOETMER, MPA
Retired Executive Director of Public Entity Risk Institute, Fairfax, Virginia

BACKGROUND
Gerry Hoetmer is an expert in fire services, emergency management, and risk management. He served as the founding executive director of the Public Entity Risk Institute, a nonprofit organization that provided training, technical assistance, and research on risk management issues for local government and other public and quasi-public organizations. During his tenure, as executive director he was a member of the National Academy of Sciences Disaster Roundtable. Prior to his position as executive director at PERI, Mr. Hoetmer worked at ICMA for 19 years, most recently as the director of research and development. He has written extensively on local government emergency management, the fire service, code enforcement, and risk management issues.

Seminal works include the first report to Congress on fire master planning and the first edition of Emergency Management: Principles and Practices for Local Government. In addition to providing expert testimony before Congress and local arbitration boards on fire staffing and
scheduling issues, Mr. Hoetmer represented ICMA on the NFPA 1500 Standard on Occupational Safety and Health; NFPA 1201, the Standard for Providing Emergency services to the Public; and the NFPA 1710, Standard for the Organization and Deployment of Fire Suppression Operations, Emergency Medical Operations, and Special Operations to the Public by Career Fire Departments. Mr. Hoetmer has developed and conducted training programs and seminars at FEMA’s Emergency Management Institute and the National Fire Academy in Emmitsburg, Maryland.

He holds a Bachelor’s from the State University of New York, New Paltz and the Master of Public Administration degree from the University of Colorado at Denver.

SENIOR ASSOCIATE

CHIEF JOHN (JACK) BROWN (RET.), BA, MS, EFO
Director, Arlington County Office of Emergency Management, Retired Assistant Chief Fairfax County Fire & Rescue Department

BACKGROUND

Jack Brown’s 40-year public safety career includes 29 years with the Fairfax County, Virginia Fire & Rescue Department, where he retired as Assistant Fire Chief of Operations. He served in a number of operational and staff positions, including the Office of the Fire Marshal where he attained NFPA certification as a Fire Inspector II and Fire Investigator. As an investigator, he conducted post fire and post blast investigations, assisting in the prosecution of offences involving arson and illegal explosives. He served as a Planning Section Chief and Task Force Leader for the Fairfax County Urban Search and Rescue Task Force (VA TF-1). He deployed to Nairobi, Kenya as Plans Chief in response to the 1998 embassy bombing and as Task Force Leader on a deployment to Taiwan in response to an earthquake in 1999.

Upon his retirement from Fairfax County in 2000, he became the Assistant Chief for the Loudoun County Department of Fire, Rescue and Emergency Management, where he led a team of firefighters to the Pentagon on 9/11 and assisted the Arlington County Fire Department as the initial Planning Section Chief for the incident. Jack served as Planning Section Chief on a Northern Virginia multi-jurisdictional emergency management task force that reestablished the New Orleans Emergency Operations Center just after Hurricane Katrina. He retired from Loudoun County in 2006 to pursue a career in emergency management.

Brown retired from the Coast Guard Reserve as a Chief Warrant Officer 4, specializing in port safety and security, with 33 years of combined Army and Coast Guard Reserve service. After 9/11, he served on active duty for 47 months, including 15 months in the Middle East. He received the Bronze Star Medal for actions in Baghdad, Iraq while supporting combat operations during Operation Iraqi Freedom.

Brown holds a bachelor’s degree in Fire Science Administration from the University of Maryland and a master’s degree in Quality Systems Management from the National Graduate School, Falmouth, Massachusetts. He is a 1997 graduate of the National Fire Academy’s Executive Fire Officer Program at the National Emergency Training Center, Emmitsburg, Maryland. He has been an adjunct professor at the Northern Virginia Community College and the University of the District of Columbia in the Fire Science curriculums. He is a graduate of the Executive Leadership Program in the Center for Homeland Defense and Security at the Naval Postgraduate School, Monterey, California.
ASSOCIATE

CHIEF PETER J. FINLEY, JR. (RET.), BA, EFO
Retired Chief of Department City of Vineland Fire Department and Winslow Township Fire Department. Past President NJ Career Fire Chiefs Association.

