



CITY OF BELLE ISLE, FL CITY COUNCIL MEETING

Held in City Hall Chambers 1600 Nela Avenue Belle Isle FL

Held the 1st and 3rd Tuesday of Every Month

Tuesday, March 07, 2023 * 6:30 PM

AGENDA

City Council Commissioners

Nicholas Fouraker, Mayor

Vice-Mayor – Jim Partin, District 7

District 1 Commissioner – Ed Gold | District 2 Commissioner – Anthony Carugno | District 3 Commissioner – Karl Shuck | District 4 Commissioner – Randy Holihan | District 5 Commissioner – Beth Lowell | District 6 Commissioner – Stan Smith

Welcome - Welcome to the City of Belle Isle City Council meeting. Agendas and all backup material supporting each agenda item are available in the City Clerk's office or website at www.belleislefl.gov. If you are not on the agenda, please complete the yellow "Request to Speak" form to be handed to the City Clerk. The Council is pleased to hear relevant comments and has set a three-minute limit. Rosenberg's Rules of Order guide the conduct of the meeting. Order and decorum will be preserved at all meetings. Personal, impertinent, or slanderous remarks are not permitted. Please silence all technology during the session. Thank you for participating in your City Government.

1. **Call to Order and Confirmation of Quorum**
2. **Invocation and Pledge to Flag** - Commissioner District 4, Randy Holihan
3. **Promotion of Deputy Chief Grimm to Chief of Police**
4. **Promotion of Lieutenant Millis to Deputy Chief of Police**
5. **Consent Items** - These items are considered routine and previously discussed by the Council. One motion will adopt them unless a Council member requests before the vote on the motion to have an item removed from the consent agenda and considered separately.
 - a. Approval of the Special Called Session Minutes - March 1, 2023
 - b. Arbor Day Proclamation - Celebration April 8, 2023
6. **Citizen's Comments** - Persons desiring to address the Council MUST complete and provide to the City Clerk a yellow "Request to Speak" form located by the door. After being recognized by the Mayor, persons are asked to come forward and speak from the lectern, state their name and address, and direct all remarks to the Council as a body and not to individual members of the Council, staff, or audience. Citizen comments and each section of the agenda where public comment is allowed are limited to three (3) minutes. Questions will be referred to staff and should be answered by staff within a reasonable period of time following the date of the meeting. Order and decorum will be preserved at all meetings. Personal, impertinent, or slanderous remarks are not permitted. Thank you.
7. **Unfinished Business**
8. **New Business**
 - a. Appointment to Transportation Advisory Board - Zach Cummings
 - b. Advertise to Appoint Citizen to Orange County TFT Citizen Advisory Task Force
 - c. Approval of the Addition of Cay Circle to the County Sweeping Schedule
 - d. Approval of Comprehensive Plan Consultant
 - e. Consider the Recommendation of the Special Events Committee
 - f. Approval of Employment Contracts for Police Chief and City Clerk
 - g. Consider the Proposal of Colin Baenziger & Associates for City Manager Search
 - h. Discuss the Candidates for Interim City Manager Position
9. **Attorney's Report**
10. **City Manager's Report**
 - a. Chief's Report
 - b. Public Work Director's Report
11. **Mayor's Report**
12. **Items from Council**
13. **Adjournment**

"If a person decides to appeal any decision made by the Council with respect to any matter considered at such meeting or hearing, he/she will need a record of the proceedings, and that, for such purpose, he/she may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based." (F. S. 286.0105). "Persons with disabilities needing assistance to participate in any of these proceedings should contact the City Clerk's Office (407-851-7730) at least 48 hours in advance of the meeting." –Page 1 of 1



CITY OF BELLE ISLE, FL CITY COUNCIL MEETING

Wednesday, March 1, 2023, * 6:30 pm

MINUTES

Present was:

Nicholas Fouraker, Mayor
District 1 Commissioner – Ed Gold
District 2 Commissioner – Anthony Carugno
District 3 Commissioner – Karl Shuck
District 4 Commissioner – Randy Holihan
District 5 Commissioner – Beth Lowell
District 6 Commissioner – Stan Smith
District 7 Commissioner – Jim Partin

Absent was:

1. Call to Order and Confirmation of Quorum

Mayor Fouraker called the meeting to order at 6:30 pm, and City Clerk confirmed the quorum.

Also present were City Manager Francis, Attorney Geller, Chief Houston, DC Grimm, and Public Works Director Phil Price.

2. Invocation and Pledge to Flag

Comm Shuck gave the invocation and led the pledge to the flag.

3. Selection of an Interim City Manager

Mayor Fouraker opened discussion for the selection of an interim City Manager and confirmed receipt of the resumes of the 13 candidates.

Mr. Francis reported that after the last Council meeting, he contacted the ICMA Senior Advisor, Ken Parker. They spoke on the availability of City Managers in transition for interim and permanent positions. The City received ten qualified candidates from ICMA, a resume from a resident of the City, and one from April Fisher, Former Planner, and Interim City Manager.

He asked the Council for discussion on what is expected from an interim City manager, i.e.

- Will the interim City Manager attend all City meetings?
- Will the Interim City manager write grants, contracts, and policies?
- How long would they be in the position, or
- Will the Interim City manager keep things moving and be the rudder in the ship until a permanent City Manager is hired?

When the Permanent City Manager is in place, Mr. Francis recommended that the Council seek assistance from the ICMA Senior Advisor Group to help narrow down the search.

Mr. Francis recommended Council discussion to select five candidates from the list provided, schedule interviews, and simultaneously hire an executive search firm to start the process for a permanent City Manager. From the list, Mr. Francis said the following candidates have agreed to submit for an interim position consideration; Rosen, Drago, Powell, Whitson, Cavalli, and Fisher.

For clarification, Mr. Francis said the executive search firm would speak with Council and staff and hold a community forum to gather information. They will report and develop a community profile for candidate consideration. The firm will complete all media, review resumes, and report the top candidates to Council.

Mayor Fouraker said this had happened suddenly and that Council does not need to feel pressured to decide tonight. He stated that he has spoken to several municipalities and researched other cities undergoing a similar process. He added that an interim person would provide Council with a vigorous, transparent, comprehensive search.

Mayor Fouraker spoke on the process used in prior searches and asked for Council feedback,

Comm Partin said that for the interim position, he would like to consider someone who does not aspire to a permanent position. He agrees with the hiring of a consultant to assist with the process and coordinate citizen input.

Comm Gold spoke of the process of the last City Manager Search. He would like to hire an interim and advertise the position to allow for transparency. He said he worries about disqualifying a good candidate from the interim candidate list and would like to open the permanent position to them if they are a good fit. He would like to discuss not separating the candidates into two lists. Attorney Geller said the meetings are public forums and properly noticed for anyone to attend. He recommends placing the open position on the City's website and ICMA posting board.

Comm Carugno said that based on what has happened in the past, he would like to see a candidate who is not related to the City at all. He has reviewed and selected 5 out of the 13 candidates.

Comm Shuck said the Council does not know how long the interim will be in place; it could be 90 days or six months. The person hired as an interim may not want a full-time position or stay past 90 days.

Comm Holihan said he would like to maintain two categories of candidates, interim and permanent. The interim should hold the rudder and keep the ship afloat. Unfortunately, the Council will have to become more involved in the day-to-day until the permanent City Manager is in place.

Comm Lowell said that given the circumstances, an interim person would do a good job; however, Council must be clear with their expectations. If that person qualifies for the position and becomes the permanent City Manager, it should be considered.

Comm Smith said there are many moving parts, and the City needs someone immediately part-time to allow Council to search for a permanent replacement.

Comm Partin said that it is important to know who on the list do aspire to a full-time position.

Mayor Fouraker said that in deciding on an interim, the Council could motion as such and prohibit them from accepting a permanent position. The challenge is that they will have an advantage before submitting a national notice through a consulting firm. From a taxpayer's perspective, the process must be fair, vigorous, and comprehensive. In his perspective, the Council should hire an interim only to allow them to focus on a long-term employee. Mr. Francis shared his opinion and spoke on the hiring process using an executive search firm and not limiting the candidates.

After discussion, and for the record, Comm Carugno said he had been interrupted and asked for decorum. Council agreed to follow the format to carry on with a meeting, and if one does not have the floor, they should remain silent until the other is done.

Mayor Fouraker clarified the process and said he would like to see the Council's top 5 picks given to the City Clerk to compile the results to start the process and discussion. Or suggest another process for consideration.

Comm Carugno said he would like to schedule another meeting to discuss the process further. Council's consensus was to allow more time to review the resumes and submit their top five and move the process along.

After discussion, Comm Shuck motioned that each Commissioner provides a list of the top 5 candidates out of the 13 to the City Clerk no later than Thursday afternoon and convene a special meeting on Friday at 5 pm. Comm Carugno seconded the motion.

a.

Comm Gold asked if the Council is restricted to 13 candidates. He would like to suggest other names for consideration. He has received interest from John Tremblay, has qualifications like April Fisher, and does not have ICMA credentials. Mayor Fouraker said he would never discourage any candidate from submitting a resume. If one is received before the next meeting, a Commissioner can request consideration.

The motion passes 4:3 with Comm Gold, Lowell Holihan, nay.

Comm Partin moved to reconsider and withdraw the previous motion.

Comm Smith seconded the motion, which passed 5:2 with Comm Shuck and Carugno, nay.

Comm Gold moved to discuss the selection process at the Tuesday meeting and is open for any interested candidates to submit a resume and letter of interest for the interim city manager position no later than Monday, March 6, 2023, at noon. In addition, he would like to have the job posting placed on the City's website and the City's Facebook page.

City Clerk Yolanda Quiceno expressed her concerns and suggested placing the Police Chief as Interim City Manager. Doing so will save the City considerable funds and allow the City Council to focus on hiring a permanent City Manager. Mayor Fouraker asked if it may cause undue stress to a new Police Chief.

Deputy Chief Grimm said that as a team, it is possible; as a rudder, not full-time. He is excited to become the Chief of Police however will accept the interim position to help during the vetting process. Mr. Francis has done a great job of teaching us all. The staff can hold down the fort if needed. The staff and the citizens rely on the Council's decisions.

Mr. Francis said he spoke to all 13 candidates and noted that some would share his philosophy if they came on board, and some are not available until the end of the month. He opined that he did not offer an in-house appointment because he did not want to place undue stress on a brand-new chief of police due to many open projects.

Comm Gold stated that he has confidence in Chief Grimm as interim and Sergeant Millis as acting chief to keep us afloat until the Council hires a permanent City Manager. Comm Carugno said, at the recommendation of the City Manager, that he would like to move forward with the list of 13 qualified candidates.

Comm Lowell asked if the City Manager could provide his top 5 candidates to Council. Mayor Fouraker said he does not think that would be appropriate since it has not been advertised. He added that the City Manager was helpful in providing the list; however, he was not directed by Council to create a candidate list. Comm Lowell restated her request and asked the City Manager, if he was comfortable, to send her his top 5 candidates. Comm Smith asked the same.

Mayor Fouraker opened for public comment.

Bobby Lance residing at 6615 Matchett Road, spoke in support of the suggestion to have the Chief of Police act as the interim.

Charlene Cross residing at 5260 Chiswich Circle, said she would like to see the list of outstanding projects on the City Manager's desk so that Council can appoint an interim from the list who can fill those shoes. Other than that, she is also in support of the discussion of hiring in-house because it will bring stability to the staff for the 90 days.

Sue Nielsen spoke of the process City Council had in place during the last City Manager search. She noted that at the last Council meeting. Mr. Francis did say that he was going to talk to potential candidates.

There being no further comments, Mayor Fouraker closed public comment.

Mayor Fouraker informed Council members to refrain from speaking and to wait to speak once recognized.

Comm Smith made a motion to turn in all the names to be considered for an interim City Manager by noon on Monday, March 6, 2023, to the City Clerk, advertise the job opening in all areas necessary to benefit the City, and add to the Tuesday agenda discussion and possibly vote on an interim City Manager.

Comm Lowell seconded the motion.

Comm Shuck said it might be wise to amend the motion to add direction to the City Manager to post the opening as discussed.

Comm Smith restated his motion to instruct the City Manager to post the job opening in all the normal channels so anyone interested can submit a resume no later than Monday, March 6, 2023. Comm Lowell agreed to second the motion as amended.

Comm Carugno asked if the posting should list the credentials for consideration. It can be a lot to look at if it is open to anyone interested.

Comm Gold said it does not leave much time to research all the submittals.

Mr. Francis said the staff would send out an agenda on Friday, and a separate email will be sent to Council on Monday after Monday on noon with the names of all resumes submitted for the interim city manager position.

The motion passed 4:3 with Comm Gold, Carugno, and Shuck, nay.

Discussion on the Process for Hiring a City Manager for a Permanent Role

City Manager Francis provided a list of steps for hiring an Executive Search Firm. He asked if Council would like to proceed with an RFP/RFQ or piggyback off the Oakland contract; approximately \$32,000. He said the go-to firm in Florida is Colin Baensiger. Mayor Fouraker said he spoke with staff in Oakland and said the Council was not doing any part of the search and moved to allow the Executive Search Company to manage the search, develop the contract, and warranty the selection when the recommendation is made to Council. He continued and read a summary of Colin and Baesinger's contract agreement.

Attorney Geller said Piggyback contracts are allowed in Florida Statute, and the hiring of an Executive Search Firm might save time and may be a good option.

After discussion Comm Gold moved to move forward immediately with the Piggyback option with Colin Baesiger & Associates and include in the contract the following, "The firm will then advertise where it will be seen by the most CMs (ICMA, FCCMA, the firm's website, etc.) and it will have a closing date, usually about a month."

Comm Lowell seconded the motion, which passed unanimously 7:0.

4. Adjournment

With no further business, Mayor Fouraker called for a motion to adjourn.

The motion passed unanimously at 8:36 pm.

CITY OF BELLE ISLE



Celebrating Tree City USA Communities, Arbor Day, and our Commitment to Effective Urban Forestry in the City of Belle Isle



Whereas the City of Belle Isle, Florida, is recognized by the Arbor Day Foundation in honor of its commitment to effective urban forest management; and

Whereas the City of Belle Isle achieved Tree City USA recognition by meeting the program's four requirements: a tree board or department, a tree care ordinance, an annual community forestry budget of at least \$2 per capita, and an Arbor Day observance and proclamation; and

Whereas "Tree City USA communities see the impact an urban forest has in a community firsthand. The Trees being planted and cared for by the City of Belle Isle ensure that generations enjoy a better quality of life. Additionally, participation in this program brings residents together and creates a sense of civic pride, whether it's through volunteer engagement or public education," said Dan Lambe, president of the Arbor Day Foundation; and

Whereas, if there was a time for trees, now is that time. Communities worldwide face air quality issues, water resources, personal health and well-being, energy use, extreme heat, and flooding protection. Trees in our city increase property values, enhance the economic vitality of business areas and beautify our community, and trees, wherever planted, are a source of joy and spiritual renewal; and

Whereas, with Tree City USA recognition, the City of Belle Isle has demonstrated a commitment to effective urban forest management and its part to help address these challenges for the City of Belle Isle residents now and in the future.

Therefore, I, Nicholas Fouraker, Mayor of the City of Belle Isle, do hereby celebrate Tree USA communities and commit to the residents of the City of Belle Isle for their efforts to protect our trees, woodlands, and environmental initiatives. Further, I urge all residents to plant trees, promote the well-being of this and future generations, and broaden and diversify the environmental movement.

IN WITNESS WHEREOF, I have hereunto set my hand and caused the Seal of the City of Belle Isle to be affixed this 5th day of April, in the year two thousand twenty-two.

Attest _____
Yolanda Quiceno, City Clerk

Mayor Nicholas Fouraker



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Appointment to the Transportation Committee

Background: Zach Cummings is requesting to be appointed to the Transportation Advisory Committee. His information is attached. This will make three appointees. One additional appointee is needed for a quorum.

Staff Recommendation: Appoint Mr. Cummings to the Transportation Advisory Board.

Suggested Motion: I move we appoint Zach Cummings to the City Transportation Advisory Committee.

Alternatives: Do not make the appointments

Fiscal Impact: N/A

Attachments: Zach Cummings information

Dear Mr. Francis:

I am writing in response to an opening on the Traffic Committee. I have been nominated by Ed Gold.

I can offer you 17 years of engineering and management experience, excellent project-management skills, a great eye for detail, and excellent problem-solving skills, all of which should make me an ideal candidate for this opening.

I have attached my résumé for your review and would welcome the chance to speak with you sometime.

Best regards,

Zach Cummings
5103 La Croix Ave.
Belle Isle, FL 32812

Zachary Cummings, PMP

Belle Isle, Florida, United States



zwcummings@gmail.com



956.251.3812

Summary

I'm an engineer; I convert caffeine into things.

Experience



Lead Platform Engineer

Disney Parks, Experiences and Products

Dec 2019 - Present (3 years 3 months)

Leading the Cloud Access and Security team for Disney Parks, Experiences, and Products.



Cloud Systems Engineer

Kforce Inc

Jun 2018 - Dec 2019 (1 year 7 months)

Supporting and developing cloud security, identity, and, access management solutions for The Walt Disney Company.



Senior Solutions Engineer

ICF

Feb 2016 - Sep 2017 (1 year 8 months)

- Identify and contribute to business development and marketing opportunities.
- Perform all phases of software engineering including requirements analysis, application design, code development, and testing.
- Estimate engineering work effort for engineering team and effectively identify and prioritize the high impact tasks.
- Manage project teams and sub-contractors, taking responsibility for meeting client needs within quality, time, and budget conditions.
- Troubleshoot production support issues post-delivery and develop solutions as required.
- Support junior consultants and engineers with guidance and supervision of outputs.



Sr. Software Applications Developer

Texas A&M University

Dec 2011 - Feb 2016 (4 years 3 months)

- Provide technical leadership for the design, coding, testing, review, and documentation of complex College-wide programs, program modifications, or applications
- Develop specifications based on input from the University's stakeholders
- Makes recommendations based on the evaluation of hardware and software products and programming languages for their applicability to the system and/or project
- Pose and answer questions, provides technical guidance, and/or training to application users to ensure the success of an application

- Coordinate the development of system and programming standards
- Review the development of design specifications for other developers



Director

Brazos Valley Shuttle Project

Jan 2009 - Apr 2011 (2 years 4 months)

Established, managed, and set policy for a campaign formed as a cooperative effort between Texas A&M University, The George Bush Presidential Library, The Brazos Valley Museum of Natural History, as well as numerous business leaders, politicians, and educators from across the country which aimed to acquire a Space Shuttle Orbiter for display in a new museum.



General Engineer

Schlumberger Technologies

Jun 2006 - Jan 2009 (2 years 8 months)

Worked with clients to develop and design well cementing programs for unconventional oil and gas wells. Managed day to day operations of a \$12M per year Well Construction department with a staff of 40. Responsible for ordering material, controlling inventory, managing equipment and the facility, ensuring that crews and material left and arrived on time. Additional responsibilities included testing and validation of experimental software.

Education



Texas A&M University

B.S., Ocean (Civil) Engineering

2000 - 2005

Licenses & Certifications



ITIL Foundation Certificate in IT Service - AXELOS Global Best Practice

GR750151228ZC



Project Management Professional - PMI - Orange County Chapter

2162424



AWS Certified Solution Architect - Associate - Amazon Web Services (AWS)

Issued Apr 2018 - Expires Apr 2020

DHJPX4XCJFVEQ9CK

Skills

Programming • Amazon Web Services (AWS) • Project Management • Engineering • Program Management • Technical Writing • User Interface Design • User Experience Design • ITIL Certified • Data Analysis



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Appointment to the Orange County Tourist Development Tax Advisory Board

Background: The City received a letter from Orange County requesting that Belle Isle appoint a representative to the Orange County Tourist Development Tax (TDT) Advisory Board.

The TDT Citizen Advisory Task Force will be comprised of a diverse, cross-section of Orange County residents. It will exclude registered lobbyists, elected officials, or organizations that currently receive TOT funding or potentially may be seeking TDT funding. The goal is to have representation from various geographical and socioeconomic levels. I will appoint the co-chairs and in addition to commissioner appointments, I am inviting Each Orange County municipality is to recommend one representative to the Task Force. This will ensure all parts of Orange County are represented.