BACKGROUND
Pete Finley’s 36-year career in the fire and emergency services includes 28 in a career capacity with several different fire departments. He has served as Chief of Department for two New Jersey Fire Departments, most recently the Winslow Township Fire Department where, significant among other accomplishments, he was responsible for the planning, establishment and initial deployment of the career component of the department as it transitioned from fully volunteer to combination status. Prior to that he served for more than 20 years with the City of Vineland Fire Department holding every operational rank (Firefighter, Fire Prevention Specialist, Captain, Deputy Chief, Fire Chief) including 4 ½ years as Chief of Department. In this position, he initiated significant changes within the department including implementing numerous improved operational and safety initiatives, updating and modernizing equipment, providing the department’s first ever formal officer training and development program, and, significantly increasing the capabilities of the regional hazardous materials and special operations response team. During his tenure, the department received more than one million dollars in various grants. He formerly commanded the Vineland Rescue Squad gaining significant EMS operations and command experience, and, completing a complete overhaul of that organization’s operations.

Chief Finley currently serves as an Adjunct Professor in the Fire Science Program at Camden County College. In addition, since his retirement, he has been involved in conducting numerous fire department operational readiness and organizational evaluations including several under the auspices of the United State Coast Guard related to domestic port security assessments. He has also been involved in the development and administration of many fire service promotional examinations and assessment processes.

Chief Finley received his Associate in Applied Science degree from Atlantic Community College in New Jersey, and, earned his Bachelor of Science degree in Fire Science/ Administration from the University of Maryland. He is a 2003 graduate of the National Fire Academy’s Executive Fire Officer Program earning an Outstanding Research Award for his 2002 paper titled, “Residential Fire Alarm Systems: The Verification and Response Dilemma”. He has earned more than two dozen state and national fire service certifications, most of them the highest level attainable. Chief Finley has been a member of several fire service organizations and served on numerous committees throughout his career. In 2008 and 2009 he served as President of the New Jersey Career Fire Chiefs Association, a professional association that represents and advocates for the interests of the state’s full time professional fire chiefs and the fire service in general. From 2003–2005 he was a member of the Training and Education Committee of the Governor’s Fire Service and Safety Task Force.

EMS TEAM LEAD

MATT ZAVADSKY, MS-HSA, NREMT
Chief Strategic Integration Officer, MedStar Mobile Health Care, Operations Manager Rural Metro Ambulance Service-Orlando Fla.
BACKGROUND

Matt has 39 years’ experience in EMS and holds a Master’s Degree in Health Service Administration with a Graduate Certificate in Health Care Data Management. He is a frequent speaker at national conferences and has done consulting in numerous EMS issues, specializing in mobile integrated healthcare, high performance EMS system operations, public/media relations, public policy, EMS economic models and EMS research.

Matt is the Chief Strategic Integration Officer at MedStar Mobile Healthcare, the Public Utility Model EMS agency that provides exclusive emergency and non-emergency EMS and Mobile Integrated Healthcare services for Fort Worth and 14 other cities in North Texas. MedStar provides advanced life support ambulance service to 436 square miles and more than 1 million residents and responds to over 150,000 calls a year with a fleet of 60 ambulances.

Coming to MedStar in 2008 as the Operations Director, Matt has helped guide the continued development and implementation of numerous innovative programs with healthcare partners that have transformed MedStar fully as a Mobile Integrated Healthcare (MIH) provider, including high utilizer, CHF readmission reduction, observational admission reduction, hospice revocation avoidance, 9-1-1 nurse triage programs and partnerships with home health agencies. He is also the co-author of the book “Mobile Integrated Healthcare – Approach to Implementation” published by Jones and Bartlett Publishing.

Matt is the President of the National Association of EMTs and chairs their EMS Transformation Committee. He is also Adjunct Faculty for the University Of North Texas Health Science Center, Department of Health Management and Policy, as well as an appointed committee member to the Joint Commission’s Home Care Professional and Technical Advisory Committee (PTAC) and the Lewin Group’s Hospital Outpatient Quality Reporting (HOQR) Program Stroke and AMI Expert Work Group, developing metrics for use in value-based purchasing measures for emergency departments.
PROJECT SCHEDULE

Milestone 1 – Full execution of the agreement
Agreement will identify Project Launch date.

Milestone 2 – Project Launch
We will conduct an interactive telephone conference with local government contacts. Our project leads will launch the project by clarifying and confirming expectations, detailing study parameters, identifying agency point of contacts and commencing information gathering.

Milestone 3a – Information Gathering and Data Extraction – 30 Days
Immediately following project launch, the operations leads will deliver an information request to the department. This is an extensive request which provides us with a detailed understanding of the department’s operations. Our experience is that it typically takes an agency several weeks to accumulate and digitize the information. We will provide instructions concerning uploading materials to our website. When necessary, the lead will hold a telephone conference to discuss items contained in the request. The team lead will review this material prior to an on-site visit.

Milestone 3b – Data Extraction and Analysis – 14 Days
Also, immediately following the project launch the Data Lead will submit a preliminary data request, which will evaluate the quality of the Computer Aided Dispatch (CAD) system data. This will be followed by a comprehensive request for data from the CAD system to conduct the response and workload analysis. This request requires a concerted effort and focused response from your department to ensure the timely production of required for analysis. Delays in this process will likely extend the entire project and impact the delivery of final report. The data team will extract one year’s worth of Calls for Service (CFS) from the CAD system. Once the Data Team is confident the data are accurate, they will certify that they have all the data necessary to complete the analysis.

Milestone 3c – Data Certification – 14 days

Milestone 4a – Data Analysis and Delivery of Draft Data Report – 30 days
Within thirty days of data certification, the analysis will be completed and a draft, unedited data report will be delivered to the department for review and comment. After the data draft report is delivered, an on-site visit by the operations team will be scheduled.

Milestone 4b – Departmental Review of Draft Data Report – 14 days
The department will have 10 days to review and comment on the draft unedited data analysis. During this time, our Data team will be available to discuss the draft report. The Department must specify all concerns with the draft report at one time.

Milestone 4c – Final Data Report – 10 days
After receipt of the department’s comments, the data report will be finalized within 10 days.

Milestone 5 – Conduct On-Site Visit – 30 days
Subject matter experts will perform a site visit within 30 days of the delivery of the draft data report.

Milestone 6 – Draft Operations Report – 30 days
Within 30 days of the last on-site visit, the operations team will provide a draft operations report to the department point of contact. Again, the department will have 10 days to review and comment.

Milestone 7 – Final Report 15 days
Once the Village’s comments and concerns are received by CPSM the combined final report will be delivered to the Village within 15 days.

TOTAL ELAPSED TIME: 105 – 135 days
THE CPSM APPROACH – FIRE/EMS

Operations Review
Using information analyzed by the data team, an operational assessment by CPSM technical experts will be conducted to evaluate the deployment of emergency resources.

The CPSM team will evaluate equipment, maintenance, records, policies, procedures, mapping, implemented technology and innovations, facilities, training, and staff to create recommendations for future service delivery.

The team will meet with elected and appointed officials as well as identified community leaders to determine the outcome they are seeking from deployment of resources.

Observations and recommendations will be developed around key performance and analysis areas in the completion of the report and include:

- Comprehensive Data Analysis
  - Incident Type Workload
  - Response Time
  - Unit Workload
  - Analysis of Busiest Hour
- Governance and Administration
  - Organizational Structure
  - Organizational Leadership
  - Staffing and Deployment
  - External Relationships
- Organizational Behavior/Management/Processes
  - Time Allocation of Staff
  - Organizational Communication
  - Strategic Planning
  - Performance Measurement
- Financial Resources (Operating and Capital Resources)
- Programs (To include fire suppression, EMS, fire prevention, public education, fire investigation, technical rescue, hazardous materials, emergency management, , and other service delivery programs)
- Risk Management/All hazards approach to community protection
- ISO/Accreditation Benefit Analysis

Using GIS technology, we will review the current locations of deployed equipment and stations with recommendations developed for the future. Key to making these determinations will be response time for dispatched units and call density.

The CPSM data team has created a methodology for determining resource utilization that quantifies the maximum and minimum deployment of personnel and equipment. It is unlike any other approach currently used by consultants and is indicative of the desire by CPSM to deliver the right resources at the right time.