The Board members will receive extensive education and information on the TDT, Florida Statutes covering its uses, the economic impact of previous projects, presentations by organizations that may be seeking future funds and listening to public comments.

Staff Recommendation: Advertise the position.

Suggested Motion: I move we advertise for residents to apply for this Board for appointment at the March 21, 2023 Council Meeting.

Alternatives: Do not make the appointment

Fiscal Impact: N/A

Attachments: Memo from Mayor Demings



ORANGE COUNTY MAYOR

Jerry L. Demings

P.O. BOX 1393, 201 SOUTH ROSALIND AVENUE, ORLANDO, FL 32802-1393

PHONE: 407-836-7370 • FAX: 407-836-7360 • EMAIL: MAYOR@OCFL.NET

b.

February 28, 2023

TO: Orange County Board of County Commission

FROM: Mayor Jerry L. Demings

RE: Tourist Development Tax Citizens Advisory Task Force

Orange County is one of the top travel destinations in the world with over 59 million visitors a year and is fast-approaching pre-pandemic levels of 75 million annual visitors. Tourism is a \$75 billion industry and accounting for approximately 24% of employment in Orange County. The Orange County Tourist Development Tax (TDT) paid by visitors staying in hotels and short-term rentals has raised significant dollars since its' inception and proceeds have been used to invest in iconic public facilities that draw millions of tourists annually to our community.

The benefits of the TDT are far-reaching and have ensured our community continued to have a steady source of revenue to help us through some of the darkest days following 9/11, the economic recession in 2008, and the COVID-19 pandemic. Proceeds have been used to build and maintain the world class Orange County Convention Center, which has a \$25 billion economic impact and has created thousands of jobs. It also has been used to fund Visit Orlando so it could market Orlando nationally and internationally and ensure we remained a top travel destination. Orange County residents have benefited from the investment of TDT dollars in arts, culture and sports facilities funding premiere venues like the Dr. Phillip's Performing Arts Center, Camping World Stadium, and the Amway Arena. Funds have also benefited cultural institutions like the Winter Park Library, Orlando Ballet Center, One Pulse Museum, Orlando Philharmonic Plaza Live, Orange County History Center and Orlando Science Center Life Exhibit. In addition, the Sports Incentive Fund receives TDT dollars to pursue national and international sporting events to our region like the Pro Bowl, and NCAA Basketball Tournament.

In 2020, due to the COVID-19 pandemic, Orange County experienced a prolonged closure of our theme parks and hotels causing the TDT to decline and reach the point that excess reserves were necessary to cover all TDT obligations. To ensure we have proper coverage for any type of future disastrous event, the Orange County Comptroller has recommended total reserves be replenished to \$300 million (which had reached a low nearing \$170 million during the depth of the pandemic) and that annual TDT collections exceed \$300 million a year before the County considers undertaking any new projects or activities for TDT funding.

Revenue collected in 2022 was \$336 million and reserves are projected to reach \$300 million by the Spring of 2023. Achieving both milestones will meet the Comptroller's recommended revenues and reserves guidelines, which are indicators of a strong, sustained recovery of TDT proceeds. As a result, Orange County is now prepared to consider new projects or opportunities for TDT funding.

Since taking office as Mayor, I have strived to promote a transparent system that encourages education and community engagement in major decisions from housing to transportation to public safety. I would like to use the same process regarding the TDT. It is my intention to empanel a group of citizens to review and provide input to the Board of County Commissioners and Tourist Development Council on potential uses of future,

unencumbered TDT revenues. I am requesting each commissioner select a representative from your district to participate.

The TDT Citizen Advisory Task Force will be comprised of a diverse, cross-section of Orange County residents. We will exclude registered lobbyists, elected officials, or organizations that currently receive TDT funding or potentially may be seeking TDT funding. The goal is to have representation from various geographical and socioeconomic levels. I will appoint the co-chairs and in addition to commissioner appointments, I am inviting each of our municipalities to recommend one representative to the Task Force. This will ensure all parts of Orange County are represented.

The TDT is paid by tourists, and it is important that organizations representing our visitors be involved in the Task Force. Therefore, I am inviting our hospitality industry partners to participate.

As with other Task Forces Orange County has empaneled, members will receive extensive education and information on the TDT, Florida Statutes covering its uses, the economic impact of previous projects, presentations by organizations that may be seeking future funds and listening to public comments.

The TDT Task Force will be comprised of representatives from the following:

Orange County Mayor (Co-Chairs)
 Orange County Commissioners
 Orange County Municipalities
 Labor – AFL - CIO
 CFHLA – Central Florida Hotel Lodging Association
 Walt Disney World
 Universal Studios
 Sea World
 UCF Student Government
 African American Chamber
 Hispanic Chamber
 Asian Chamber
 LGBTQ Chamber
 Orlando Economic Partnership
 I-Drive Chamber
 Veterans Advisory Council

The TDT Task Force will hold its first meeting on Wednesday, March 22, 2023, from 9 am – 11 am in the BCC Chambers. The TDT Task Force will complete its work by July 2023, concluding with a report or presentation to the Tourism Development Council and the Board of County Commissioners on its' findings and observations. *Please send your district representative name to Roseann Harrington, Chief of Staff by March 10, 2023, at roseann.harrington@ocfl.net or 407-836-7370.*

I am confident that with citizen input, we can determine the right course of action to invest TDT funds in our community that meets statutory guidelines and benefits our residents and visitors.

c: Honorable Phil Diamond, Orange County Comptroller
 Byron Brooks, County Administrator
 Roseann Harrington, Chief of Staff to Mayor Demings
 Jeff Newton, County Attorney
 Carla Bell Johnson, Deputy County Administrator
 Natalia Garcia, Assistant to the Deputy County Administrator



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Agreement to Add Cay Circle to County Sweeping Schedule

Background: The City received a request from the residents on Cay Circle to have the street swept. OC EPD drafted an amendment to the current agreement to add Cay Circle to the schedule. All other streets in the area are already on the schedule.

Staff Recommendation: Approve the agreement

Suggested Motion: I move we approve the amendment with Orange County to add Cay Circle to the sweeping schedule .

Alternatives: None

Fiscal Impact: None (Paid by Lake Conway MSTU)

Attachments: Draft Agreement with Exhibit

Exhibit A.1 Street Sweeping Additions

c.



Exhibit A.1 Street Sweeping Additions

c.



FIRST AMENDMENT TO INTERLOCAL AGREEMENT FOR STREET SWEEPING SERVICES

This First Amendment to the Agreement for Street Sweeping Services (the "First Amendment"), effective as of the last date of execution below (the "Effective Date"), is made and entered into by and between the **City of Belle Isle**, a Florida municipal corporation, whose mailing address is 1600 Nela Avenue, Belle Isle, FL 32809 (the "City"), and **Orange County, Florida**, a charter county and political subdivision of the State of Florida, whose mailing address is 201 S. Rosalind Ave., Orlando, FL 32802 ("County").

WITNESSETH:

WHEREAS, the City and County have entered into that certain Interlocal Agreement for Street Sweeping Services, dated September 18, 2018 (the "Street Sweeping Services Agreement"); and

WHEREAS, the City and County now desire to amend the Street Sweeping Services Agreement to add certain streets within the City; namely Waltham Avenue and Cay Circle, that will be provided street sweeping services under the Agreement.

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the receipt and sufficiency of which is hereby acknowledged, the Parties hereby agree as follows:

Section 1. Recitals. The above Recitals are true and correct and are incorporated herein by reference.

Section 2. Authority. This First Amendment is entered into pursuant to the general authority of Section 163.01, Florida Statutes, relating to interlocal agreements.

Section 3. Street Sweeping Area Map. The Street Sweeping Services Agreement is hereby amended at Exhibit "A" by adding and incorporating the additional streets of Waltham Avenue and Cay Circle to be provided with services under the Street Sweeping Services Agreement, as shown on **Exhibit A.1** attached to this First Amendment.

Section 4. Swept Streets List. The Street Sweeping Services Agreement is hereby further amended at Exhibit "A" by adding and incorporating the additional streets of Waltham Avenue and Cay Circle within the 'Supplemental Swept Streets List,' as shown on **Exhibit A.2** attached to this First Amendment.

Section 5. Continuing Effect. Except as expressly set forth herein, the Street Sweeping Services Agreement remains unchanged and in full force and effect.

IN WITNESS WHEREOF, the City and County hereto have executed this First Amendment as of the dates below.

CITY OF BELLE ISLE, FLORIDA

By: City Council

By:_____
Nick Fouraker, Mayor

Date:_____, 2023

ATTEST:

By:_____
Yolonda Quiceno, City Clerk

ORANGE COUNTY, FLORIDA

By: Board of County Commissioners

By:_____
Jerry L. Demings
Orange County Mayor

Date:_____, 2023

ATTEST:

Phil Diamond, CPA, County Comptroller
As Clerk of the Board of County Commissioners

By:_____
Deputy Clerk
Print Name:_____

Attachments:

Exhibit A.1: Street Sweeping Additions

Exhibit A.2: Supplemental Swept Streets List

Exhibit A.1: Street Sweeping Additions (separate attachment)

Exhibit A.2: Supplemental Swept Streets List

Street Name	From To	Curb Miles	Curb Type
WALTHAM AVENUE	<i>[beginning and end points]</i>	[X]	<i>[Curbed/ Uncurbed]</i>
CAY CIRCLE	<i>[beginning and end points]</i>	[X]	<i>[Curbed/ Uncurbed]</i>



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Approve Proposal for Consultant for Comp Plan Update

Background: The City Council authorized advertising for proposals for a consultant to update the Comprehensive Plan that is due in 2024. Every seven years, the City has to report any changes to the state or send a letter stating that no changes are needed to the plan. The last Comp Plan update was in 2008.

The City received two proposals:

Chen Moore and Associates (CMA), Maitland, FL - \$98,840.00

RVI Planning, Orlando, FL - \$116,500

Both proposals span 2 fiscal years, therefore, the cost of the plan will be budgeted over the next two fiscal years.

Staff Recommendation: After reviewing the proposals, the staff recommendation is to have the Council approve the proposal of RVI.

Suggested Motion: I move we accept the proposal of RVI in the amount of \$116,500.

Alternatives: Reject all bids

Fiscal Impact: \$65,000 for the first year.

Attachments: Proposals



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Recommendation of the Special Events Committee

Background: The City received one proposal for the Centennial Consultant. The Special Events Committee reviewed the proposal and is recommending that the council not move forward with the proposal. The Chair of the Special Events Committee is also recommending that the Council, at a future meeting, appoint 2-3 alternates to the Special Events Committee. This will allow more participation and help to insure that a quorum is present to conduct business at future meetings.

Staff Recommendation: None

Suggested Motion: **I move we accept the recommendations fo the Special Events Committee.**

Alternatives: Do not accept the recommendations

Fiscal Impact: None if accepting the Committee recommendation

Attachments: Consultant Proposal



CONSULTANT PROPOSAL

DATE: 7 February 2023

TO: City of Belle Isle
1600 Nela Ave
Belle Isle, FL 32809

ATT: City Clerk

FROM: William Morgan
1916 Elizabeth Ave
Orlando, FL 32804
(407) 427-9692
wsmorganv@outlook.com

RE: RFP# 23-02
Centennial Celebration Consultant

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LETTER OF TRANSMITTAL

7 February 2023

City of Belle Isle
1600 Nela Ave
Belle Isle, FL 32809

ATT: City Clerk

RE: RFP #23-02: Centennial Celebration Consultant

I am pleased to transmit the following material in response to your Request for Proposal #23-02 for a Centennial Celebration Consultant.

Should this proposal be approved, I would be pleased to serve as the primary point of contact for developing and implementing the city's plans to mark its centennial by working with staff, the city's Special Events Committee, residents, neighbors, and community stakeholders.

My proposal is to contract with the city as a sole proprietor and may be contacted as directed below.

Respectfully submitted,

William Morgan
1916 Elizabeth Ave
Orlando, FL 32804
(407) 427-9692
wsmorganv@outlook.com

GENERAL INFORMATION

Name of Business

N/A – This proposal is submitted by a sole proprietor.

Mailing Address and Phone Number

Willian Morgan
1916 Elizabeth Ave
Orlando, FL 32804
(407) 427-9692

Names and contact information of persons to be contacted for information or services if different from the name of person in charge.

N/A

Normal business hours.

Daily from 7am to 7pm and by appointment.

Business legal status.

Sole proprietorship.

Date organized/incorporated.

N/A – Sole proprietorship.

Office location and number of staff.

N/A – Sole proprietorship. Contract work is completed both in home office at address given above, or at client-designated sites/facilities.

Parent/subsidiary firms or agencies.

N/A – Sole proprietorship.

State of Florida business licenses, permits, or certifications.

N/A – Sole proprietorship.

Responsibility for permits, licenses, and fees.

Proposer successfully contracts as a sole proprietor consultant without any special permits, licensure, or fee requirements. If any such requirements should be imposed or deemed necessary to complete any contract with the City of Belle Isle, it is understood that Proposer would be solely responsible for immediate compliance at no cost to the city.

SUNBIZ.Org information.

N/A – Sole proprietorship.

How did you hear about the RFP?

Email.

PROJECT APPROACH

I propose to develop and implement plans to mark Belle Isle's centennial by working with staff, the city's Special Events Committee, residents, neighbors, and community stakeholders.

My intent is to recognize the city's centennial through a series of both virtual and live events and observances, such as:

- Developing a "centennial city" logo for display at all events and collateral.
- Refreshing the "history" page on the city's website.
(<https://www.belleislefl.gov/community/page/history>)
- Overseeing a community photo contest, with selected submissions to be featured in a "2024 Centennial Calendar."
- Participating at "Pioneer Days" festival at Cypress Grove Park, 24 & 25 Feb 2024.
- Hosting a "Founders Day" event, 25 April 2024.
- Scheduling a "vintage baseball" event, possibly to include the City of Edgewood which is also marking its centennial in 2024.
- Burying a time capsule and/or unveiling a centennial historical marker at a suitable location, perhaps Cross Lake Beach.

Development of these events and observances will require input from meetings of the Special Events Committee, which I commit to attend, and direct oversight and approval from the City Manager. These working relationships will be vital to ensuring expectations are clearly defined (and met) for each aspect of the centennial observances and that they are executed with both safety and fiscal responsibility.

Volunteers will be a key component to making the centennial a success. I will recruit, schedule, train, and manage volunteers to ensure there are enough helping hands at all events/observances.

All centennial Programming will be planned and executed according to public safety requirements and ADA accessibility guidelines.

I will secure appropriate venues, technical equipment, personnel, and supplies for centennial observances according to budget allocations and provide detailed accounting or same.

I will work with city staff and Special Events committee to:

- Raise necessary funds for centennial observances by obtaining grants and securing sponsorship commitments.
- Develop and execute a Centennial marketing plan to include advertising, publications, public relations, social media, and community networking.
- Create and implement necessary signage for all Centennial events.

Each approved Centennial event/observance will be followed by a debriefing with both the City Manager and Special Events committee, with feedback consolidated and submitted in writing as a means to assist in future event planning.

EXPERIENCE & QUALIFICATIONS

Years in business

- 13 years in large public events planning.
- 30 years in budgeting, team building, scheduling, job costing, and financial reporting.

Qualifications

- Founding (and current) chairman, Pine Castle Pioneer Days, Inc., since 2010.
- Founder, Central Florida Chesterton Society, 2013; (and chapter host of 2018 national conference).
- Central Florida Genealogical Society, Inc. – lifetime member, facilitator of monthly Irish Special Interest Group since 2016, and incoming Board member 2023.
- Orange County Regional History Center, genealogical contributor to special exhibit, “Genome: Unlocking Life’s Code and the History of You,” 2018.
- Event planner, Osceola History’s Pioneer Day at Shingle Creek Village in 2022.
- Event planner, Dine With the Departed at the City of Kissimmee’s Rose Hill Cemetery, 2022 and 2023.

References

Commissioner Mayra Uribe
Orange County District 3
201 S Rosalind Ave, 5th Floor
Orlando, FL 32801
(407) 836-5140
District3@ocfl.net

Elaine Powell, President
Central Florida Genealogical Society
P.O. Box 533958
Orlando, FL 32853-3958
(407) 484-4843
Elaine64@aol.com

Bobby Lance
6615 Matchett Road
Belle Isle, FL 32809
(407) 448-6555
bcplance@bellsouth.net

PRICING & PAYMENT TERMS

Consultant services as outlined in City of Belle Isle RFP #23-02 to be rendered as detailed on preceding pages for a period of **ONE YEAR** with the option to extend by mutual written agreement

FOR THE SUM OF \$10,400.04

Notes

- 1. Following acceptance of this proposal and execution of contract, Proposer will submit an invoice to the City on or about the first day of each month of the contract term for the prorated amount of \$866.67.
- 2. Invoices will be due upon receipt and payable by the last day of each month.
- 3. Invoices not paid within 30 days of submission will be considered past due and may result in interruption of service.
- 4. Invoices not paid within 60 days of submission will be considered late and will result in suspension of contract and a halt to service.
- 5. Invoices not paid within 90 days of submission will be cause for termination of contract.



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Approval of Employment Contracts for Police Chief and City Clerk

Background: The Police Chief and City Clerk are requesting Council approve an employee agreement with them. Currently the City Manager, outgoing Police Chief and Director of Finance have employment agreements. Since the outgoing Chief worked under a contract, it is logical that the incoming Chief be granted a contract. In conducting research on the City Clerk, there are numerous municipalities that provide an employment agreement for City Clerks. In the event there is a conflict between the personnel manual and the agreement, the agreement will prevail.

Staff Recommendation: City Manager recommends approval of both agreements

Suggested Motion: **I move we approve the Employment Agreements of the Police Chief and the City Clerk.**

Alternatives: Do not approve either or both agreements

Fiscal Impact: As per the approved budget

Attachments: Employee Agreements

**City of Belle Isle, FL
EMPLOYMENT AGREEMENT**

This Employment Agreement ("Agreement") is made and entered into as of the _____ day of _____, 2023, by and between the **CITY OF BELLE ISLE** (hereafter referred to as the "City"), a municipal organization organized and existing under the laws of the State of Florida, with its office located at City Hall Belle Isle, Florida and **TRAVIS GRIMM** (hereinafter referred to as the "Employee":).

NOW THEREFORE, in consideration for the mutual covenants herein, the parties agree as follows:

1. Employment and Duties:

A. Employment Duties: The City hereby agrees to employ Employee as Police Chief, and Employee agrees to accept such employment, all subject to the terms and conditions set forth in this Agreement. Unless otherwise provided herein, the Employee shall devote his full time as Police Chief and carry out to the best of his ability all duties imposed on him by the City Charter, City Ordinances as they now exist, or from time to time may be changed by the City of Belle Isle, and such other duties as the City may from time to time require him.

B. City Manager: Employee, who shall serve as the Police Chief of the City, shall report and be directly accessible to the City Manager.

2. Term:

A. The term of employment under this Agreement will commence, _____, 2023, and continue until terminated by either party as provided in paragraph 7 below.

3. Compensation & Benefits:

A. The City will pay Employee for all services rendered and performed hereunder a base salary of \$113,126.66 or ten percent higher than the highest pay grade for Deputy Chief according to the Police Pay Plan, effective _____, 2023 per annum, in equal installments paid bi-weekly (26 pay periods per annum). October 1 of each year, the Employee's base salary shall increase based on the current highest grade of the Deputy Chief according to the Police Pay Plan.

B. Employee's job performance shall be reviewed and evaluated by the City Manager periodically under this Agreement and discussed with Employee by the City Manager.

C. Any increases in Employee's base salary beyond those set forth in Paragraph 3A above shall be negotiated by the City Manager and the Employee and, when necessary, approved by the City Council.

4. Fringe Benefits:

A. Employee shall be eligible for and participate in all fringe benefits uniformly provided to Employees of the City on the same basis and under the same conditions as said employees.

B. Dues and Subscriptions: Subject to the presentation of proper receipts or invoices and the appropriation of funds as part of the City's annual budget, City agrees to pay for the professional dues and subscriptions reasonably necessary for Employee's continuation and full participation in national, regional, state and local associations, organizations, memberships and subscriptions which Employee determines are necessary and desirable for his continued professional participation, growth and advancement, and for the good of the City, which the City Manager, in his/her exclusive discretion, approves.