The forensic data analysis allows CPSM to determine where calls for service are coming from, what types of calls is the department responding to, and frequency of calls along with response from each station. With the forensic data analysis, CPSM can tailor additional questions at no cost to the city and department with decisions based on facts and supported by the data.

The analysis also begins the efficiency, effectiveness and safety analysis of the department from the first point of contact for citizens – dispatch. Too often the dispatch center is overlooked in
making determinations. Time and call processing is critical for fire and EMS efficiency and effectiveness.
Fire Suppression Services

Fire departments staff their stations and train their personnel to respond to a wide array of fire and vehicular accident emergencies. In addition, many departments use the long intervals between calls for service for a variety of fire prevention, training and station activities. Research in the United Kingdom as well as by FEMA has shown that the most cost-effective approach to fire deployment is the elimination of calls. If a call is received, eliminating hazards decreases the risk faced by first responders and may result in a more positive outcome. These preventive strategies should include building effective code enforcement and fire prevention activities as well as strong public education programs promoting smoke detectors, fire extinguisher use and placement in homes and businesses. The effort may also include early fire suppression using automatic sprinkler systems and other fire protection systems. These prevention and response challenges are illustrated below. CPSM will review operations, particularly prevention efforts which represent a paradigm shift for most departments.
The resulting data study CPSM completes will gather and analyze data on the efficiency and effectiveness of the current deployment on the fire runs. Resource utilization will be quantified for concentration, location, and unit utilization.

The study will also analyze fire call data to provide a comprehensive review of how fire services are delivered to the community including a detailed analysis of workloads and response times. The analysis of the workloads should begin with an in-depth study of the types of calls handled and their severity. The goal of this data gathering would be to explicate the fundamental nature of the fire challenge faced by the Fire Department.

The study will pay special attention to fires reported in residences or buildings. Some examples of questions to be answered as a part of the study include: What was the average response time of the first arriving fire suppression unit capable of deploying extinguishing agent? How long did the engine companies work at the scene?

For each call type, we will determine the time spent on-scene and the manpower personnel who worked the scene. This data will be aggregated to determine an overall average total time spent on fire calls per 24-hour period and by shift for each engine company. It will document any dramatic variations by time of day and day of week as well as seasonal variations. It will also require the review the department’s non-emergency productive hours that fire personnel carry out between emergency calls. The study will also analyze data to determine the proportion of calls and the associated workload that arise within the community’s borders compared to mutual aid calls.

Response time is an important statistic in emergency service systems. We will determine:

- Average response time of first arriving fire suppression unit capable of deploying extinguishing agent.
- Distribution of response times for different call categories
- Response time for the second arriving engine company, where possible

We will also identify and review calls that experienced unusually long response times.
Emergency Medical Services

Fire Departments provide emergency medical services in addition to fire suppression duties. In this project, we will analyze EMS call data to provide a comprehensive review of emergency medical services including a detailed analysis of workloads and response times. The analysis of the workloads will begin with an in-depth study of the types of calls handled and their severity. The goal is to explicate the fundamental nature of the emergency medical challenge faced by the community’s Fire Department. We will pay special attention to the most critical emergencies such as heart attack and serious vehicular accidents. We will also look at the level of EMS care being provided and evaluate the options and impacts of providing EMS care at the EMT, Intermediate or Paramedic levels.

For each call type, we will determine the time spent on-scene and the manpower personnel who worked the scene. These data will be aggregated to determine an overall average total time spent on fire calls per 24-hour period for each ambulance company and the unit hour utilization (UHU). We will also determine how much EMS calls contribute to the workload of fire engine companies since they also respond to most calls. We will document any dramatic variations by time of day and day of week as well as seasonal variations.

Response time is an important statistic in emergency service systems. We will determine not only average response time but also the distribution of response times for different call categories. We will also identify and review calls that experienced unusually long response times.
ANALYSIS OF THE BUSIEST HOURS OF THE YEAR

Fire departments often speak of the “worst case scenario” or “resource exhaustion” when developing staffing and deployment plans. In reality, an agency can never staff for the worst-case scenario, because whatever situation can be envisioned, there can always be a more serious event that can be planned.

What is needed to make staffing and apparatus decisions is a clear understanding of what levels of demand can reasonably be expected over specific periods of time in a specific jurisdiction. For example, what are the busiest calls for service times over a one year period and what levels of staffing and apparatus were needed to handle this workload?