C. Conventions:

(1) City hereby agrees to budget and to pay the registration fees, out of the Tri-County area travel and subsistence consistent with subparagraph 4(C) (3) below for attendance by Employee as a member in good standing to the annual meetings or conventions.

(2) Additionally, the City shall pay for all other meetings, seminars, and short courses attended by the Employee, which the City Manager, in his/her exclusive discretion, approves in advance. If attendance at such functions requires overnight travel and expense, the Employee shall be reimbursed in accordance with City policy.

(3) All other expenses shall be reimbursed in accordance with the City policy applicable to all employees.

D. Automobile:

Employee's duties require that Employee shall have the exclusive use at all times during employment with the City of an automobile to carry out the business of the City. The City shall either provide the use of a City-owned vehicle or an automobile allowance of \$650/month for the use of said automobile for travel. If Employee elects to use the automobile allowance, Employee shall be responsible for paying for insurance, operation, maintenance, and vehicle repairs.

5. Extent of Services and Hours of Work:

Except during periods of illness, vacation, or absences of a day or more authorized by the City Manager, or his/her designee, Employee will devote his best efforts to performing his duties and responsibilities under this Agreement. Nothing herein will limit Employee's right to make passive investments, to participate in charitable service and organizations, other community activities, and trade and professional organizations, or to undertake other activities which do not interfere with the performance of his duties hereunder, it is mutually agreed that his participation in charitable service, other community activities, and trade and professional organizations is to the benefit of the City. Employee shall not otherwise be employed on a full or part-time basis without the prior written permission of the City Manager.

6. Indemnification and Cooperation:

A. To the extent permitted by law, the City shall defend, hold harmless and indemnify Employee against any tort, professional liability claim or demand, or other legal action for which the City is legally responsible for actions of Employee acting in his capacity as the Police Chief and which are within the scope of his authority and employment as Police Chief whether he is sued in his official capacity or as an individual, subject to applicable law and the City Charter and Ordinances, and any limitations contained therein.

B. In the event of actual or threatened litigation and/or administrative proceedings involving the City which arise out of the operation or actions which occurred or are alleged to have occurred while Employee was the Police Chief of the City of Belle Isle, Employee will cooperate with the City and its counsel in assisting the City in every legal manner to prevail in said action. The City shall pay Employee's reasonable travel and subsistence expenses incurred away from his home outside the Tri-County area that is incurred in preparation for and actual discovery, settlement, and trial of all said matters.

C. Employee further agrees that unless required by law, he will not cooperate with or assist any party, person, or entity who has, had, or may have, or asserts that she has or may have any claim of any nature against the City, its agents, officers, employees, City members or representatives, without the express written permission of the City or its designee.

7. Termination:

Termination by Employee: The Employee may resign and terminate this Agreement upon thirty (30) days written notice to the City. Should Employee resign his employment and terminate this Agreement:

1. Employee shall receive no severance pay or benefits under this Agreement, except as may be otherwise provided in the City Personnel Rules and Regulations applicable to him if he resigns his employment.

2. This Agreement (except for Paragraph 6, which shall remain in force and effect for as long as the law allows) shall be automatically canceled, and except as to those paragraphs that continue in effect, neither Employee nor the City shall have any further obligation one to the other under this Agreement or otherwise.

B. Termination by the City:

1. This Agreement may be terminated at any time, with or without cause, at the will and pleasure of the City Manager, subject to the conditions contained in Paragraph 7B (2).
2. Except as provided in Paragraph 7B (3) below, and subject to subparagraphs 7B (2) (c) and (d) below, if Employee is terminated, she shall be paid severance pay under the conditions set forth in subparagraphs 7B (2) (a) below. An offer by the City Manager to allow the Employee the opportunity to resign in lieu of termination voluntarily shall be considered a termination under and subject to the conditions set forth in this subparagraph 7B(2) below.
 - (a) The Employee shall receive severance pay equal to the maximum allowed by Florida law of the base salary if terminated; provided; however, there shall be no severance pay due in cases of termination consistent with Paragraph 7B (3) or termination by the Employee.
 - (b) City shall continue to pay for the premium necessary to provide Employee group medical insurance for a period of twelve (12) weeks from the date of the Employee's termination under Section 7B, just as if he had remained actively employed during such period, but subject to the conditions set forth in subparagraph 7B(2)(d) and 7B (3) below.
 - (c) Employee shall comply with paragraphs 6B and 6C of this Agreement following termination of this Agreement.
 - (d) The City shall no longer be obligated to pay the premiums for Employee's group medical insurance under subparagraph 7B (2) (b) above once Employee has obtained employment with another employer who offers group medical insurance for which Employee meets that employer's eligibility requirements (and assuming any waiting periods have passed).
 - (e) Upon termination of this Agreement, neither Employee nor the City shall have any obligation one to the other except (i) as set forth in Paragraph 6; (ii) for accrued benefits, if any, to which Employee is entitled under the City Personnel Rules and Regulations applicable to him as a terminated Employee; or (iii) as otherwise provided in this Agreement.
3. The City shall have no obligation to pay any severance pay or to provide Employee group medical insurance or other benefits under paragraph 7B (2) hereunder, unless otherwise required by law if Employee is terminated for any or a combination of the following:
 - (a) Dishonesty with respect to the business and operation of the City.
 - (b) Violation of the City drug policy.
 - (c) Refusal to cooperate in a legal investigation involving any aspect of the business or operation of the City conducted by or at the direction of the City Commission.
 - (d) Conviction or pleading guilty or Nolo Contendere to a felony.
 - (e) Causing the City to be found in violation of law through gross neglect or willful or intentional conduct by Employee.

8. Notice of Consent:

Any written or other notice required by this Agreement shall be deemed delivered as follows:

- A. As to the City, when delivered by personal service to the City Clerk at the City Hall during the regular business hours of the City or by Certified or Registered mail to the City Clerk at the City Hall, said delivery is to be verified by an executed Certified or Registered mail receipt, signed by the City Clerk or the City Clerk's designee.
- B. As to Employee, by personal service to him or via Certified or Registered mail to him at the most recent mailing address set forth in the City's personnel records.

9. Miscellaneous:

The City Personnel Rules and Regulations as they now exist or as they may be later modified by the City shall apply to Employee except when inconsistent with this Agreement or the City Charter.

The City Manager shall be the person with whom Employee shall coordinate with respect to off-duty time.

f.

This Agreement shall be interpreted, construed, and governed according to the laws of the State of Florida. In the event of litigation to enforce this Agreement, the prevailing party shall be entitled a reasonable attorney's fees and costs in addition to any other relief to which the prevailing party is entitled in accordance with applicable law.

No amendment or variation of the terms and conditions of this Agreement shall be valid unless in writing and signed by the parties.

The Employee's rights and obligations under this Agreement are personal and are not assignable; provided, however, in the event of the Employee's death, any accumulated but unused benefits to which an Employee's heirs and executors are entitled under the City Personnel Rules and Regulations shall inure to the benefits of the Employee's heirs and executors to the same extent as all other City Employees.

The invalidity or unenforceability of any particular provision of this Agreement shall not affect the other provision hereof, and this Agreement shall be construed in all respects as if such invalid or unenforceable provisions were omitted.

This Agreement supersedes any and all other understandings or agreements, whether written or oral and constitutes the complete and full agreement between the parties and may be modified only by, the written agreement of Employee and the City Manager.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals as of the day and year first above written.

By:

Mayor Nicholas Fouraker

Bob Francis, City Manager

Travis Grimm, Employee

**City of Belle Isle, FL
EMPLOYMENT AGREEMENT**

This Employment Agreement ("Agreement") is made and entered into as of the 24th day of February 2023 by and between the **CITY OF BELLE ISLE** (hereafter referred to as the "City"), a municipal organization organized and existing under the laws of the State of Florida, with its office located at City Hall Belle Isle, Florida and **YOLANDA QUICENO** (hereinafter referred to as the "Employee").

NOW, THEREFORE, in consideration for the mutual covenants herein, the parties agree as follows:

1. Employment and Duties:

- A. **Employment Duties:** The City hereby agrees to employ Employee as City Clerk, and Employee agrees to accept such employment, all subject to the terms and conditions set forth in this Agreement. Unless otherwise provided herein, the Employee shall devote her full time as City Clerk and carry out to the best of her ability all duties imposed on her by the City Charter, City Ordinances as they now exist, or from time to time may be changed by the City of Belle Isle, and such other duties as the City may from time to time require her.
- B. **City Manager:** Employee, who shall serve as the City Clerk of the City, shall report and be directly accessible to the City Manager.

2. Term:

- A. The term of employment under this Agreement will commence February 24, 2023, and continue until terminated by either party, as provided in paragraph 7 below.

3. Compensation & Benefits:

- A. The City will pay Employee for all services rendered and performed hereunder a base salary, eighty-five thousand three hundred forty-five dollars (\$85,345) in equal installments per annum, paid bi-weekly (26 pay periods per annum), or as otherwise mutually agreed; provided, however, that unless otherwise agreed to by the City and Employee, as of October 1 of each year the Employee's base salary shall increase based on the cost of living increases (COLA's) and merit increases uniformly provided by the City that year.
- B. Employee's job performance shall be reviewed and evaluated by the City Manager periodically under this Agreement and discussed with Employee by the City Manager.
- C. Any increases in Employee's base salary beyond those outlined in Paragraph 3A above shall be negotiated by the City Manager and the Employee and, when necessary, approved by the City Council.

4. Fringe Benefits:

- A. Employee shall be eligible for and participate in all fringe benefits uniformly provided to Employees of the City on the same basis and under the same conditions as said employees.
- B. Paid Time-off (PTO) Benefits
The City Clerk has been employed since October 2008 and shall accrue PTO at the rate established in the Personnel Manual by the length of service of 9:00 hours a pay period (in addition to recognized regular and floating City Holidays). At any time during the term of this Agreement, the City Clerk shall be entitled to cash-out accrued PTO days, provided that at least 120 accrued PTO hours remain available. The amount paid to the City Clerk shall be based on her annual base salary when the PTO hours are cashed out. Upon separation from employment, the City Clerk shall be paid for all accrued and unused PTO time available at that time.
- C. Dues and Subscriptions: Subject to the presentation of proper receipts or invoices and the appropriation of funds as part of the City's annual budget, City agrees to pay for the professional dues and subscriptions reasonably necessary for Employee's continuation and full participation in national, regional, state, and local associations, organizations,

memberships, and subscriptions which Employee determines are necessary and desirable for her continued professional participation, growth, and advancement, and for the good of the City, which the City Manager, in his/her exclusive discretion, approves.

- D. **Conventions:** (1) City hereby agrees to budget and to pay the registration fees, out of the Tri-County area travel and subsistence consistent with subparagraph 4(C)(3) below for attendance by Employee as a member in good standing to the annual meetings or conventions.

(2) Additionally, the City shall pay for all other meetings, seminars, and short courses attended by the Employee, which the City Manager, in his/her exclusive discretion, approves in advance. If attendance at such functions requires overnight travel and expense, the Employee shall be reimbursed in accordance with City policy.

(3) All other expenses shall be reimbursed in accordance with the City policy applicable to all employees.

5. Extent of Services and Hours of Work:

- A. Except during periods of illness, vacation, or absences of a day or more authorized by the City Manager, or his/her designee, Employee will devote her best efforts to performing her duties and responsibilities under this Agreement. Nothing herein will limit Employee's right to make passive investments, to participate in charitable service and organizations, other community activities, and trade and professional organizations, or to undertake other activities which do not interfere with the performance of her duties hereunder, it is mutually agreed that her participation in charitable service, other community activities, and trade and professional organizations is to the benefit of the City. Employee shall not otherwise be employed on a full or part-time basis without the prior written permission of the City Manager.

6. Indemnification and Cooperation:

- A. To the extent permitted by law, the City shall defend, hold harmless and indemnify Employee against any tort, professional liability claim or demand, or other legal action for which the City is legally responsible for actions of Employee acting in her capacity as the City Clerk and which are within the scope of her authority and employment as City Clerk whether she is sued in her official capacity or as an individual, subject to applicable law and the City Charter and Ordinances, and any limitations contained therein.
- B. In the event of actual or threatened litigation and/or administrative proceedings involving the City which arise out of the operation or actions which occurred or are alleged to have occurred while Employee was the City Clerk of the City of Belle Isle, Employee will cooperate with the City and its counsel in assisting the City in every legal manner to prevail in said action. The City shall pay Employee's reasonable travel and subsistence expenses incurred away from her home outside the Tri-County area that is incurred in preparation for and actual discovery, settlement, and trial of all said matters.
- C. Employee further agrees that unless required by law, she will not cooperate with or assist any party, person, or entity who has had or may have, or asserts that she has or may have any claim of any nature against the City, its agents, officers, employees, City members or representatives, without the express written permission of the City or its designee.

7. Termination:

- A. **Termination by Employee:** The Employee may resign and terminate this Agreement upon thirty (30) days written notice to the City. Should Employee resign her employment and terminate this Agreement:
1. Employee shall receive no severance pay or benefits under this Agreement, except as may be otherwise provided in the City Personnel Rules and Regulations applicable to Employee if they resign.
 2. This Agreement (except for Paragraph 6, which shall remain in force and effect for as long as the law allows) shall be automatically canceled, and except as to those

paragraphs that continue in effect, neither Employee nor the City shall have any further obligation one to the other under this Agreement or otherwise.

B. Termination by the City:

1. This Agreement may be terminated at any time, with or without cause, at the will and pleasure of the City Manager, subject to the conditions contained in Paragraph 7B(2).
2. Except as provided in Paragraph 7B (3) below, and subject to subparagraphs 7B(2) (c) and (d) below, if Employee is terminated, she shall be paid severance pay under the conditions outlined in subparagraphs 7B (2) (a) below. An offer by the City Manager to allow the Employee the opportunity to resign in lieu of termination voluntarily shall be considered a termination under and subject to the conditions outlined in this subparagraph 7B(2) below.
 - a. The Employee shall receive severance pay equal to the maximum allowed by Florida law of the base salary if terminated; provided; however, there shall be no severance pay due in cases of termination consistent with Paragraph 7B(3) or termination by the Employee.
 - b. City shall continue to pay for the premium necessary to provide Employee group medical insurance for a period of twelve (12) weeks from the date of the Employee's termination under Section 7B, just as if she had remained actively employed during such period, but subject to the conditions set forth in subparagraph 7B(2)(d) and 7B(3) below.
 - c. Employee shall comply with paragraphs 6B and 6C of this Agreement following termination of this Agreement.
 - d. The City shall no longer be obligated to pay the premiums for Employee's group medical insurance under subparagraph 7B (2) (b) above once the employee has obtained employment with another employer who offers group medical insurance for which Employee meets that employer's eligibility requirements (and assuming any waiting periods have passed).
 - e. Upon termination of this Agreement, neither Employee nor the City shall have any obligation one to the other except (i) as outlined in Paragraph 6; (ii) for accrued benefits, if any, to which Employee is entitled under the City Personnel Rules and Regulations applicable to her as a terminated Employee; or (iii) as otherwise provided in this Agreement.
3. The City shall have no obligation to pay any severance pay or to provide Employee group medical insurance or other benefits under paragraph 7B(2) hereunder unless otherwise required by law if Employee is terminated for any or a combination of the following:
 - a. Dishonesty with respect to the business and operation of the City.
 - b. Violation of the City drug policy.
 - c. Refusal to cooperate in a legal investigation involving any aspect of the business or operation of the City conducted by or at the direction of the City Commission.
 - d. Conviction or pleading guilty or nolo contendere to a felony.
 - e. Causing the City to be found in violation of law through gross neglect or willful or intentional conduct by Employee.

8. Notice of Consent:

Any written or other notice required by this Agreement shall be deemed delivered as follows:

- A. As to the City, when delivered by personal service to the City Clerk at the City Hall during the regular business hours of the City or by Certified or Registered mail to the City Clerk at the City Hall, said delivery is to be verified by an executed Certified or Registered mail receipt, signed by the City Clerk or the City Clerk's designee.
- B. As to Employee, by personal service to her or via Certified or Registered mail to her at the most recent mailing address outlined in the City's personnel records.

9. Miscellaneous:

- A. The City Personnel Rules and Regulations as they now exist or may be later modified by the City shall apply to Employee except when inconsistent with this Agreement or the City Charter.
- B. The City Manager shall be the person with whom Employee shall coordinate with respect to off-duty time.
- C. This Agreement shall be interpreted, construed, and governed according to the laws of the State of Florida. In the event of litigation to enforce this Agreement, the prevailing party shall be entitled a reasonable attorney's fees and costs in addition to any other relief to which the prevailing party is entitled in accordance with applicable law.
- D. No amendment or variation of the terms and conditions of this Agreement shall be valid unless in writing and signed by the parties.
- E. The Employee's rights and obligations under this Agreement are personal and are not assignable; provided, however, in the event of Employee's death, any accumulated but unused benefits to which an Employee's heirs and executors are entitled under the City Personnel Rules and Regulations shall inure to the benefits of the Employee's heirs and executors to the same extent as all other City Employees.
- F. The invalidity or unenforceability of any particular provision of this Agreement shall not affect the other provision hereof. This Agreement shall be construed in all respects as if such invalid or unenforceable provisions were omitted.
- G. This Agreement supersedes any and all other understandings or agreements, whether written or oral and constitutes the complete and full agreement between the parties and may be modified only by the written agreement of Employee and the City Manager.

IN WITNESS WHEREOF, the parties hereto have set their hands and seals as of the day and year first above written.

CITY OF BELLE ISLE, FLORIDA

Nicholas Fouraker, Mayor

Bob Francis, City Manager

Yolanda Quiceno, Employee



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Executive Search Firm for City Manager Recruitment

Background: The process for recruiting and hiring a City Manager can be complex. To assist cities with this task, the City could hire an Executive Search Firm. The Town of Oakland is currently recruiting a Town Manager. Oakland hired the firm of Colin Baenziger and Associates and executed a contract with them. Baenziger is one of the leading firms for local government jobs and their client list is extensive.

The City Manager contacted Oakland and requested that Oakland allow Belle Isle to piggyback off their contract with Baenziger. This will allow the City to quickly move forward with a search for its next City Manager. .

Staff Recommendation: Move forwards with Baenziger & Associates

Suggested Motion: I move we approve an Agreement with Colin Baenziger & Associates to conduct a City Manager search as outlined in the agreement and information provided by Oakland.

Alternatives: Do not approve and conduct a search for another firm or have the City do its own search.

Fiscal Impact: \$32,000 from General Fund

Attachments: Agreement

Typical Work Plan - Summarized

The following outlines the process Colin Baenziger & Associates undertakes in performing a City Manager Search.

Phase I: Needs Assessment / Information Gathering

- Conduct discussions with the elected and other key officials to:
 - Develop a description of the ideal candidate,
 - Learn the issues the next City Manager will face,
 - Gather materials and information to share with potential candidates,
 - Understand what compensation package the City is prepared to offer, and
 - Develop and finalize a project schedule.
- Develop materials we will utilize to recruit candidates.

Phase II: Candidate Recruitment

- Actively search for, identify, and recruit outstanding candidates whom we feel are best suited for the position. We also focus on ensuring we have a diverse field of candidates.
- Distribute the recruiting materials to appropriate publications and websites, including our own.
- Consult our database of strong candidates, contact them, and encourage them to apply.
- E-mail the advertisement to our database of local government professionals.

Phase III: Candidate Review and Selection of Finalists

- Evaluate applications that result from our recruiting efforts and from our advertisements.
- Identify the eight to twelve semi-finalists who we believe are most qualified.
- Conduct thorough reference and background investigations on the selected semi-finalists. When we do our investigations, we do not simply accept the references the candidates suggest. We tell the candidates whom we want to speak with. These might include elected officials, the city/county attorney, representatives of the local press, community leaders, peers, and subordinate employees. Our goal is to get comments from at least eight references for each candidate. We also conduct criminal, civil, driver license, media (both traditional and social), and credit checks, and we verify employment history and education. We believe these should be completed early in the process to avoid embarrassment after a selection has been made.

Typical Work Plan - Summarized

- We will recommend six to eight top candidates to the City for your consideration. We will review these candidates with the City. Along with our recommendation, we will provide the results of our background research electronically.

Phase IV: Interviews and Selection

- We will work with the City to develop the evaluation/interview process, coordinate the process, and attend the actual interviews.
- Once the interviews have been completed, we will provide any additional information the City may wish and assist in any way the City desires in making the final determination.

Phase V: Contract Negotiation

- If requested, we will assist in the negotiation of an employment agreement with the selected candidate.

Timeframe

The typical elapsed time of our searches is 75 to 90 days from the date of notice to proceed. Efforts to shorten the search schedule significantly increase the likelihood of complications. Oddly, the result is often that searches are elongated rather than shortened.

TOWN OF OAKLAND, FLORIDA,
AGREEMENT FOR EXECUTIVE RECRUITMENT SERVICES

THIS AGREEMENT FOR EXECUTIVE RECRUITMENT SERVICES (hereinafter "Agreement") is made and entered into this 2nd day of March, 2023, by and between the TOWN OF OAKLAND, FLORIDA, a Florida municipal corporation, (hereinafter the "Town"), and COLIN BAENZIGER & ASSOCIATES, a Florida registered fictitious name, (hereinafter the "Contractor").

WITNESSETH:

WHEREAS, is a political subdivision of the State of Florida, having a responsibility to provide certain services to benefit the citizens of the TOWN OF OAKLAND, FLORIDA; and

WHEREAS, the TOWN has the full power and authority to enter into the transactions contemplated by this Agreement; and

WHEREAS, the TOWN is in need of executive recruitment services, and the CONTRACTOR is in the business of providing executive recruitment services; and

WHEREAS, the CONTRACTOR agrees to provide such services as more particularly described in this Agreement, as well as in any proposal documents issued in connection with this project; and

WHEREAS, Section 119.0701, Fla. Stat., requires that certain public agency contracts must include certain statutorily required provisions concerning the contractor's compliance for Florida's Public Records Act; and

WHEREAS, Section 768.28, Fla. Stat., sets forth certain mandatory limitations on indemnification and liability for Florida public agencies; and

WHEREAS, Florida law requires that public agency contracts be subject to non-appropriation and thereby contingent upon appropriation during the public agency's statutorily mandated annual budget approval process; and

WHEREAS, Section 448.095, Fla. Stat., imposes certain obligations on public agencies with regard to the use of the E-Verify system by their contractors and subcontractors; and

WHEREAS, Section 287.135, Fla. Stat., provides restrictions on local governments contracting with companies that are on certain Scrutinized Companies lists.

NOW, THEREFORE, in consideration of the covenants set forth herein, the parties agree as follows:

1. Recitals. The foregoing recitals are true and correct, constitute a material inducement to the parties to enter into this Agreement, and are hereby ratified and made a part of this Agreement.

2. Description of Work.

- a. The TOWN hereby retains CONTRACTOR to furnish services as described in Exhibit "A" ("Proposal to Provide Executive Recruitment Services for the Town of Oakland, FL" or "Proposal"), which is attached hereto and incorporated herein by reference. The Proposal is hereby incorporated into this Agreement by reference and is declared to be material part of this Agreement. Any conflict between the terms and conditions in the body of this Agreement and the terms and conditions set forth in Exhibit "A" will be resolved in favor of the body of this Agreement.
- b. CONTRACTOR must provide all permits, labor, materials, equipment, and supervision necessary for the completion of the Proposal, unless specifically excluded.

3. Commencement and Completion/Term.

- a. CONTRACTOR must commence work under this Agreement immediately upon receipt by CONTRACTOR of the Notice to Proceed, and shall continue such work until otherwise directed by the TOWN or as provided in this Agreement. The term of this Agreement shall not exceed 12 months without additional prior authorization by the Town Commission.

4. Payment.

- a. The TOWN agrees to compensate CONTRACTOR, for work actually performed under this Agreement and described in the Proposal, at the rate specified in Section V of Exhibit "A" attached hereto. CONTRACTOR shall provide an invoice describing all work done pursuant to the Proposal prior to payment each month. In no event will CONTRACTOR be paid more than a total of \$32,500 without additional prior authorization by the Town Commission.
- b. The TOWN reserves the right to ratably withhold amounts in the event of the nonperformance of all or part of CONTRACTOR's obligations. CONTRACTOR must, without additional compensation, correct and revise any errors, omissions, or other deficiencies in its work product, services, or materials arising from the error or omission or negligent act of CONTRACTOR.

5. Termination.

- a. Termination at Will: This Agreement may be terminated by the TOWN in whole or in part at any time without cause by the TOWN giving written notice to CONTRACTOR not less than 30 days prior to the date of termination; provided,

however, that in such event, neither party will be relieved from its rights or obligations of this Agreement through the date of the actual termination. Notice must be delivered by certified mail, return receipt requested, or in person with proof of delivery.

- b. Termination for Cause: This Agreement may be terminated by either party for cause by the TOWN or CONTRACTOR giving written notice to the other party not less than 10 days prior to the date of termination; provided, however, that in such event, neither party will be relieved from its rights or obligations of this Agreement through the date of the actual termination. Notice must be delivered by certified mail, return receipt requested, or in person with proof of delivery.

6. Project Management.

- a. The Project Managers for this Agreement are as follows. Any subsequent changes to the Project Manager for either party may be provided by notice as described herein and does not require an amendment to this Agreement.

TOWN: Elise Hui, Town Clerk
 Contact information: PO Box 98, Oakland, FL, 34760
EHui@oaklandfl.gov, (407)656-1117, ext. 2104

CONTRACTOR : Colin Baenziger & Associates
 Contact information: Colin Baenziger, (561) 707-3537 or Colin@cb-asso.com

7. **Notices.** All notices to the parties under this Agreement must be in writing and sent certified mail to:

TOWN: Elise Hui, Town Clerk, PO Box 98, Oakland, FL, 34760

CONTRACTOR : Colin Baenziger & Associates,
 c/o Colin Baenziger,
 2055 South Atlantic Avenue, Suite 504,
 Daytona Beach Shores, FL 32118

8. Insurance.

- a. CONTRACTOR shall indemnify the Town for any and all claims under any Workers Compensation Act or Employers Liability Laws, and from any and all other claims of whatsoever kind or nature to the damage or property, or for personal injury, including death, made by anyone whomsoever, that may arise from operations carried on under this Agreement, either by CONTRACTOR, any subcontractor, or by anyone directly or indirectly engaged or employed by either of them.

- b. CONTRACTOR shall obtain and maintain insurance coverage in amounts not less than:
 - i. Workers' Compensation (unless exempt) with Employers' Liability with a limit of \$500,000.00 each accident, \$500,000.00 each employee, \$500,000.00 policy limit for disease;
 - ii. Commercial General Liability (CGL) insurance with a limit of not less than \$300,000.00 each occurrence. If such CGL insurance contains a general aggregate limit, it shall apply separately to this project in the amount of \$600,000.00. CGL insurance shall be written on an occurrence form and include bodily injury and property damage liability for premises, operations, independent contractors, products and completed operations, contractual liability, broad form property damage and property damage resulting from explosion, collapse or underground (x, c, u) exposures, personal injury, and advertising injury. Damage to rented premises shall be included at \$100,000.00;
 - iii. Commercial Automobile Liability Insurance with a limit of not less than \$300,000.00 each accident for bodily injury and property damage liability. Such insurance shall cover liability arising out of any auto (including owned, hired and non-owned autos) and such policy shall be endorsed to provide contractual liability coverage; and
 - iv. Fire damage liability shall be included at \$300,000.00.
- c. CONTRACTOR must furnish the TOWN with Certificates of Insurance, which are to be signed by a person authorized by that insurer to bind coverage on its behalf. The TOWN is to be specifically included as an additional insured and loss payee on all policies except Workers' Compensation. In the event the insurance coverage expires prior to the completion of the project, a renewal certificate must be issued 30 days prior to the expiration date. The policy must provide a 30 day notification clause in the event of cancellation or modification to the policy. All certificates of insurance must be on file with and approved by the TOWN before commencement of any work activities.
- d. The insurance coverages procured by CONTRACTOR as required herein will be considered as primary insurance over and above any other insurance, or self-insurance, available to CONTRACTOR, and any other insurance, or self-insurance available to CONTRACTOR will be considered secondary to, or in excess of, the insurance coverage(s) procured by CONTRACTOR as required herein.

9. Compliance with Laws. In providing the services specified in the Proposal, CONTRACTOR must comply with all federal, state, and local laws, statutes, ordinances, rules, and regulations pertaining to or regulating the provision of such services, including those now in effect and hereafter adopted.

10. Personal Nature of Agreement; Assignment. The parties acknowledge that the TOWN places great reliance and emphasis upon the knowledge, expertise, training, and personal abilities of CONTRACTOR. Accordingly, this Agreement is personal, and

CONTRACTOR is prohibited from assigning or delegating any rights or duties hereunder without the specific written consent of the TOWN. If CONTRACTOR requires the services of any subcontractor or professional associate in connection with the work to be performed under this Agreement, CONTRACTOR must obtain the written approval of the TOWN Project Manager prior to engaging such subcontractor or professional associate. CONTRACTOR will remain fully responsible for the services of any subcontractors or professional associates.

11. Discrimination. CONTRACTOR shall not discriminate against any employee employed in the performance of this Agreement and the Proposal, or against any applicant for employment because of age, ethnicity, race, religious belief, disability, national origin, or sex. CONTRACTOR shall not exclude any person, on the grounds of age, ethnicity, race, religious belief, disability, national origin, or sex, from participation in, denied the benefits of, or be otherwise subjected to discrimination in any activity under, this Agreement or the Proposal. CONTRACTOR shall provide a harassment-free workplace, with any allegation of harassment given priority attention and action by management.

12. Independent Contractor. CONTRACTOR is, and will be deemed to be, an independent contractor and not a servant, employee, joint adventurer, or partner of the TOWN. None of CONTRACTOR's agents, employees, or servants are, or will be deemed to be, the agent, employee, or servant of the TOWN. None of the benefits, if any, provided by the TOWN to its employees, including but not limited to, compensation insurance and unemployment insurance, are available from the TOWN to the employees, agents, or servants of CONTRACTOR. CONTRACTOR will be solely and entirely responsible for its acts and for the acts of its agents, employees, servants, and subcontractors during the performance of this Agreement. Although CONTRACTOR is an independent contractor, the work contemplated herein must meet the approval of the TOWN and is subject to the TOWN's general right of inspection to secure the satisfactory completion thereof. CONTRACTOR must comply with all Federal, State and municipal laws, rules and regulations that are now or may in the future become applicable to CONTRACTOR, or to CONTRACTOR's business, equipment, or personnel engaged in operations covered by this Agreement or accruing out of the performance of such operations. The TOWN will not be held responsible for the collection of or the payment of taxes or contributions of any nature on behalf of CONTRACTOR. CONTRACTOR will bear all losses resulting to it on account of the amount or character of the work, or because of bad weather, or because of errors or omissions in its contract price.

13. Indemnification. CONTRACTOR must indemnify and hold the TOWN harmless against and from any and all claims, losses, penalties, interest, demands, judgments, costs, damages, or expenses, including attorney's fees and court costs, incurred by the TOWN, or its agents, officers, or employees, arising directly or indirectly from CONTRACTOR's performance under this Agreement or by any person on CONTRACTOR's behalf, including but not limited to those claims, losses, penalties, interest, demands, judgments, costs, damages, or expenses arising out of any accident, casualty, or other occurrence causing injury to any person or property. This includes persons employed or utilized by CONTRACTOR (including CONTRACTOR's agents, employees, and subcontractors). CONTRACTOR must further indemnify the TOWN against any claim that any product purchased or licensed by the TOWN from CONTRACTOR under this Agreement infringes a United States patent, trademark, or

copyright. CONTRACTOR acknowledges that CONTRACTOR has received consideration for this indemnification, the sufficiency of such consideration being acknowledged by CONTRACTOR, by CONTRACTOR's execution of this Agreement. CONTRACTOR's obligation will not be limited by, or in any way to, any insurance coverage or by any provision in or exclusion or omission from any policy of insurance, whether such insurance is in connection with this Agreement or otherwise. Such indemnification is in addition to any and all other legal remedies available to the TOWN and not considered to be the TOWN's exclusive remedy. In the event that any claim in writing is asserted by a third party which may entitle the TOWN to indemnification, the TOWN must give notice thereof to CONTRACTOR, which notice must be accompanied by a copy of statement of the claim. Following the notice, CONTRACTOR has the right, but not the obligation, to participate at its sole expense, in the defense, compromise or settlement of such claim with counsel of its choice. If CONTRACTOR does not timely defend, contest, or otherwise protect against any suit, action or other proceeding arising from such claim, or in the event the TOWN decides to participate in the proceeding or defense, the TOWN will have the right to defend, contest, or otherwise protect itself against same and be reimbursed for expenses and reasonable attorney's fees and, upon not less than ten (10) days notice to CONTRACTOR, to make any reasonable compromise or settlement thereof. In connection with any claim as aforesaid, the parties hereto must cooperate fully with each other and make available all pertinent information necessary or advisable for the defense, compromise or settlement of such claim. The indemnification provisions of this paragraph will survive the termination of this Agreement.

14. Public Records Compliance. Contractor agrees that, to the extent that it may "act on behalf" of the Town within the meaning of Section 119.0701(1)(a), Florida Statutes in providing its services under this Agreement, it shall:

- a. Keep and maintain public records required by the public agency to perform the service.
- b. Upon request from the public agency's custodian of public records, provide the public agency 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 this chapter or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the contractor or keep and maintain public records required by the public agency to perform the service. If the contractor transfers all public records to the public agency upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the Town's custodian of public records, in a format that is compatible with the information technology systems of the Town.

- e. Pursuant to Section 119.0701(2)(a), Fla. Stat., **IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

**TOWN HALL
TOWN OF OAKLAND
P.O. BOX 98
OAKLAND, FLORIDA 34760
407-656-1117, EXT. 2104
EHUI@OAKLANDFL.GOV**

15. Public Records Compliance Indemnification. Contractor agrees to indemnify and hold the Town harmless against any and all claims, damage awards, and causes of action arising from the Contractor's failure to comply with the public records disclosure requirements of Section 119.07(1), Florida Statutes, or by contractor's failure to maintain public records that are exempt or confidential and exempt from the public records disclosure requirements, including, but not limited to, any third party claims or awards for attorneys' fees and costs arising therefrom. Contractor authorizes the public agency to seek declaratory, injunctive, or other appropriate relief against Contractor in Orange County Circuit Court on an expedited basis to enforce the requirements of this section.

16. Compliance/Consistency with Section 768.28, Fla. Stat. Any indemnification or agreement to defend or hold harmless by Town specified in the Agreement shall not be construed as a waiver of Town's sovereign immunity, and shall be limited to such indemnification and liability limits consistent with the requirements of Section 768.28, Fla. Stat. and subject to the procedural requirements set forth therein. Any other purported indemnification by Town in the Agreement in derogation hereof shall be void and of no force or effect.

17. Non-appropriation. Town's performance and obligation to pay under this Agreement is contingent upon an appropriation during the Town's annual budget approval process. If funds are not appropriated for a fiscal year, then the Contractor shall be notified as soon as is practical by memorandum from the Town Manager or designee that funds have not been appropriated for continuation of the Agreement, and the Agreement shall expire at the end of the fiscal year for which funding has been appropriated. The termination of the Agreement at fiscal year end shall be without penalty or expense to the Town subject to the Town paying all invoices for services rendered during the period the Agreement was funded by appropriations.

18. E-Verify Compliance. Contractor affirmatively states, under penalty of perjury, that in accordance with Section 448.095, Fla. Stat., Contractor is registered with and uses the E-Verify system to verify the work authorization status of all newly hired employees, that in accordance with such statute, Contractor requires from each of its subcontractors an affidavit

stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien, and that Contractor is otherwise in compliance with Sections 448.09 and 448.095, Fla. Stat.

19. Compliance/Consistency with Scrutinized Companies Provisions of Florida Statutes. Section 287.135(2)(a), Florida Statutes, prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services of any amount if, at the time of contracting or renewal, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, or is engaged in a boycott of Israel. Section 287.135(2)(b), Florida Statutes, further prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services over one million dollars (\$1,000,000) if, at the time of contracting or renewal, the company is on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, both created pursuant to section 215.473, Florida Statutes, or the company is engaged in business operations in Cuba or Syria. Contractor hereby certifies that Contractor is not listed on any of the following: (i) the Scrutinized Companies that Boycott Israel List, (ii) Scrutinized Companies with Activities in Sudan List, or (iii) the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Contractor further hereby certifies that Contractor is not engaged in a boycott of Israel or engaged in business operations in Cuba or Syria. Contractor understands that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject Contractor to civil penalties, attorney's fees, and/or costs. Contractor further understands that any contract with Town for goods or services of any amount may be terminated at the option of Town if Contractor (i) is found to have submitted a false certification, (ii) has been placed on the Scrutinized Companies that Boycott Israel List, or (iii) is engaged in a boycott of Israel. And, in addition to the foregoing, if the amount of the contract is one million dollars (\$1,000,000) or more, the contract may be terminated at the option of Town if the company is found to have submitted a false certification, has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Cuba or Syria.

20. Venue and Jurisdiction. Notwithstanding any of other provision to the contrary, this Agreement and the parties' actions under this Agreement shall be governed by and construed under the laws of the state of Florida, without reference to conflict of law principles. As a material condition of this Agreement, each Party hereby irrevocably and unconditionally consents to submit and does submit to the jurisdiction of the Circuit Court in and for Orange County, Florida for any actions, suits or proceedings arising out of or relating to this Addendum or the Agreement.

21. Additional Terms. Notwithstanding any of other provision to the contrary, the parties agree as follows:

A. **Binding Nature of Agreement.** This Agreement is binding upon the successors and assigns of the parties hereto.

B. **Confidentiality.** The parties hereby acknowledge that the Town is a local governmental entity subject to public records law under Chapter 119, Florida Statutes. Notwithstanding any provisions to the contrary contained within the Agreement, the Town may disclose Confidential Information, including Personal Information, when such

information is disclosed under force of law (including Chapter 119, Florida Statutes), governmental regulation, or court order.

C. **Entire Agreement.** This Agreement states the entire understanding between the parties and supersedes any written or oral representations, statements, negotiations, or agreements to the contrary. CONTRACTOR recognizes that any representations, statements, or negotiations made by the TOWN staff do not suffice to legally bind the TOWN in a contractual relationship unless they have been reduced to writing, authorized, and signed by the authorized TOWN representatives.

D. **Amendment.** No modification, amendment, or alteration in the terms or conditions of this Agreement will be effective unless contained in a written document executed with the same formality as this Agreement.

E. **Severability.** If any term or provision of this Agreement is held, to any extent, invalid or unenforceable, as against any person, entity, or circumstance during the Term hereof, by force of any statute, law, or ruling of any forum of competent jurisdiction, such invalidity will not affect any other term or provision of this Agreement, to the extent that the Agreement will remain operable, enforceable, and in full force and effect to the extent permitted by law.

F. **Construction.** If any provision of this Agreement becomes subject to judicial interpretation, the court interpreting or considering such provision should not apply the presumption or rule of construction that the terms of this Agreement be more strictly construed against the party which itself or through its counsel or other agent prepared it. All parties hereto have participated in the preparation of the final form of this Agreement through review by their respective counsel, if any, or the negotiation of specific language, or both, and, therefore, the application of such presumption or rule of construction would be inappropriate and contrary to the intent of the parties.

G. **Headings.** All headings in this Agreement are for convenience only and are not to be used in any judicial construction or interpretation of this Agreement or any paragraph.

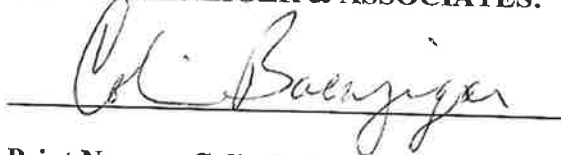
H. **Waiver.** The indulgence of either party with regard to any breach or failure to perform any provision of this Agreement does not constitute a waiver of the provision or any portion of this Agreement, either at the time the breach or failure occurs or at any time throughout the term of this Agreement. The review of, approval of, or payment for any of CONTRACTOR's work product, services, or materials does not operate as a waiver, and should not be construed as a waiver, of any of the TOWN's rights under this Agreement, or of any cause of action the TOWN may have arising out of the performance of this Agreement.