To answer this question requires a detailed analysis of calls for service, broken down minute by minute, identifying which units were busy and how many units remained available to respond to a new call for service. More sophisticated analysis can take into consideration available mutual aid resources.

There is significant variability in the number of calls from hour to hour and the frequency of simultaneous or overlapping calls. One special concern relates to the fire resources available for the highest workload hours. We tabulate the data for each of 8760 hours in the year. We identify how often the fire department will respond to more than a specified number of calls in an hour. In studying call totals, it is important to remember that an EMS run typically lasts, on average, a different amount of time than a fire category call and this will vary depending upon whether EMS transport is provided.

Example of “Busiest Hour Analysis”

What follows is an example of a CPSM study of a fire department with 17 units staffed all the time. For the clear majority of these high-volume hours, the total workload of all units combined is equivalent to 3 or fewer units busy the entire hour. For the ten highest volume hours, 0.1% of the hours, the total workload exceeded 3 hours. These high-volume hours occurred between 10 a.m. and 9 p.m.

The hour with the most work was between 1000 and 1100 on September 12, 2009. The 21 calls involved 34 runs (a “call” is an incident and a “run” is a unit response). The combined workload was 417 minutes. This is equivalent to 7 firefighting units being busy the entire hour. However, in the City there are 17 units staffed all the time. During the worst portion of the hour, there were always at least 5 units still available to respond immediately. Only 5 of the 17 units were busy more than 30 minutes during this hour.

The hour with the most calls was between 1400 and 1500 on October 13, 2009. The 23 calls involved 28 runs. The combined workload was 379 minutes. This is equivalent to between 6 and 7 firefighting units being busy the entire hour. However, in the city there are 17 units staffed all the time. During the worst portion of the hour, there were always at least 7 units still available to respond immediately. Only 3 of the 17 units were busy more than 30 minutes during this hour.
Table 1. Frequency Distribution of the Number of Calls

<table>
<thead>
<tr>
<th>Number of Calls in an Hour</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-5</td>
<td>6397</td>
</tr>
<tr>
<td>6-10</td>
<td>2263</td>
</tr>
<tr>
<td>11-15</td>
<td>98</td>
</tr>
<tr>
<td>16 or more</td>
<td>2</td>
</tr>
</tbody>
</table>

Observations:
- A total of 6,397 hours (73%) in a year have received 0-5 calls.
- A total of 2,263 hours (25.8%) in a year have received 6-10 calls.
- A total of 100 hours (1.2%) in a year have received 11 or more calls.

Table 2. Top Ten Hours with the Most Calls Received

<table>
<thead>
<tr>
<th>HOURS</th>
<th>Number of Calls</th>
<th>Number of Runs</th>
<th>Total Busy Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-Oct-2009</td>
<td>1400</td>
<td>23</td>
<td>379</td>
</tr>
<tr>
<td>12-Sep-2009</td>
<td>1000</td>
<td>21</td>
<td>417</td>
</tr>
<tr>
<td>20-Jun-2009</td>
<td>2000</td>
<td>15</td>
<td>252</td>
</tr>
<tr>
<td>02-Feb-2009</td>
<td>1900</td>
<td>15</td>
<td>213</td>
</tr>
<tr>
<td>10-Jul-2009</td>
<td>1000</td>
<td>14</td>
<td>226</td>
</tr>
<tr>
<td>15-Feb-2009</td>
<td>1900</td>
<td>14</td>
<td>317</td>
</tr>
<tr>
<td>29-Jul-2009</td>
<td>1700</td>
<td>14</td>
<td>274</td>
</tr>
<tr>
<td>23-Feb-2009</td>
<td>1100</td>
<td>14</td>
<td>180</td>
</tr>
<tr>
<td>17-Mar-2009</td>
<td>1500</td>
<td>14</td>
<td>193</td>
</tr>
<tr>
<td>01-Mar-2009</td>
<td>1800</td>
<td>13</td>
<td>185</td>
</tr>
</tbody>
</table>
Table 3. Deployed Minutes by Unit for the Hour between 10 a.m. and 11 a.m. on 12-Sep-2009