I. **Force Majeure.** Notwithstanding any provisions of this Agreement to the contrary, the parties will not be held liable if failure or delay in the performance of this Agreement arises from fires, floods, strikes, embargos, acts of the public enemy, unusually

severe weather, out break of war, restraint of government, riots, civil commotion, force majeure, act of God, or for any other cause of the same character which is unavoidable through the exercise of due care and beyond the control of the parties. This provision does not apply if the Proposal specifies that performance by CONTRACTOR is specifically required during the occurrence of any of the events herein mentioned.

IN WITNESS WHEREOF, the parties hereto have executed and delivered this instrument on the days and year indicated below and the signatories below to bind the parties set forth herein.

COLIN BAENZIGER & ASSOCIATES:

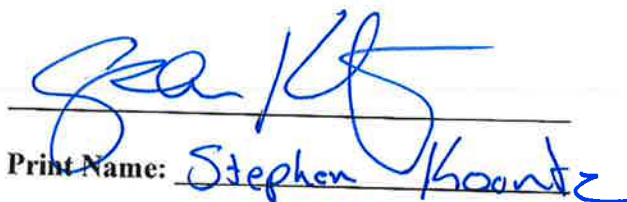


Print Name: Colin Baenziger

Title: Owner/Principal

Company: Colin Baenziger & Associates

TOWN OF OAKLAND, FLORIDA:



Print Name: Stephen Koontz

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING



**PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES
FOR
OAKLAND, FL**

Volume I: Proposal

Colin Baenziger & Associates

Contact Person:

Colin Baenziger (561) 707-3537
Colin Baenziger & Associates
2055 South Atlantic Avenue • Suite 504
Daytona Beach Shores, FL 32118
e-mail: Colin@cb-asso.com
Fax: (888) 635-2430

...Serving Our Clients with a Personal Touch...

PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES

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February 8, 2023

The Honorable Mayor Kathy Stark, Vice Mayor Michael Satterfield, and Commissioners Joseph McMullen, Rick Polland, and Salvador Ramos
Town of Oakland, FL
230 N Tubb Street
Oakland, FL 34760

The Honorable Mayor Stark, Vice Mayor Satterfield, and Commissioners McMullen, Polland, and Ramos:

Colin Baenziger & Associates (CB&A) would like to thank you for the opportunity to submit this proposal to assist in finding your next Town Manager. While selecting key personnel is never easy, CB&A has developed a problem-free process that has been tested across the country and found to be extremely effective.

While CB&A is a nationwide municipal recruiting firm, our home base is Florida. In fact, we have been selected to perform 127 of the last 191 recruitments where a Florida city or county has chosen to use a recruiter to find its Manager / Administrator. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients and candidates. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the elected officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and fit well with you and your community. As a result, we only take a few clients at a time and focus on completing each assignment in an exemplary manner. Further, we routinely complete our work in ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and selection. Finally, we offer one of the better warranties in the industry.

Some of our Florida searches include City Managers for Aventura, Bay Harbor Islands, Bradenton, Cape Coral, Cutler Bay, Destin, Estero, Fort Myers, Fruitland Park, Gainesville, Hallandale Beach, Islamorada, Lady Lake, Melbourne, Miramar, Mount Dora, Ocala, Orange City, Palm Beach

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING

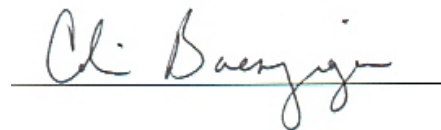
Gardens, Palmetto Bay, Palm Coast, St. Pete Beach, Tavares, Treasure Island, and West Melbourne. Nationally we have found City Managers for Ankeny, IA; Bellevue, WA; Doraville, GA; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also found the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia) as well as County Managers for Brevard County, FL; Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Polk County, IA; St. Lucie County, FL; St. Johns County, FL; and Union County, NC.

Some of our current searches include City/Town Managers for Cooper City, FL, Fircrest, WA, Fort Walton Beach, FL; City Attorney for Sebastian, FL; County Administrator for Indian River County, FL; a Landscaping Director for Estero, FL, and CEOs for Beaufort-Jasper Water & Sewer Authority, SC, and Sun 'n Lake Improvement District, FL.

Those authorized to bind the company are myself, Colin Baenziger, and Lynelle Klein, Vice President for Operations.

We look forward to formally presenting our credentials and working with you in the near future. If you have any questions, please feel free to contact me at (561) 707-3537.

Sincerely,



Colin Baenziger
Principal / Owner

...Serving Our Clients with a Personal Touch...

I. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

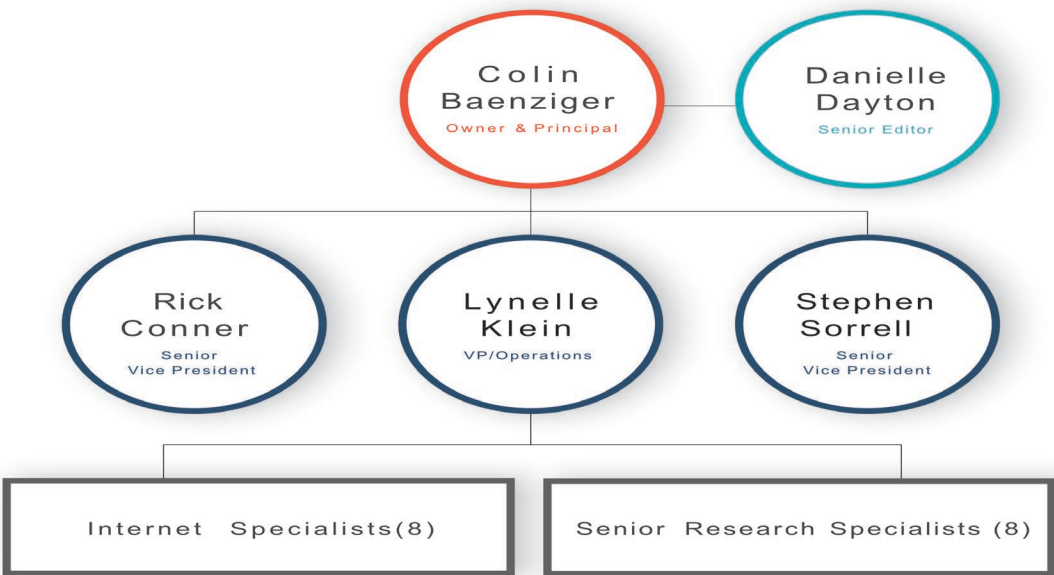
Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with satellite offices in Grand Junction, CO, and Pensacola, FL. As a sole proprietorship, we are not registered with any state as a corporation, foreign or otherwise.

Colin Baenziger & Associates’ outstanding reputation is derived from our commitment to the quality of our product and the timeliness of the delivery. Further, our work is not done until you are fully satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our action plan. When we do so, we do not ask for more than the originally quoted price. We feel you are hiring us as your experts and once a contract is signed, we have an obligation to fulfill its requirements with excellence, on time, and within budget. We simply do not believe in unforeseen circumstances.

Since beginning our executive search practice in 1998, we have conducted searches for clients in thirty-four states. Overall, we have sought over 230 CEOs for cities, counties, and special districts. We have also conducted over 415 searches overall. The basic approach outlined herein has been refined to the point where it is problem-free.

Technical Capabilities and Organizational Structure

Colin Baenziger & Associates has developed its business model over the past 26 years, and it has proved to be extremely effective. Our work has focused primarily on Executive Search and our staff is extremely capable and experienced. See Section III for more details. The structure of our firm is outlined below.



I. Qualifications and Experience of the Firm (continued)

Completion of Projects within Budget

Colin Baenziger & Associates is proud of its record of completing searches within budget. Once we quote a price to the client, that price is what the client will pay, no matter how difficult the search is or what circumstances may develop. *We have never requested anything beyond the originally quoted price, even when we were probably entitled to do so, and we never will.*

Completion of Projects on Schedule

Colin Baenziger & Associates routinely completes its assignments within ninety days. Further, since CB&A began performing recruitments, *it has never missed a significant project milestone.*

Diversity

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the Town. The proof is that from the beginning of 2009, 25% of the candidates selected as semi-finalists have been females and/or minorities. In one recent year, 47% of our placements were either females or minorities.

Prior Names and Litigation

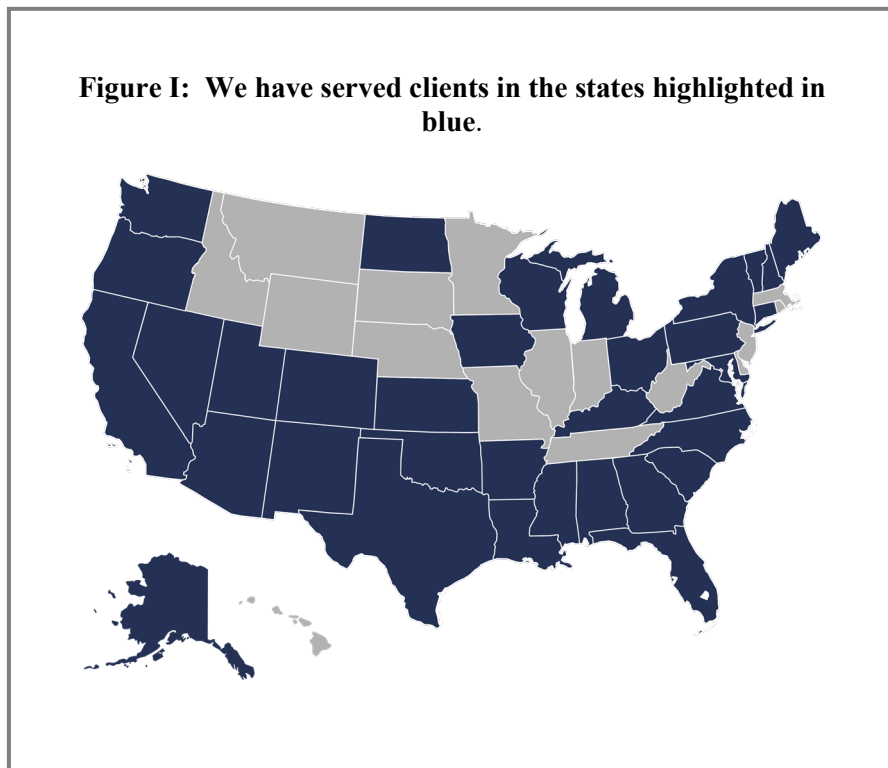
Colin Baenziger & Associates has always operated under its current name and has never been involved in any litigation, except to testify as an expert witness on behalf of one of the parties. Our performance has never been questioned nor have we or any of our clients been involved in any legal action as a result of our work.

Insurance

To protect our clients, Colin Baenziger & Associates maintains the following insurance coverages: (1) general liability insurance of \$1 million combined single limit per occurrence for bodily injury, personal injury, and property damages, (2) automobile liability insurance of \$1 million per accident, and (3) professional liability insurance of \$1 million per occurrence and \$2 million aggregate. As a small firm, predominantly utilizing independent contractors, we are not typically subject to the requirements for workers compensation and employer liability insurance in many states. If required by the client, and if it is available to us, we will obtain these coverages prior to contract execution.

Geographic Reach

Since initiating its search function in 1998, CB&A has become a nationwide recruiting firm. See Figure I below for the states we have conducted searches in. A complete list of our searches can be found in Appendix A.



II. Proposed Work Plan

The following search methodology has been refined over the past twenty-six years and is virtually foolproof. That said, we will integrate any ideas you have into the process to the extent possible. Our goal is to ensure you have the right people to interview as well as all the information you need to make the right decision.

Phase I: Information Gathering / Needs Assessment / Brochure Preparation

Task One: Needs Assessment

An important part of the recruiter's work is selling the community to the very best candidates (including those who are not actively looking for the next job) while providing an honest portrayal of the community and the opportunity. As such, CB&A must first determine the needs of the client and the characteristics of the ideal candidate. Our approach is as follows:

- Gather information from the jurisdiction, its website and other sources;
- Interview the elected body and other key parties (such as Town staff). Our goal is to develop a strong sense of your organization, its leadership, its short- and long-term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will include experience, longevity, education, personality, demeanor, skills, and achievements as well as other items you and the community consider important;
- Determine a reasonable compensation package; and
- Finalize the timeline with the Town so both the elected body and the candidates will know when the interviews will be held and when they need to be available.

If the Town wishes, we will gladly incorporate meetings with other stakeholders (such as the business community, non-profit organizations, the religious community, and so on) to gather their insights. We can also solicit the input of your residents through an on-line survey (see Appendix D for a sample).

Task Two: Develop Position Description and Recruitment Materials

Based on the information we gather, CB&A will next develop a comprehensive recruitment profile for your review. We will then incorporate any additional suggestions you may have and finalize the document. A sample profile is included as Appendix B. Other examples can be found on our firm's website under the "Executive Recruitments" / "Active Recruitments" tabs.

II. Proposed Work Plan (Continued)

Phase II: Recruitment

Task Three: Recruit Candidates

CB&A uses a number of approaches to identify the right people for your position. We say people (and not person) because our goal is to provide you with six to ten outstanding semi-finalists. You then select the top three to five people to interview and ultimately choose the candidate who is the best fit with you and your community. The approaches we use are:

- ***Networking:*** The best approach is diligent outreach. We will network with potential candidates and consult our data base of government professionals. Being well established in Florida, we know whom we should contact. As we identify outstanding candidates (many of whom are not in the market), we will approach them and request that they apply. Often excellent candidates are reluctant to respond to advertisements because doing so may alienate their current employers.
- ***Advertising:*** While we will network to find the best, we will not ignore professional organizations and trade press which sometimes yield strong candidates. These might include the International City/County Management Association, related state associations, the National Association of Counties, and sites aimed as female and minority candidates. LinkedIn is another vehicle we may use.
- ***CB&A Website:*** We will also post the recruitment on our website, www.cb-asso.com. With our reputation, many candidates consult it regularly.
- ***Email:*** We will e-mail the recruitment profile through our listserv of almost fourteen thousand managers and professionals who are interested in local government management positions. One of the advantages of e-mail is that if the recipient is not interested, he/she can easily forward the recruitment profile to someone else who may be interested.

We generally do not use local, newspapers, national newspapers or generic websites because while they produce large numbers of applications, they generally do not produce the caliber of candidates we are seeking. If the Town wants to have ads placed in these venues, it will need to bear the cost.

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

Based on our most recent recruiting efforts, we anticipate receiving resumes from forty to sixty applicants. We will use the information we developed in Phase I to narrow the field. Selecting strong candidates is, in reality, more of an art than a science and a mixture of in-depth research and subjective evaluation. While we consider standard ranking factors and the elements of the job, ultimately the most important factor is who we believe will be an outstanding fit with the Town and the community as your next Town Manager

II. Proposed Work Plan (Continued)

Specifically, our efforts will involve:

Step One. Resume Review. CB&A will evaluate all resumes and identify the eight to fifteen candidates of the highest quality.

Step Two. Screening Interview. Our lead recruiters, and possibly other senior representatives of the firm, will interview each of the top candidates. Using what we learned in Phase I and our experience as managers and recruiters, as well as our unique ability to assess candidates, we will determine whether to consider each candidate further.

Step Three. Evaluate the Best Candidates. We will conduct thorough research into the backgrounds of the best six to twelve candidates. Specifically, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to answer a series of questions about themselves as an adjunct to their resumes and cover letters. By so doing, (1) the candidates can tell their story *in their own words*, and balance the negativity that is so often characteristic of the press, and (2) the Town to evaluate the candidates written communication skills.
- **Interviews of References:** We provide the candidate with the positions of the references with whom we wish to speak. These will include current and former elected officials, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, the Human Resources Director they work with, and others who know the candidate. All told, the list will include approximately 20 individuals. We will also attempt to contact some individuals who are not on the candidate's list. Typically, we reach eight to twelve people and prepare a written approximately page long summary of each conversation.
- **Legal Checks:** Through our third-party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state and national level; civil records for litigation at the county and federal level; motor vehicle records; and bankruptcy and credit. As an aside, while only police departments have access to the gold standard for criminal records (the NCIC data base), our vendor has developed a very reliable substitute.
- **Search the Internet, Newspaper Archives, and Social Media:** Virtually every local newspaper has an electronic archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the governing body. Of course, not all news sources are unbiased, and we consider that in our evaluation. Further, we will review the candidate's social media accounts.
- **Verification of Education and Work History:** We will verify all claimed educational degrees as well as the candidate's work history for the past 15 years to assure the candidate has been completely forthright.

II. Proposed Work Plan (Continued)

- **Candidate Disclosure Statement:** We ask candidates to disclose anything controversial in their background that we need to be aware of. While it is unlikely that they will disclose anything we are not already aware of at this point, we believe redundant checks are beneficial.

As part of our efforts, we will crosscheck sources, search for discrepancies, and resolve them. When sensitive or potentially embarrassing items are discovered, they will be thoroughly researched. Depending on what we discover, we may decide to drop the candidate or to present them with an explanation.

Note: We firmly believe that all background work and checks should be completed prior to presenting them to you. That way you will know the individuals you select to interview are all top performers and do not have anything embarrassing in their pasts that might come to light after selection. It also means that once you have made a selection, you can move forward promptly, negotiate a contract and make an announcement.

Task Five: Preparation and Presentation of Candidate Materials

CB&A will select six to ten candidates and present them for your consideration as finalists. We will provide to you electronically a complete written report for each recommended candidate which will include: the candidate's cover letter, resume, introduction, references, background checks and internet / newspaper archive search results. A complete sample candidate report is included as Appendix C. We will also provide advice on interviewing, a series of questions the elected officials may wish to ask (as well as outlining some areas that it is not wise to get into), and some logistical information.

Task Six: Finalist Selection

Approximately a week after the Town has received the candidate materials, CB&A will meet with the elected officials to discuss our findings and to select finalists (ideally five with an alternate) to be invited to interview.

Task Seven: Notify All Candidates of Their Status

We will notify the finalists by telephone and give them the opportunity to ask additional questions. Additionally, we will provide them with information concerning the interviews and travel if necessary.

CB&A will also contact those not selected to be interviewed. Part of the notification will include advice concerning their application materials, even though they were not selected to go forward, they will have gained something valuable from participating in the process.

II. Proposed Work Plan (Continued)

Phase IV: Coordinate the Interview Process and Town Manager Selection

Task Eight: Coordinate the Candidate Assessment Process

Prior to the interviews, we will recommend an /evaluation process including mechanisms to assess the candidates' communication skills, interpersonal skills, and decision-making skills. Typically, we suggest the Commission observe the finalists in three settings: a social setting (since the selected candidate will frequently represent the Town at community functions), one-on-one interviews, and a Commission meeting.

Day #1: The finalists are given a tour of the community by a knowledgeable staff member or resident. Communities often also include a reception with the Town's senior staff at this point.

Later, that evening, the Commission can host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. As noted, your next Town Manager will, after all, represent your local government in a variety of venues. It is thus important to know how the individual will respond to your citizenry. The reception also serves as an icebreaker whereby the Commission Members and the candidates get to know one another informally.

Day #2: The next morning, each candidate will interview individually with each Commission Member for approximately 40 minutes. These meetings provide you with an opportunity to assess how the candidates might interact with you on an individual basis. Ultimately, Managers succeed or fail based on their interaction with the Commission and its individual members. One-on-one interviews are an excellent way to test that interaction.

After lunch, the Commission, as a group, will interview each finalist one at a time for approximately 30 minutes. Part of the interviews might include a PowerPoint presentation, so the Commission can observe the candidates' presentational skills.

We recommend you invite the finalists' spouses to the interviews, so they can become familiar and feel comfortable with the community.

Finally, if you it would make you feel more comfortable, we can recommend several third party management and personality assessment tools that the Town can use to provide additional input. They are available at a relatively small cost and are not included in our fee.

Task Nine: Debriefing and Selection

After the interviews are completed, we have developed a simple methodology that moves the elected body quickly and rationally to selecting your next Manager.