<table>
<thead>
<tr>
<th>Station</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
<th>13</th>
<th>14</th>
<th>Number of Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit</td>
<td>E1</td>
<td>E2</td>
<td>T2</td>
<td>E3</td>
<td>T3</td>
<td>E4</td>
<td>T4</td>
<td>E5</td>
<td>E7</td>
<td>T7</td>
<td>E9</td>
<td>E10</td>
<td>E11</td>
<td>E12</td>
</tr>
<tr>
<td>0-5</td>
<td></td>
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</tr>
<tr>
<td>5-10</td>
<td>1.9</td>
<td>0.7</td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>10-15</td>
<td>3.1</td>
<td>5</td>
<td>5</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>15-20</td>
<td>5</td>
<td>4.3</td>
<td>5</td>
<td>0.5</td>
<td></td>
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<tr>
<td>20-25</td>
<td>4.4</td>
<td>1.1</td>
<td>4.4</td>
<td>5</td>
<td></td>
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<td></td>
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<tr>
<td>25-30</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
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<tr>
<td>30-35</td>
<td>4.6</td>
<td>5</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>35-40</td>
<td>5</td>
<td>5</td>
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<td></td>
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</tr>
<tr>
<td>40-45</td>
<td>4.4</td>
<td>5</td>
<td></td>
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<td></td>
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<tr>
<td>45-50</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td></td>
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</tr>
<tr>
<td>50-55</td>
<td>0.9</td>
<td>5</td>
<td>5</td>
<td>4.5</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55-60</td>
<td></td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>0.8</td>
<td>3.1</td>
<td>5</td>
<td>4.1</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>12.5</td>
<td>12.3</td>
<td>0.0</td>
<td>40.6</td>
<td>40.5</td>
<td>23.1</td>
<td>11.3</td>
<td>0.0</td>
<td>4.1</td>
<td>14.3</td>
<td>11.8</td>
<td>34.8</td>
<td>8.4</td>
<td>39.6</td>
</tr>
</tbody>
</table>

Note: The numbers in the cells are the busy minutes within the 5-minute block. The cell values greater than 2.5 are coded as red.

Observations:

- Between 10 a.m. and 11 a.m. on September 12, 2009, the fire department responded to 21 calls and dispatched 34 units to these calls.
- In the city, there are 17 units staffed all the time. During the worst portion of this hour, there were always at least 5 units still available to respond immediately. Only 5 of the 17 units were busy more than 30 minutes during this hour.
Figure 1. Workload by Unit and Call Type for the Hour between 10 a.m. and 11 a.m. on 12-Sep-2009

Observations:
- Engine companies E3, E11 and E12 were busy more than 40 minutes during this hour.
- Truck T3 was busy more than 40 minutes during this hour.
- Eleven units were busy less than 20 minutes. Two units responded to no calls.

Table 4: Overlapped Call Analysis

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Overlapped Call</td>
<td>1,536</td>
<td>48.5</td>
</tr>
<tr>
<td>Overlapped with another call</td>
<td>1,113</td>
<td>35.2</td>
</tr>
<tr>
<td>Overlapped with two calls</td>
<td>388</td>
<td>12.3</td>
</tr>
<tr>
<td>Overlapped with three calls</td>
<td>102</td>
<td>3.2</td>
</tr>
<tr>
<td>Overlapped with four or more calls</td>
<td>26</td>
<td>0.8</td>
</tr>
</tbody>
</table>

Observations:
- 48.5 percent of emergency incidents had no overlapped call.
- 35.2 percent of emergency incidents overlapped with another call.
- 12.3 percent of emergency incidents overlapped with two calls.
- 4.0 percent of emergency incidents overlapped with three or more calls.
PROPOSED FEES

The quotation of fees and compensation shall remain firm for a period of 90 days from this proposal submission.

CPSM proposes two part pricing on this project because of the size of the community and the price paid for fire/EMS service.

Part 1 will be a forensic analysis of the fire and EMS services for $19,000.

Part 2 will review the forensic analysis and assist with developing RFP’s for fire and EMS. The price for this portion would be $23,500 for developing the RFP and an additional $195 per hour for consulting services after delivery of the RFP. Past delivery of the RFP services will include such things as review of submitted proposals, scoring and ranking of proposals, interviewing perspective candidates, participation in pre-bid conference calls and other associated telephone conference calls. The per hour price would be billed/payable on a monthly basis.