II. Proposed Work Plan (Continued)

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

If requested, we will assist in the employment agreement negotiations. Generally, a member of the elected body and the attorney conduct the actual negotiations while we provide advice and assistance concerning the compensation package and contract. We can also take the lead role in the negotiations if desired. We have a standard contract you are welcome to use with the selected candidate. Your attorney, of course, will prepare the final contract. Since the basic parameters will have been discussed with the candidates and the candidates have been thoroughly vetted, we expect prompt agreement.

Task Eleven: Continuing Assistance

Our work is not done when the contract is executed. We will stay in touch with you and your new Town Manager. Our goal is to be there to assist in resolving any issues that arise before they become intractable. We simply feel it is part of our job to assure a successful relationship.

Communications: We will provide weekly reports about the status of the search, in writing or by phone, depending upon your preference. At significant milestones we will make the reports in person. We are also available at any time, day or night, to address any questions you have along the way. To do so, we will provide you with our cellphone numbers and you should feel comfortable contacting us whenever you have a question whether it is directly related to the search or, for that matter, anything else related to local government. We are, in addition to being exceptional recruiters, students of local government, and can often provide insights and names of parties who have dealt a wide variety of issues, often with innovative solutions. We want to be responsive and to assist in any way we can.

The Town's Obligations

The Town will be responsible for providing the facilities for the interview process, coordinating lodging for candidates from outside the area, and making arrangements for the reception. The Town will also be responsible for reimbursing the candidates (and spouses, if invited) for all expenses associated with their travel, meals, and incidentals for the interview process.

II. Proposed Work Plan (Continued)

Proposed Project Schedule

We understand the Town wants to move quickly on this recruitment. We are uniquely positioned to do so based on our knowledge of and experience in Florida.

Phase I: Needs Assessment / Information Gathering

- March 1st: CB&A begins meeting with the Commission Members and other stake holders to understand the job and its challenges.
- March 14th: CB&A submits the draft of the full recruitment profile to the Town for its review.
- March 21st: Town provides comments on the recruitment profile.

Phase II: Recruiting

- March 24th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to almost 14,000 local government professionals.
- April 21st: Closing date for submission of applications.
- April 26th: CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

- May 22nd: CB&A forwards its reports and materials to the Town for the recommended candidates. These will include the candidates' cover letters, resumes and introduction as well as the results of our reference, background and Internet/newspaper archives/social media checks.
- May 30th: Town selects approximately five finalists and an alternate to interview.

Phase IV: Interview Process Coordination and Town Manager Selection

- June 8th: Town holds reception for the finalists.
- June 9th: One-on-one and full Commission interviews and decision.

Phase V: Negotiation, Warranty & Continuing Assistance

- Post-Selection: CB&A works with Town representatives and the selected candidate on an employment agreement.

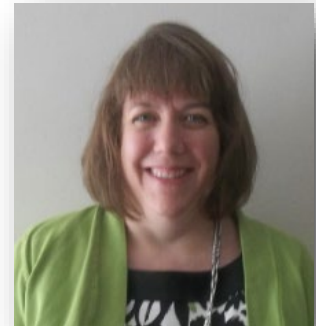
Project Team and Involvement

Colin Baenziger & Associates has assembled an outstanding project team to serve your needs.

Colin Baenziger will have overall responsibility for the execution of the search. Mr. Baenziger has spent ten years local government as a senior manager and over 30 years as a consultant. In addition to his 25 years in executive search, he specialized in operational reviews of governmental agencies and private sector clients such as the Recording Industry Association of America, and the Marriott Corporation. Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association.



Lynelle Klein, Senior Vice President for Operations, is a skilled professional with extensive expertise in executive search. Starting as a research assistant with CB&A 12 years ago, she has now firmly established herself as the number two person at CB&A. Prior to joining the firm, she worked primarily in the private sector providing financial and administrative services. Ms. Klein has an Associate's Degree from Brigham Young University in Rexburg, Idaho. She currently resides in Mesa County, CO.



Stephen Sorrell, Senior Vice President, brings over 35 years of management and technical experience in municipal, county, state, and special district agencies in addition to his work with Colin Baenziger & Associates (CB&A). Some of the leadership positions Steve has held include serving as Executive Director, Emerald Coast Utilities Authority in Pensacola, Florida, and as City Manager, Director of Public Safety, Assistant City Manager, and Director of Finance, all for Hamilton, Ohio. He is a P.E. and earned a Bachelor of Science in Civil Engineering Degree from the University of Dayton, Ohio, and Master of Public Administration Degree from the University of Cincinnati, Ohio. He is a member of the International City/County Management Association, Florida City/County Management Association, Florida Finance Officers Association, American Water Wastewater Association, President of the Exchange Club, President of the Safety Council, Chairman of the Neighborhood Watch Program, and served on the Board of Directors for Senior Services and the Chamber of Commerce. One day, he hopes to slow down – just not yet.



Rick Conner, Senior Vice President, has over 30 years of experience in executive recruiting and in local government (serving as a city manager in Florida and Texas) as well as a public works and utilities director. That experience provides him with an excellent perspective of the needs of local government operations and staffing. Rick earned Bachelor of Science Degrees in Business Administration and Engineering from the University of Missouri. He is a Registered Land Surveyor and a Professional Engineer in Missouri, as well as a Professional Engineer in Florida, Tennessee and Texas. In his spare time, he invents scuba diving equipment and accessories.



Town Manager, Bay Harbor Islands, FL (population 5,938)

Contact: Former Mayor and current Councilmember Stephanie Bruder at (305) 866-6241, or
sbruder@bayharborislands-fl.gov

CB&A began its work in May of 2020 to find Bay Harbor Islands' next Town Manager. Our work included searching the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the Town to interview. Through our targeted marketing and outreach efforts, we were able to bring an excellent pool of candidates to the Town. After careful deliberation, the Town selected *Maria Lasday, formerly the Village Manager for Bannockburn Village, IL* in August 2020. Ms. Lasday remains with the Village and is highly respected.



City Manager, Clewiston, FL (population 7,943)

Contact: Commissioner Mali Gardner at 863-983-1484, or
Mali.Gardner@clewiston-fl.gov

CB&A was hired in February 2019 to find Clewiston's next City Manager. We advertised the position, met with the Council and staff to learn what they were looking for, interviewed candidates, completed background checks, and recommended ten candidates to the City. The City eliminated four of the ten candidates and asked us to readvertise the position to add to the pool. We extended the application deadline, as requested and presented additional candidates to them for consideration. The individual they hired was included in the first ten candidates that we recommended. *Randy Martin, former Interim Manager for Emerald Isle, NC*, was selected in June 2019 and he remains with the City.



City Manager, Fruitland Park, FL (population 4,000)

Contact: Commissioner Chris Bell at (352) 326-4291 or
cbell@fruitlandpark.org

CB&A was hired in mid-July 2013 to find Fruitland Park's next **City Manager**. Rick Conner, CB&A's Senior Vice President assumed the Interim City Manager role in order to assist the City, stabilize the situation, and coordinate the recruitment. The process was challenging, but through extensive outreach efforts, CB&A fielded an excellent group of high quality candidates for the position, performed background checks, coordinated the interview process, and assisted the City in selecting *Gary LaVenía, former City Manager of Maple Shade, NJ*. By all reports, the City is exceptionally pleased with the placements. Mr. LaVenía remains with the City.



City Manager, Mascotte, FL (population 6,447)

Contact: Mayor Steven Sheffield at 352-536-4758, or
Steven.Sheffield@CityofMascotte.com

CB&A began work in January 2021. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, recommending finalists for the city to interview and helping with the contract negotiations. The process took longer than normal as Mascotte requested we host a citizen survey before we start the recruitment process. In addition, the selected candidate withdrew for personal reasons during contract negotiations and so we led a second recruitment process. *Annamarie Reno, former Township Manager for Richland Township, Michigan*, was selected on October 5, 2022. Ms. Reno remains with the City.



City Manager, Orange City, FL (population 11,569)

Contact: Mayor Gary Blair at (386) 775-5403 or
gblair@ourorangecity.com

CB&A began work in September 2015 to assist the city in finding its next **Manager**. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, recommending finalists for the city to interview and helping with the contract negotiations. *Dale Arrington, former Assistant City Manager for DeLand, Florida*, was selected on January 9, 2016. The announcement of the selection led to applause from the audience waiting in council chambers. She remains with the City.



City Manager, Sanibel, FL (population 7,319)

Contact: Mayor Holly Smith at 239.707.4800, or
Holly.Smith@mysanibel.com

CB&A was hired in July 2021 to find Sanibel's next **City Manager**. Sanibel Island is unique because it incorporated in 1974 to protect the natural aspects of the area and the community's small town feel. Sanibel was looking for a manager who would protect Sanibel for the long term and continue the goals in their vision statement. Our efforts involved searching the country for strong candidates, conducting extensive background checks, recommending a strong field of candidates, overseeing the interviews and providing assistance with the contract negotiations. *Dana Souza, formerly the Interim City Manager of Naples, FL*, was selected in late September. Mr. Souza remains with the City.



City Manager, Satellite Beach, FL (population 10,100)

Contact: Former Mayor Frank Catino at (321) 223-7700, or
fcatinio@satellitebeach.org

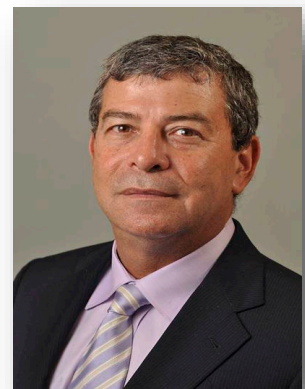
Satellite Beach retained CB&A just after Christmas, 2012 to help find its next **City Manager**. We began work immediately by meeting with the Council Members and based on what we learned, we crafted a recruitment profile. We searched the country for outstanding candidates. Background checks were thorough and four finalists were selected. Interviews were held on March 15th and 16th and *Courtney Barker, formerly Executive Director of the Planning and Growth Management Department for Titusville, FL*, was selected on the March 21st. Ms. Barker remains with the City.



City Manager, St. Pete Beach, FL (population 9,700)

Contact: Mayor Al Johnson at (727) 543-2794
or ajohnson@stpetebeach.org

We began our work in November of 2018 to find the next City Manager for St. Pete Beach. Located on a barrier island in the Gulf of Mexico just west of Tampa/St. Petersburg in Pinellas County, St. Pete Beach is a special place. Our work included searching the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the county to interview. In February 2019 the Board selected *Alex Rey, formerly the Town Manager for Miami Lakes, FL*. Mr. Rey remains with the City and in 2021 he received unbridled praise along with a contract extension that included a 5% salary increase and a \$500 a month housing stipend.



City Manager, West Park, FL (population 13,700)

Contact: Former Mayor Eric Jones at (954) 410-8139

West Park is a relatively new city in Broward County, FL. CB&A began meeting with the City's elected officials on January 13, 2010 to find its next **City Administrator**. It was critical to the Council that the finalists all understand the character of the community and be able to function well in an urban environment. The City also wanted a panel of local City Managers to review the finalists and to make recommendations concerning CB&A's finalists (which elongated the process slightly). Interviews were conducted on April 16th and 17th with *Ajibola Balogun, formerly the City Manager of South Miami* being selected on April 21st 2010. Mr. Balogun remains with the City.



Candidate References

While it is important to deliver what the Town expects, it is also important to keep candidates informed and to treat them with respect and dignity. Accordingly, we have provided references from four of those candidates.

Placement	Formerly	Recruited To Be	Contact at
Dale Martin	City Manager Winchester, CT	City Manager Fernandina Beach, FL, in September 2015	(904) 557-5047 dmartin@fbfl.org
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June, 2014, she left in March 2020 to become the Deputy City Manager for Greenville, SC, and then returned to Sandy Springs as the City Manager in January 2022	(404) 683-4816
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014 Hired as the Fairfax County, VA, CEO in January 2018	(843) 368-7458
Chris Morrill	Assistant City Manager, Savannah, GA	City Manager, Roanoke, VA Appointed December 2009 Hired as the Executive Director of the Government Finance Officers Association in February 2017	(843) 368-7458

Fee

CB&A offers a firm, fixed price of \$32,500, which includes all the expenses we will incur in the search with one exception. The Town will make a reservation and pay for one night's stay for the CB&A representative in the same hotel as the finalists when they come to interview for the Town Manager position so we can help facilitate the final stage of the recruitment process. The only other expenses the Town will incur are those associated with bringing the finalists (and spouses, if invited) to interview with the Town (travel, meals, hotel etc.). Bills will be rendered as the search progresses and due at the end of each Phase as indicated below:

Requested Services	
Phase I: Needs Analysis / Information Gathering	\$ 4,000
Phase II: Recruiting	14,000
Phase III: Screening	12,000
Phase IV: Interview Process Coordination and Selection	1,500
Phase V: Negotiation and Warranty	1,000
Firm, Fixed Fee Total*	\$32,500

If the Town asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of \$150 per hour. No such work will be performed without your written authorization. Please note, as previously stated, that we have never billed nor requested additional funds beyond our originally quoted fee – even when circumstances suggested we were entitled to them and where the work we performed extended beyond the scope of our assignment.

Warranty

Colin Baenziger & Associates offers one of the best warranties in the industry. We can offer it because we have confidence in our work. Provided we conduct the full search (Phases I-V), follows our recommendations, and selects from among the candidates we recommend, we warrant the following:

- 1) We will not approach the selected candidate for any other position as long as the individual is employed by the Town.
- 2) If the selected individual leaves for any reason other than an Act of God (such as total incapacitation or death) within the first year, CB&A will repeat the search for the reimbursement of our expenses only.
- 3) If you are not satisfied with the candidates we present, CB&A will repeat the search until you are satisfied.
- 4) Our price is guaranteed and will not be exceeded for any reason, even if conditions change after the contract is executed.

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING



PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES FOR OAKLAND, FL

Volume II: Appendices

Colin Baenziger & Associates

Contact Person:

Colin Baenziger (561) 707-3537
Colin Baenziger & Associates
2055 South Atlantic Avenue • Suite 504
Daytona Beach Shores, FL 32118
e-mail: Colin@cb-asso.com
Fax: (888) 635-2430

...Serving Our Clients with a Personal Touch...

**PROPOSAL To Be The Town’s
EXECUTIVE RECRUITING FIRM**

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Appendix A

*Searches by
Colin Baenziger & Associate' Staff*

Governmental Search Assignments

Current Searches

City Manager, Cooper City, FL (population 33,867)

City Manager, Fircrest, WA (population 7,174)

County Administrator, Indian River County, FL (population 163,662)

City Manager, Fort Walton Beach FL (population 20,879)

City Attorney, Sebastian, FL (population 23,700)

Landscaping Director, Estero, FL (population 33,450)

General Manager, Beaufort-Jasper Water & Sewer Authority, SC (population served 150,000)

General Manager, Sun 'n Lake Improvement District, FL (population served 9,000+)

Completed Searches in 2023

Town Manager, Juno Beach, FL (population 3,770)

Town Manager/Finance Director, Ocean Ridge, FL (population 1,830)

County Administrator, St. Lucie County, FL (population 343,579)

Governmental Search Assignments (continued)

Completed Searches Prior to 2023

City/Town/Village Manager/Administrator

City Manager, Albany, GA (population 75,600) in 2011
 City Manager, Ankeny, IA (population 45,600) in 2013
 City Manager, Ashland, KY (population 21,000) in 2013
 City Manager, Auburn, AL (population 58,582) in 2017
 City Manager, Aventura, FL (population 37,724) in 2017 and 2018
 Village Manager, Bal Harbour, FL (population 3,300) in 2013
 City Manager, Bartow, FL (population 16,000) in 2007 in 2017 and 2022
 Town Manager, Bay Harbor Islands, FL (population 5,628) in 2003, 2007 and 2020
 City Manager, Bellevue, WA (population 122,400) in 2014
 City Administrator, Bradenton, FL (population 60,888) in 2021
 City Manager, Brighton, CO (population 41,254) in 2020
 Town Manager, Buckeye, AZ (population 32,000) in 2006
 City Manager, Burien, WA (population 55,188) in 2017
 City Manager, Cape Canaveral, FL (population 10,200) in 2010
 City Manager, Cape Coral, FL (population 194,570) in 2012 and 2020
 City Manager, Carnation, WA (population 1,873) in 2017
 City Manager, Casselberry, FL (population 25,000), in 2005
 City Manager, Chamblee, GA (population 17,000) in 2011
 City Manager, Clewiston, FL (population 7,270) in 2019
 City Manager, Cocoa Beach, FL (population 11,200) in 2012, 2015 and 2016
 City Administrator, Connell, WA (population 4,200) in 2014
 City Manager, Cooper City, FL (population 32,000) in 2008
 City Manager, Coral Gables, FL (population 43,000) in 2009
 City Manager, Cottonwood Heights, UT (population 34,000) in 2004
 City Manager, Covington, VA (population 5,802) in 2016
 City Manager, Crescent City, FL (population 1,542) in 2020
 Town Manager, Cutler Bay, FL (population 35,000) in 2006
 City Manager, Dania Beach, FL (population 28,000) in 2009
 City Manager, Danville, VA (population 43,000) in 2016
 City Manager, Deerfield Beach, FL (population 78,000) in 2019
 City Manager, Delray Beach, FL (population 64,100) in 2014
 City Manager, Deltona, FL (population 83,000) in 2006 and 2008
 City Manager, Destin, FL (population 12,000) in 2003 and 2011
 City Administrator, Dickinson, ND (population 22,300) in 2018
 City Manager, Doral, FL (population 24,000), in 2004
 City Manager, Doraville, GA (population 10,896) in 2013, 2017 and 2020
 Town Manager, Dundee, FL (population 3,000) in 2006 and 2009
 City Manager, Ellensburg, WA (population 18,350) in 2014
 City Manager, Elmira, NY (population 29,200) in 2014
 Village Manager, Estero, FL (population 26,600) in 2015
 City Manager, Fairborn, OH (population 33,200) in 2017

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, Fayetteville, NC (population 208,000) in 2012
 City Manager, Fernandina Beach, FL (population 11,000) in 2006 and 2015
 City Manager, Fife, WA (population 8,700) in 2010
 City Manager, Fort Myers, FL (population 68,190) in 2016
 Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008
 City Manager, Fort Pierce, FL (population 41,900) in 2012
 City Manager, Fort Smith, AR (population 87,650) in 2016
 City Manager, Fruitland Park, FL (population 4,100) in 2013
 City Manager, Gainesville, FL (population 133,857) in 2016 and 2019
 City Manager, Greensboro, NC (population 259,000) in 2009
 City Manager, Groveland, FL (population 12,493) in 2018
 City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012
 City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)
 City Manager, Homestead, FL (population 62,000) in 2010
 City Manager, Indianola, IA (population 15,108) in 2015
 Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999, 2005, 2021 and 2022
 City Manager, Jacksonville Beach, FL (population 23,387) in 2018
 Town Manager, Juno Beach, FL (population 3,600) in 2005
 Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011
 City Manager, Key West, FL (population 24,600) in 2012
 Town Manager, Lady Lake, FL (population 15,954) in 2021
 City Administrator, Lake Forest Park, WA (population 13,059) in 2018
 Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003
 City Manager, Lake Worth Beach, FL (population 38,010) in 2003, 2007 and 2021
 Town Manager, Lantana, FL (population 9,600) in 2000 and 2021
 City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002
 City Manager, Leesburg, FL (population 20,390) in 2013
 City Manager, Madeira Beach, FL (population 12,300) in 2011
 Town Manager, Mangonia Park, FL (population 1,400) in 2001
 City Manager, Marathon, FL (population 11,500 in 2002 and 2004
 City Manager, Marco Island, FL (population 15,000) in 2014
 City Manager, Mascotte, FL (population 5,873) in 2021
 City Manager, Medina, WA (population 3,000) in 2013
 City Manager, Melbourne, FL (population 72,500) in 2012
 City Manager, Miami Gardens, FL (population 101,000) in 2004
 City Manager, Mill Creek, WA (18,828) in 2015 and 2022
 City Manager, Miramar, FL (population 122,000) in 2013
 City Manager, Monroe, NC (population 33,500) in 2013
 City Manager, Montverde, FL (population 1,675) in 2020
 Town Manager, Mooresville, NC (population 41,995) in 2019
 City Manager, Mount Dora, FL (population 12,000) in 2005
 City Manager, Mount Pleasant, MI (population 26,000) in 2014

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, Mountlake Terrace, WA (population 20,700) in 2014 and 2016
 City Manager, Naples, FL (population 21,800) in 2018
 City Manager, New Smyrna Beach, FL (population 23,000) in 2009
 City Manager, Normandy Park, WA (population 6,335) in 2013 and 2015
 City Manager, North Miami, FL (population 62,000) in 2010 and 2014
 Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012
 City Manager, North Port, FL (population 55,800) in 2011
 Town Manager, North Topsail Beach, NC (population 734) in 2018
 City Manager, Norwich, CT (population 40,500) in 2016
 City Manager, Oakland Park, FL (population 42,800) in 2014
 City Manager, Ocala, FL (population 52,000) in 2008 and 2015
 City Manager, Opa-Locka, FL (population 2,180) in 2019
 City Manager, Orange City, FL (population 10,000) in 2010 and 2016
 City Manager, Orange Park, FL (population 9,100) in 2010
 City Manager, Oviedo, FL (population 33,000) in 2008
 City Manager, Palm Bay, FL (current population 101,000) in 2002 and 2015
 City Manager, Palm Coast, FL (population 71,000) in 2006
 Village Manager, Palmetto Bay, FL (population 24,000) in 2003
 City Manager, Panama City Beach, FL (population 12,776) in 2012 and 2019
 City Manager, Parkland, FL (population 30,177) in 2017
 City Manager, Petersburg, VA (population 32,701) in 2017
 Village Manager, Pinecrest, FL (population 19,300) in 2011
 City Manager, Pompano Beach, FL (population 101,000) in 2007
 City Manager, Port Orange, FL (population 67,494) in 2021
 City Manager, Port Richey, FL (2,869) in 2020
 City Manager, Port St. Lucie, FL (population 174,100) in 2016
 City Manager, Portland, ME (population 65,000) in 2011
 City Manager, Prosser, WA (population 5,802) in 2016
 Chief Administrative Officer, Renton, WA (population 100,953) in 2021
 City Manager, Riviera Beach, FL (population 37,000) in 2009
 City Manager, Roanoke, VA (population 98,465) in 2009 and 2017
 City Manager, Sammamish, WA (population 64,548) in 2019
 City Manager, Sanibel Island, FL (population 7,319) in 2021
 City Manager, Sarasota, FL (population 55,000) in 2012
 City Manager, Satellite Beach, FL (population 10,100) in 2013
 City Manager, Savannah, GA (population 142,800) in 2016
 City Manager, Scottsdale, AZ (population 217,400) in 2013
 City Manager, Sebastian, FL (population 24,772) in 2018
 City Manager, Seminole, FL (population 17,800) in 2015
 City Manager, Sequim, WA (population 6,700) in 2015 and 2021
 Town Manager, Sewall's Point, FL (population 2,000) in 2006
 Township Manager, Spring Garden Township, PA (population 12,963) in 2018
 Township Manager, Springettsbury Township, PA (population 26,700) in 2014 and 2016

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, St. Pete Beach, FL (population 10,000) in 2014 and 2019
 City Manager, Stuart, FL (population 17,000) in 2006 and 2017
 City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011
 City Manager, Sunrise, FL (population 84,400) in 2012
 City Manager, Sunnyside, WA (population 15,860) in 2013 and 2018
 Town Manager, Surfside, FL (population 6,000) in 2014
 City Manager, Tacoma, WA (population 200,000) in 2011 and 2017
 City Administrator, Tavares, FL (population 11,000) in 2006
 City Manager, Temple Terrace, FL (population 26,901) in 2022
 City Manager, Titusville, FL (population 43,940) in 2014
 City Manager, Treasure Island, FL (population 6,937) in 2017
 City Manager, Vero Beach, FL (population 16,751) in 2019
 City Manager, West Melbourne, FL (population 15,000) in 2009
 City Manager, West Park, FL (population 12,000) in 2005 and 2010
 City Manager, Weston, FL (population 70,015) in 2019
 City Manager, Winchester, VA (population 28,108) in 2014 and 2020
 City Manager, Winter Haven, FL (population 37,900) in 2017
 City Manager, Yakima, WA (population 91,000) in 2011 and 2012

County Administrator / Manager - Completed Searches

County Manager, Alachua County, FL (population 251,400) in 2014
 County Manager, Baker County, FL (population 27,000) in 2006
 County Administrator, Bay County, FL (population 158,000) in 2005
 County Manager, Brevard County, FL (population 536,000) in 2009
 County Administrator, Broward County, FL (population 1,800,000) in 2006
 County Administrator, Clackamas County, OR (population 383,900) in 2013
 County Manager, Clay County, FL (population 212,230) in 2005, 2011 and 2019
 Chief Administrator, El Paso County, TX (population 827,700) in 2014 and 2016
 County Administrator, Emmet County, MI (population 32,900) in 2014
 County Manager, Flagler County, FL (population 83,000) in 2007
 County Manager, Fulton County, GA, (partial search) in 2015 (population 894,300) in 2015
 County Administrator, Hernando County, FL (population 172,800) in 2012
 County Administrator, Highlands County, FL (population 98,000) in 2008
 County Administrator, James City County, VA (population 69,000) in 2014
 County Manager, Lee County, FL (population 600,000) in 2009
 County Administrator, Martin County, FL (population 140,000) in 2005
 Borough Manager, Matanuska-Susitna Borough, AK (population 85,000) in 2011
 County Administrator, Monroe County, FL (population 80,000) in 2004
 County Administrator, Nassau County, FL (population 60,000) in 2004
 County Administrator, Okaloosa County, FL (population 183,500) in 2013
 County Administrator, Okeechobee County, FL (population 39,000) in 2008

Governmental Search Assignments (continued)

County Administrator / Manager - Completed Searches (continued)

County Manager, Osceola County, FL (population 235,000) in 2003 and 2007
 County Administrator, Polk County, IA (population 400,000) in 2007 and 2011
 County Manager, Seminole County, FL (population 410,000) in 2006
 County Administrator, St. Johns County, FL (population 162,000) in 2007
 County Administrator, St. Lucie County, FL (population 284,000) in 2014
 County Manager, Union County, NC (population 198,600) in 2010
 County Administrator, York County, VA (population 66,269) in 2015

Completed Searches – Other Municipal CEO

Executive Director, Bartow Municipal Airport Development Authority, Bartow, FL in 2017
 Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016
 General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
 General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
 General Manager, Island Water Association, Sanibel, FL in 2018
 Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011 and 2022
 Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
 Executive Director, South Correctional Entity (SCORE), Des Moines, WA (population served 406,000) in 2018

Community Association CEOs and Assistant CEOs

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016
 Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011 (The Executive Director also managed five community associations.)
 Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV (population 14,000) in 2015 and 2017
 Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017
 Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001

Completed Searches – Assistant/Deputy Managers

Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013
 Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014

Governmental Search Assignments (continued)

Completed Searches – Assistant/Deputy Managers (continued)

Deputy City Manager, Danville, VA (43,000) in 2016
 Deputy City Administrator, Dickinson, ND (population 22,300) in 2016
 Deputy City Manager for Community Building, Durham, NC (population 220,000) in 2009
 Assistant Town Manager, Jupiter Island, FL (population 654) in 2010
 Assistant Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1998
 Assistant City Manager, Lake Worth Beach, FL (population 37,000) in 2004
 Assistant County Administrator, Martin County, FL (population 140,000) in 2006
 Deputy City Manager, Sammamish, WA (60,000) in 2016
 Assistant City Manager, Tamarac, FL (population 55,500) in 2001
 Assistant City Manager, West Palm Beach, FL (population 101,000) in 2004 and 2013

Completed Searches – City or County Attorneys

County Attorney, Clay County, FL (population 196,400) in 2016
 City Attorney, Daytona Beach, FL (62,300) in 2016
 City Attorney, Fort Lauderdale, FL (population 178,752) in 2018
 City Attorney, Fort Pierce, FL (population 41,590) in 2016 and 2018
 County Attorney, Fulton County, GA (population 996,319) in 2015
 City Attorney, Lawton, OK (population 94,653) in 2020
 City Attorney firm, Naples, FL (population 22,367) in 2021
 City Attorney, Ocala, FL (population 60,021) in 2022
 Chief Labor Negotiator, Orlando, FL (population 270,934) in 2018
 City Attorney, Port St. Lucie, FL (population 185,132) in 2016 and 2019
 County Attorney, Prince William County, VA (population 438,580) in 2015
 City Attorney, Roanoke, VA (population 96,000) in 2012
 Fire District Attorney, St. Lucie County Fire District, FL (population 298,600) in 2017
 City Attorney, Vero Beach, FL (population 16,751) in 2019
 City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Planning and Community Development Director, Bradenton, FL (population 60,888) in 2021
 Growth Management Director, Collier County, FL (population 357,305) in 2015 and 2017
 Community Development Director, Danville, VA (population 43,000) in 2016
 Planning and Development Director, Fairfax County, VA (population 1,150,309) in 2022
 Director, Building and Development, Loudoun County, VA (population 336,900) in 2014
 Community Development Director, Miami, FL (population 408,000) in 2008
 Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012
 General Manager, North Sarasota Redevelopment District, Sarasota, FL (population 53,000) in 2008
 Growth Management Director, St. Lucie County, FL (population 261,000) in 2005

Governmental Search Assignments (continued)

Completed Searches – Economic Development / Redevelopment

Community Development Director, Tamarac, FL (population 55,500) in 2007
 Growth Management Manager, Wellington, FL (population 55,000) in 2009
 Executive Director, Camden County (GA) Joint Development Authority (pop. 51,400) in 2014
 Economic Development Director, Collier County, FL (population 328,000) in 2012
 Economic Development Director, Concord, NH (population 42,444) in 2017
 Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009
 Economic Development Director, Roanoke, VA (population 96,000) in 2012
 Director, Office of Economic & Workforce Development, Durham, NC (pop. 220,000), 2009
 Economic Development Director, Loudoun County, VA (population 326,000) in 2010
 Economic Development Director, St. Johns County, FL (population 162,000) in 2011

Completed Searches – Engineers

City Engineer, Gulfport, MS (population 90,000) in 2008
 Director/Engineering/Public Works /Utilities, Hallandale Beach, FL (population 39,000) 2013
 Deputy County Engineer, Martin County, FL (population 140,000) in 2006
 Assistant City Engineer, Melbourne, FL (population 75,000) in 2008
 City Engineer, Sunny Isles Beach, FL (population 17,000) in 2006
 Staff Engineer, Wellington, FL (population 55,000) in 2009

Completed Searches – Facilities Management

Director, Performing Arts & Convention Center, Federal Way, WA (population 92,700) in 2015
 Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Finance and Budget

Finance Director, Altus, OK (population 19,800) (background check) in 2012
 Finance Director, College Park, MD (population 32,256) in 2016
 Procurement Director, Collier County, FL (population 357,305) in 2016
 Finance Director, Danville, VA (population 43,000) in 2014
 Finance Director, Daytona Beach, FL (population 31,860) in 2012
 Finance Director, DeLand, FL (population 28,230) in 2016
 Finance Director, Escambia County (FL) Housing Authority (population served: 302,700), 2014
 Chief Financial Officer, Estero, FL (population 36,939) in 2022
 Finance Director, Fort Walton Beach, FL (population 20,000) in 2006
 Finance Director, Gainesville, FL (population 133,857) in 2020
 Finance Director, Groveland, FL (population 12,493) in 2018
 Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012
 Manager, Office of Management & Budget, Lake Worth Beach, FL (population 37,000) in 2010

Governmental Search Assignments (continued)

Completed Searches – Finance and Budget (continued)

Finance Director, Lauderdale Lakes, FL (population 32,000) in 1998
 Finance Director, Miami, FL (population 408,000) in 2013
 Finance Director, Miramar, FL (population 130,300) in 2016
 Treasurer, Miami, FL (population 408,000) in 2013
 Finance Director, Oregon City, OR (population 31,860) in 2012
 Finance Director, Petersburg, VA (population 32,701) in 2017
 Finance Director, Roanoke, VA (population 99,000) in 2014
 Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
 Revenue Operations Director, Savannah, GA (population 142,800) in 2017
 Budget Director, St. Petersburg, FL (population 248,000) in 2009
 Finance Director, St. Petersburg, FL (population 248,000) in 2010
 Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010
 Finance Director, Surfside, FL (population 5,700) in 2012
 Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009
 Finance Director, West Palm Beach, FL (population 101,000) in 2007
 Chief Financial Officer, Winter Springs, FL (population 36,342) in 2022

Completed Searches – Fire/EMS/Dispatch

Fire Chief, Cape Coral, FL (population 154,300) in 2013
 Fire Chief, Lauderdale Lakes, FL (population 32,000) in 1999
 Executive Director, South Sound 911 (serves a population of 808,000), Tacoma, WA, in 2013
 Fire Chief, St. Lucie County Fire District, FL (population 298,600) in 2018
 Fire Chief, West Palm Beach, FL (population 101,000) in 2005

Completed Searches – General Services / Administration

General Services Director, Loudoun County, VA (population 349,700) in 2015

Completed Searches – Housing/Building

Building Official, Jupiter Island, FL (population 580) in 2005 and 2010
 Building Official, Miami Beach, FL (population 91,000) in 2005
 Building Official, Sewall's Point, FL (population 2,000) in 2006
 Building Official, Tamarac, FL (population 55,000) in 2008

Completed Searches – Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006

Governmental Search Assignments (continued)

Completed Searches – Human Resources (continued)

Human Resources Director, Cape Coral, FL (population 154,300) in 2013
 Director, Human Resources, Gainesville, FL (population 125,000) in 2014
 Director of Personnel, Fulton County, GA (population 992,000) in 2010
 Director, Human Resources, Hillsborough County, FL (population 1,292,000) in 2015
 Human Resources Office, Loudoun County, VA (population 326,000) in 2011
 Human Resources Administrator, Martin County, FL (population 140,000) in 2007
 Personnel Director, North Miami, FL (population 56,000) in 2001
 Director, Human Resources, Sunrise, FL (population 88,800) in 2015
 Director, Human Resources, Roanoke, VA (population 99,000) in 2014
 Personnel Director, Vero Beach, FL (population 17,900) in 2003
 Human Resources Director, West Palm Beach, FL (101,900) in 2013 and 2014

Completed Searches – Health and Human Services

Director, Health and Human Services, St. Johns County, FL (population 162,000) in 2010

Completed Searches – Information Technology

Information Services Director, Cooper City, FL (population 33,382) in 2017
 Information Services Director, Lauderdale Lakes, FL (population 32,000) in 1998
 Information Services Director, Palm Beach County Tax Collector (population 1,300,000), Palm
 Beach County, FL in 2012 (partial search)
 Chief Information Officer, Weston, FL (population 65,300) in 2015

Completed Searches – Parks/Recreation/Libraries

Parks and Recreation Director, Cape Coral, FL (population 179,804) in 2018
 Parks and Recreation Director, Deerfield Beach, FL (population 78,041) in 2017 and 2019
 Director, Parks, Recreation, & Conservation, Hillsborough County, FL (pop. 1,292,000) in 2015
 Director, Parks and Recreation, Hobbs, NM (population 35,000) in 2014
 District Manager, Holiday Park Recreation District, Palm Bay, FL (population 1,400) in 2007
 Libraries and Information Services Director, Newport News, VA (population 183,000) in 2017
 Library Services Director, St. Johns County, FL (population 162,000) in 2007
 Parks and Recreation Director, West Palm Beach, FL (population 101,000) in 2006
 Parks and Recreation Director, Weston, FL (population 70,015) in 2019

Completed Searches – Police

Police Chief, Farmington, NM (population 45,900) in 2014

Governmental Search Assignments (continued)

Completed Searches – Police (continued)

Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)
 Police Chief, Indian Creek Village, FL (population 89) in 2022
 Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
 Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
 Chief of Police, Mooresville, NC (population 35,300) in 2016
 Police Chief, Petersburg, VA (population 32,701) in 2017
 Director of Administration – Public Safety, Ocean Reef Community Association, Key Largo, FL
 in 2016
 Police Chief, Sewall's Point, FL (population 2,000) in 2007
 Police Chief, St. Augustine Beach, FL (population 6,200) in 2012
 Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010
 Police Chief, Winchester, VA (population 27,216) in 2017

Completed Searches – Public Works

Public Works Director, Aventura, FL (population 37,200) in 2016
 Public Works Director, Camden County, GA (population 53,044) in 2019
 Solid Waste Director, Camden County, GA (population 53,044) in 2018
 Public Works Director, Chandler, AZ (population 250,000) in 2007
 General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
 Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL
 (population 200,000) in 2003
 Vice President, Public Works & Operations, Ocean Reef Community Association (population
 2,000), Key Largo, FL, in 2001
 Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
 Public Works Administrator, Renton, WA (population 100,953) in 2020
 Public Works Director, Sammamish, WA (60,000) in 2016
 Director/Capital Projects Manager/City Engineer, Sunny Isles Beach, FL (pop. 17,000) in 2007
 Assistant Public Works Director, Sumter County, FL (107,000) in 2015
 Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008
 Public Works Director, Tamarac, FL (population 55,500) in 2003
 Solid Waste Director, Tampa, FL (population 335,700) in 2014
 Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Transportation

Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900)
 in 2016 and 2022

Governmental Search Assignments (continued)

Completed Searches – Utilities

Water Resources Director, Asheville, NC (population 87,200) in 2015
 Executive Director, Cape Fear Utility Authority, Wilmington, NC (population served 230,000) in 2021
 Utility Director, Danville, VA (population 43,000) in 2015
 Power & Light Division Director, Danville, VA (population 43,000) in 2015
 Water and Gas Director, Danville, VA (population 43,000) in 2016
 Utilities Manager, Deerfield Beach, FL (population 78,041) in 2017
 Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013
 Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012 and 2020
 Executive Director, Emerald Coast Utilities Authority, Pensacola, FL (population served 300,000) in 2020
 Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003
 Utilities Director, Lake Worth, FL (population 37,000) in 2009
 Deputy Water & Sewer Director, Miami-Dade County, FL (population 2.706 million) in 2022
 Waterworks Director, Newport News, VA (population 183,000) in 2017
 Executive Director, Onslow Water & Sewer Authority, Jacksonville, NC, (pop. 160,000) in 2009
 Utilities Director, Palm Bay, FL (population 101,000) in 2005
 Utilities Director, Panama City, FL (population 38,286) in 2017
 Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
 Executive Director, Sewerage and Water Board of New Orleans, LA (population 369,000) in 2013
 Customer Service Chief (a C Suite level position), Sewerage and Water Board of New Orleans, LA (population 369,000) in 2020
 Director, South Martin Regional Utilities, FL (population 22,000) in 2013
 Executive Director, Spartanburg Water, SC (population served 327,997) in 2022
 Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
 General Manager, Tampa Bay Water, FL (population served 2,400,000) in 2008, 2021 and 2022

Completed Searches – Work Force Management

Director, Office of Economic & Workforce Development, Durham, NC (pop. on 220,000), 2009

Completed Searches – Other

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016
 City Clerk, Lauderdale Lakes, FL (population 32,000) in 1998
 Clerk to the County Commission, Fulton County, GA (population 1.02 million) in 2018
 Director, Registrations and Elections, Fulton County, GA (population 992,000) in 2009

Governmental Search Assignments (continued)

Environmental Resources Director, St. Lucie County, FL (population 261,000) in 2009

Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV
(population 14,000) in 2015 and 2017

Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998

Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL
in 2017

Appendix B

Sample Brochure: City Manager Search Mascotte, FL



— POSITION AVAILABLE —

CITY MANAGER | Apply by April 16, 2021

Welcome to the City of Mascotte, Florida

Located in central Florida in Lake County, Mascotte has a quiet, rural feel, yet downtown Orlando is only 45 minutes to the east and Disney World theme parks are 45 minutes to the southeast. Most people own their homes, and residents value the city for its peaceful, laidback lifestyle.

Mascotte is a community first and foremost. Residents are friendly and neighbors help neighbors. The City is very diverse, and newcomers are welcome! Residents want the best for their community. Mascotte is safe—violent crime is extremely rare here. The school system is good and housing prices are reasonable—a new 2,000 square foot home with three bedrooms and two baths will sell for somewhere between \$250,000 and \$300,000. Further, it is still a good time to buy. Home values have gone up 8.2% over past year and Zillow predicts they will rise 7.6%



in the next year. For the active, Mascotte has three parks: the Park Road Complex (which houses a variety of sports fields), the Palmetto Drive Park (with a basketball court and a playground), and the Tedder/Thomas Civic Center Playground. While the City has some small stores (including two Mexican specialty food stores, Dollar General and Family Dollar), the nearest chain grocery store is 10 minutes away in Groveland. For other shopping most people travel another 10 minutes further east to Clermont or continue on to Orlando.