The project would be billed in three installments: 40% upon signing the contract; 40% with delivery of the fire and EMS draft data analysis; 20% with delivery of the final reports. Following delivery of the draft reports, the Village will have 30 days to provide comments as to accuracy and a final report will be delivered within 30 days of the comment period.

Travel expenses will be billed as incurred, with no administrative fee or overhead charges.

**Deliverables**

Draft reports for fire/EMS will be provided for department review in electronic format.

To be ecologically friendly, CPSM will deliver the final report in computer readable material either by email or CD or both. The final reports will incorporate the operational as well as data analysis. Should the municipality desire additional copies of the report, CPSM will produce and deliver whatever number of copies the client request and will invoice the client at cost.

Should the Village desire additional support or in-person presentation of findings, CPSM will assign staff for such meetings at a cost of $2,500 per day/per meeting along with reimbursement of travel expenses.

CONCLUSION

Part of ICMA’s mission is to assist local governments in achieving excellence through information and assistance. Following this mission, Center for Public Safety Management, LLC acts as a trusted advisor, assisting local governments in an objective manner. CPSM’s experience in dealing with public safety issues combined with its background in performance measurement, achievement of efficiencies, and genuine community engagement, makes CPSM a unique and beneficial partner in dealing with issues such as those being presented in this proposal. We look forward to working with you further.
# PAST & CURRENT ENGAGEMENTS

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VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Indiantown Trust Fund Board Appointment(s) and Designation of a Board Chairperson

SUMMARY OF ITEM: On Friday, January 31, 2020, the Village received an email from Ms. Lynda Nycum, who currently serves on the Indiantown Community Trust Fund Board, resigning from the Board. The Village needs to appoint a replacement for Ms. Nycum, or the Village could re-appoint all new members altogether. There is also a need for the Village to designate a Chairperson for this Board.

RECOMMENDATION: Staff recommends that another member of the community be appointed to the Board and that Council Member Anthony D. Dowling be appointed to serve as its Chairperson until such time the Council wishes to replace or re-appoint him.

PREPARED BY: Howard W. Brown, Jr., Village Manager  DATE: 2/5/2020
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Community Development Block Grant (CDBG) Citizen Advisory Task Force (CATF) Member Appointment

SUMMARY OF ITEM: In order to apply for CDBG funding, the Village's CATF must have a minimum of five members. Due to a recent resignation on the Task Force, Staff reached out to Ms. Linda Ivory to fill the vacancy CATF. Staff has verified that Ms. Ivory is interested in serving and that she meets the membership requirements to serve on this Task Force.

RECOMMENDATION: Staff recommends appointment of Ms. Linda Ivory as the fifth member of the CDBG CATF.

PREPARED BY: Daniel Eick, Management Analyst

DATE: 2/5/2020
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETING DATE: February 13, 2020

MEETING TYPE: Regular Meeting


SUMMARY OF ITEM: Consultant Jim Karas will present his final report on the Annual Village Council Retreat held on February 1, 2020.

RECOMMENDATION:

PREPARED BY: Daniel Eick, Management Analyst

DATE: 2/5/2020
VILLAGE OF INDIANTOWN, FLORIDA
AGENDA MEMORANDUM

MEETINGDATE: February 13, 2020

MEETING TYPE: Regular Meeting

AGENDA ITEM TITLE: Florida Inland Navigation Water District (FIND) Waterways Assistance Funding

SUMMARY OF ITEM: FIND offers a Waterways Assistance Grant Program with the goal of alleviating problems associated with the Atlantic Intracoastal Waterway and associated waterways within the district.

Applications for funding assistance are due by 4:30 PM on March 27, 2020, with funds becoming available on October 1, 2020. The district is authorized to provide assistance of up to 75% for public navigation projects and 50% for other projects. The Village would be competing with other county applicants for funding equal to the tax revenue received by the district from Martin County.

RECOMMENDATION: Staff is seeking Council direction as to whether or not the Village might benefit from this opportunity.

PREPARED BY: Daniel Eick, Management Analyst          DATE: 2/5/2020