One of Mascotte's strengths is numerous amenities lie within an hour's drive. For the nature lover, the Green Swamp is to the southwest. Covering 110,000 acres, it is composed of wetlands, flatlands and low ridges. Lake Louisa State Park is on its eastern edge and 20 minutes from Mascotte. Its sprawling grounds total more than 4,000 acres and include several distinct environments (like palmetto stands, cypress swamps, and old-growth oak forests). In addition to its namesake Lake Louisa, the park includes a number of smaller ponds and lakes. Further, it offers swimming, picnicking, horseback riding, hiking, camping, fishing, and canoeing. Amenities include a canoe/kayak ramp, 16 miles of equestrian trails, and a primitive equestrian campground, as well as a 0.5-mile nature trail, 20 miles of hiking trails, fishing pier, canoe/kayak launch, and a picnic pavilion. Plant and animal life of many varieties is plentiful.

For those who value theme parks, about 50 miles southeast lies Disney World, SeaWorld and Universal Studios. Bush Gardens in Tampa is 65 miles to the southwest. For the professional sports aficionado, Orlando offers the NBA's Magic as well as both major league men's and women's professional soccer teams. Tampa is home to the NFL's Buccaneers, the MLB's Rays, the NHL's Lightning and several other minor league affiliates. For the college fan, the famed University of Florida is just 90 miles up the road with all of its nationally recognized programs while the University of Central Florida and South Florida are even closer.

Cultural opportunities are nearby as well. Among Orlando's many venues are the Philharmonic Orchestra, the Orlando Museum of Art, the Bob Carr Performing Arts Center, and the Dr. Phillips Center for the Performing Arts. In the other direction,

Tampa offers the Tampa Museum of Art and Straz Center for the Performing Arts as well as a host of others.

If you like to travel, it's 40 miles to Orlando International Airport, or for a low-cost carrier, it is 60 miles to Orlando Sanford International Airport. Tampa International Airport is 75 miles to the southwest. When cruising comes back, the world's second busiest port in terms of passenger volume is Port Canaveral—only 85 miles away on Florida's east coast.

All in all, Mascotte is a great small town that is brimming with opportunity and potential for any municipal professional. We invite you to apply!

HISTORY

Mascotte's modern history began in approximately 1885, when J.W. Payne settled here. He named the City after a ship, "The S.S. Mascotte", which made regular trips from Boston to St. Petersburg. It was believed that he owned an interest in the ship. Shortly thereafter, a two-story schoolhouse was built and opened. Mascotte's first physician also arrived in 1885. In its early days, agriculture was the primary source of commerce, and by the early to mid-1920s, the City hosted three fruit and vegetable packing houses.

Mascotte was officially chartered as a city by the State Legislature on November 23, 1925. Over the next 80 years, Mascotte grew very slowly. More recently, in the last 20 or so years, a number of subdivisions have been constructed and the City's estimated population has ballooned to 6,447. More are on the way. The City has developments of another 1,100+ homes in various stages of approval.

DEMOGRAPHICS

Mascotte is a diverse, accepting community where everyone is welcome. Table I (top of page 3) provides some information on the City's demographics.

Table 1: Mascotte Demographics

Distribution by Race		Distribution by Age	
White	76.7%	0 to 15	22.9%
Black	11.8%	15 to 25	15.3%
Asian	0.3%	25 to 45	28.8%
Additional Races	11.2%	45 to 65	24.9%
Total	100%	65 to 85	8.0%
Hispanic Ethnicity (all races)	43.6%	85 +	0.1%
Estimated Population: 6,447			
Educational Achievement (Over Age 25)			
High School or Higher		79.1%	
Bachelor's Degree or Higher		5.9%	
Other Statistics			
Median Age—Mascotte		31.7	
Median Age—U.S.		37.8	
Median Household Income—Mascotte		\$43,544	
Median Household Income—U.S.		\$61,937	
Poverty Rate		23.8%	

Source: U.S. Census Bureau and the Florida Office of Economic and Demographic Research

CLIMATE

Mascotte enjoys a humid subtropical climate with two main seasons: the hot and rainy season (from May to September), and the mild and dry season (from October to April). The high temperatures are typically in the 90s during the summer and rarely fall below the mid-70s. The afternoons often bring short bursts of rain and thunder. During the winter months, the average temperatures are in the 60s, with lows in the 40's. The average annual rainfall is 50 inches and snow is exceptionally rare here.

Hurricanes strike Florida from time to time, though they are relatively uncommon and their impact is limited, particularly this

far from the coast. Further, if you are more than 50 miles from the hurricane's center, it will probably not materially impact you.

GEOGRAPHY

Located in Central Florida (see Figure 1 on page 5), Mascotte covers just over 18 square miles, of which 12.4 square miles are land. Lakes dot the region, both inside and outside Mascotte and the terrain is characterized by gently rolling hills. Much of the land is pastoral and quite scenic. The city is an average of 135 feet above sea level.

The City itself can be divided into two sections (see Figure 2 on page 5). The northern section is largely rural and undeveloped. The southern section is primarily developed. The City presently has approximately 2,200 homes.

Mascotte is a 45-minute drive west of Orlando, 3 hours south of Jacksonville, 1.5 hours north of Tampa, and 4 hours north of Miami.

COMMERCE

While Mascotte is almost exclusively residential, U.S. Route 50 splits the southern section of the City, and along it lie a number of small businesses. These include some very good, relatively inexpensive restaurants. The community's comparatively large Hispanic population is reflected in its two Mexican grocery stores and restaurants. U.S. 50 also serves as a major route for commuters as it bisects the state running from Spring Hill (about 45 miles north of Tampa) on Florida's west coast through Orlando and ending at Titusville on the east coast. Mascotte's residents generally commute to work outside the city—particularly, Orlando—and do most of their shopping in nearby Clermont. Table II (see page 6) displays the principal employers in Lake County. The County's significant retirement population is reflected in the presence of healthcare employers in the table.



GOVERNMENT

Mascotte's City Council is composed of five members, all of whom serve staggered two-year terms without term limits. They are elected at large and can live anywhere in the City. The longest tenured Council Member has served for 15 years while the second and third most senior have served eight and six years respectively. The other two are relatively new, the Mayor serving year and a half, and a Council Member who was elected last November. The Council gets along reasonably well although it is not uncommon for them to be split three to two on issues. The past few years have been difficult as the City transferred its Fire Department to the County, and it was controversial. The good news is the City's elected officials all want what is best for the Mascotte.

Primary services offered by the City include community and economic development, finance, human resources, police, public works, and public works/services (sanitation, stormwater, water, wastewater and fleet, grounds and facilities maintenance). The City owns three parks, and they are all maintained by the Public Works Department. Mascotte does not offer recreational programming.

The City's FY 2020-2021 total budget is \$8,199,100 and is composed of three primary components: the general fund budget of \$4,398,800, the water and sewer budget of \$2,343,700, and a special revenue funds budget of \$1,556,600. The current millage rate is 7.1323 .2000 (down from 9.6147 in 2010-2014). The City has 25 employees, and none are unionized.

THE CHALLENGES AND OPPORTUNITIES

Mascotte is a wonderful city that is financially well positioned. Over the past ten years, it has spent its money wisely and carries no debt. The staff is generally strong, and the City's challenges are not insurmountable. All it needs is a strong City Manager to help lead it to a brighter future!

The first and foremost challenge/opportunity is growth. Mascotte's location is attractive, and now that many sites closer to Orlando have been developed, interest is stirring again. The challenge is to be prepared for the growth when it re-emerges and then balance it in a way that maintains Mascotte's small town feel. The City's Comprehensive Plan and Land Development Regulations need to be updated. Annexation needs to be considered as vacant land exists around the City and without it being in Mascotte, the County or a nearby city may approve something Mascotte's residents do not find desirable.

A related challenge is balance. Some of the more established residents would like to keep things that way. Others recognize the benefits of growth—more roof tops mean more businesses and businesses bring tax dollars to pay for the amenities residents want but the City does not currently offer. With about 2,200 homes in the City at the moment, and another at least 1,100 in the planning process, things will change. The question is just how, when and what form the developments will take. Again, the City needs to be ready.

Mascotte needs to develop a vision for what it wants to be in 10 to 20 years. Presently, the City is known more as a place you drive through than a place to live. It does not offer many special events and, as noted, it does not have a recreation function. The parks need to be updated with new playground equipment. As motorists pass through Mascotte on U.S. Route 50, they often leave trash on the roadside. Some of the buildings along 50 are dilapidated. Simply put, the City needs a facelift. Events and activities need to be offered to draw people to the community and make it a place to go to rather than drive through.

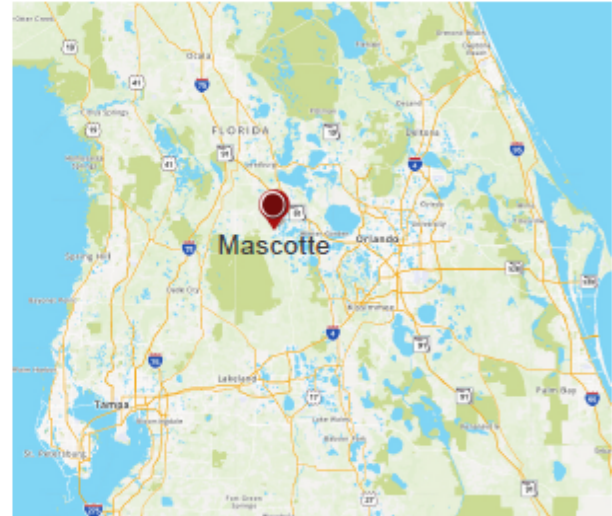


Figure 1: Location of the City of Mascotte, FL

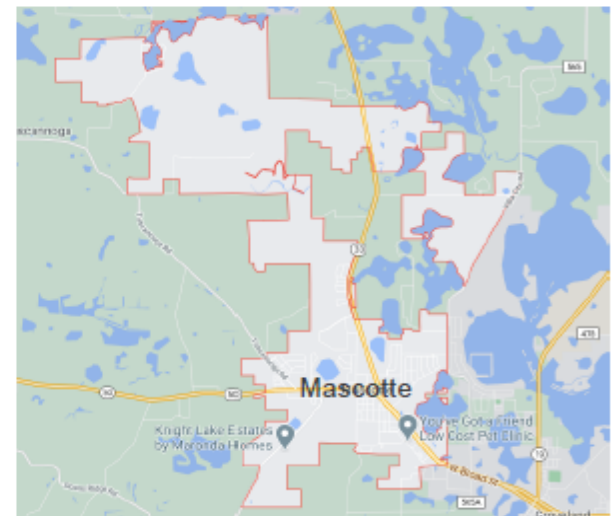


Figure 2: Mascotte City Limits

The Council would like a review of internal processes to determine what can be made more efficient and/or effective. The questions that need to be answered are: Are we doing the right things? Are we doing them in the best way? Are the right people in the right jobs? Additionally, over the years, a number of services (sanitation, mowing, and fire) have been contracted out or transferred to the County. Does it make sense to bring any of them back in-house?

Table 2: Principal Employers, Lake County, FL

Employer	Industry	Employees
Lake County Public Schools	Education	5,838
Lake County Government	Government	2,059
Florida Hospital Waterman	Healthcare	1,759
Central Florida Health	Healthcare	1,700
Orlando Health South Lake Hospital	Healthcare	1,500
Leesburg Regional Medical Center	Healthcare	1,484
Golf Management Solution	Recreational	900
Elite Line Services LLC	Industrial Services	785
Club Exploria LLC	Travel	780
Raney Construction	Construction	507

Source: Lake County, FL 2019 CAFR

Finally, some in the community have lost trust in the City government. Social media has not helped. It seems that some would rather pontificate about rumors they have heard than to come a City Council meeting to find out what is really happening and why. The next City Manager will need to be out front telling the City's story in a positive way.

Mascotte has many opportunities to improve and become the gem it can be. It just needs the help of a great City Manager.

THE IDEAL CANDIDATE

Mascotte is seeking an exceptional manager and leader who has a passion for his/her community and is eager to take help take it to the next level. While he/she works for the Council, the individual will be more of a partner and a trusted advisor. The Manager will understand politics but not be involved in them. He/she have unimpeachable integrity, believe strongly in transparency, and be technically competent.

The individual will be achievement oriented and a strategic thinker—someone who is always a step ahead and working diligently to identify and capitalize on Mascotte's strengths. The

Manager will work with the city's elected leadership to create a vision of what they want the City to be in the future. They will then work together to implement that vision.

Having pride in doing the job well will be critical to the next manager's success. He/she will lead by example and make a point of delivering top notch city services. The individual will want Mascotte to be viewed as an attractive community and work with the staff to improve the community's image and appearance. Excellent customer service will be very important to the Manager. He/she will know how to work with people and resolve problems in a timely manner. The

resident is not always right but does deserve to have his/her concerns heard and for the City to make an effort to resolve them.

The next City Manager will be approachable, honest, fair, and open—listening carefully and responding in a positive, cordial and helpful way. The individual will be a consensus and team builder with excellent communications skills. He/she will be comfortable talking to individuals from all walks of life. More importantly, he/she will make them feel valued. Mascotte is a small town, and the Manager is one of the faces of its government.

The Manager will be eager to rebuild the public trust and realize the media, particularly social media, can play a critical role. The individual will know how to get the City's story out. Recognizing the harm naysayers can do, particularly on social media, he/she will be quick to politely correct the record.

The next Manager will be analytical and have a healthy sense of impatience. The individual will review current policies, procedures and practices. While he/she will not make change for the sake of change, the Manager will always be looking for

better ways to accomplish the City's business. He/she will be a knowledge of the application of information technology to optimizing work and processes.

Within the organization, the City Manager will delegate and encourage an environment that inspires creativity. The individual will recognize talent, mentor and coach that talent and be confident enough to step back and let staff members do their jobs. The ideal candidate will give assignments, set broad performance parameters, and expect results. That said, the manager will expect to be kept informed and will hold employees accountable. The Manager will recognize the staff is small and pitch in, as necessary. At times, a tough decision must be made quickly and when those circumstances occur, he/she will not hesitate.

Personally, the next City Manager will be upbeat, friendly, outgoing, intelligent, organized, and positive—someone with a "can do" attitude and one who is visionary yet practical. At the same time, the individual will be very humble and recognize that giving others the credit is often the best way to get things done. He/she will also be consistent, cheerfully persistent, high energy, and definitely not a bureaucrat. The Manager will be business-oriented but with compassion.

The individual will be adept at intergovernmental relations, working with other agencies in the region as well as with state and local officials to solve problems. Mascotte is not a wealthy city and the ability to find grants and other sources of external funding will be very helpful. He/she will also have strong negotiation skills and represent the City's interests well.

The ideal candidate will have at least a bachelor's degree in business or public administration, or another area related to city management. The best candidates will have at least five years of experience as a city manager or assistant city manager and expertise in local government, finance and budget, economic development, and redevelopment. Experience in a rural community (Mascotte is not Orlando), emergency management, being able to speak Spanish, and having knowledge of utility operations are pluses.

Finally, the next manager will realize that Mascotte is a place of great potential—one that has open land and a willingness to work with others to develop that land in a rational way—in a way that does not destroy the positive attributes that make the City unique.

COMPENSATION

The salary range is \$ 90,000 to \$ 120,000 and will depend on qualifications and experience. Benefits are excellent.

THE MOST RECENT CITY MANAGER

During his nine-year tenure, the most recent City Manager did a wonderful job of resurrecting the City financially and putting the City on a sound financial footing. Towards the end of his tenure, however, he became controversial and was asked to leave.

RESIDENCY

Residing within the city limits is not required but is something the City's residents and elected officials would prefer the manager do.

HOW TO APPLY

E-mail your resume and cover letter to Recruit37@cb-asso.com by April 16th. Faxed and mailed resumes will not be considered. Questions should be directed to Colin Baenziger at (561) 707-3537 or Lynelle Klein at (425) 658-4025.

INTERNAL CANDIDATES

We do not anticipate any internal candidates.

CONFIDENTIALITY

Under Florida's public records act, once an application is submitted, it is deemed a public record. As a practical matter, we do not expect any media coverage until at least the time the semi-finalists are named, and perhaps not then.

THE PROCESS

Applications will be screened between April 17th and May 24th. Finalists will be selected on May 25th. A reception and interviews will be held on June 3rd and 4th. A selection will be made shortly thereafter.

OTHER IMPORTANT INFORMATION

The City of Mascotte is an Equal Opportunity Employer and encourages women, minorities, and veterans to apply. A veteran's preference will be awarded per Florida law.

ADDITIONAL INFORMATION

For additional information about the city, visit:

www.cityofmascotte.com

www.southlakechamber-fl.com



Appendix C

Sample Candidate Report

Sample Candidate Report

[Note: The following materials are provided with the permission of the candidate.]

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Cover Letter and Resume

March 26, 2020

Mr. Colin Baenziger
Colin Baenziger & Associates
2055 South Atlantic Avenue, Suite 504
Daytona Beach Shores, Florida 32118

Dear Mr. Baenziger:

Please accept the enclosed résumé for the position of City Manager for the City of Cape Coral, Florida. I am confident that my organizational and leadership abilities, educational background, and diverse professional experience are well-suited to the specific requirements of the position.

As indicated in the enclosed résumé, my professional background includes more than 25 years of progressive and responsible local government management experience. As an ICMA Credentialed Manager, I presently serve as the deputy city manager for the City of Fort Lauderdale, Florida. Prior to Fort Lauderdale, I served as the city manager for the City of Savannah, Georgia. In that capacity, I reported to a nine-member city council, created a new strategic plan - [SAVANNAH FORWARD](#), led a family of 2,513 exceptional employees, and implemented a lean operating budget of \$408 million and a capital improvement plan in excess of \$407 million.

My previous experience includes serving as deputy county administrator for Broward County Florida; deputy county manager for Fulton County, Georgia; and assistant to the county administrator, Broward County, Florida. Collectively, my service in these progressive communities has provided me with extensive knowledge and expertise in all aspects of local government operations including affordable housing, strategic planning, transportation, budget development, community services, economic development and community revitalization, human services, and public safety, among others.

I am confident that I bring the right skills, experience and talents to the position. If you would like to schedule an interview or discuss my interest in the position, please contact me at (954) 940-1065 or at robhernandez@comcast.net. Thank you for your consideration.

Sincerely,

Roberto Hernandez

Roberto Hernandez

Enclosure:
- Résumé

ROB HERNANDEZ

1873 Northwest 113th Way, Coral Springs, Florida 33071 | 954-940-1065 | robhernandez@comcast.net

Profile

Proven, resourceful, and results-focused public administrator with more than 25 years of progressive local government management experience. ICMA-Credentialed Manager known for leadership, professionalism and organizational abilities.

Relevant Experience

Deputy City Manager City of Fort Lauderdale, Florida	2019 - Present
City Manager City of Savannah, Georgia	2016 - 2019
Deputy County Administrator Broward County Board of County Commissioners; Fort Lauderdale, Florida	2013 - 2016
Deputy City Manager City of Coral Springs, Florida	2011 - 2013
Deputy County Manager Fulton County Board of County Commissioners; Atlanta, Georgia	2008 - 2011
Assistant to the County Administrator Broward County Board of Commissioners; Fort Lauderdale, Florida	2003 - 2008
Various Positions Broward County Board of Commissioners; Fort Lauderdale, Florida	1994 - 2003

Education

Master of Public Administration
Nova Southeastern University; Fort Lauderdale, Florida

Bachelor of Public Administration
Florida International University; Miami, Florida

Current Professional Affiliations

International City / County Management Association (ICMA) – Credentialed Manager

Florida City / County Management Association

Broward City / County Management Association

Candidate Introduction

Rob Hernandez

EDUCATION

- Master of Public Administration, Nova Southeastern University
- Bachelor of Public Administration, Florida International University

EXPERIENCE

- | | |
|--|----------------|
| • Deputy City Manager; City of Fort Lauderdale, FL | 2019 – Present |
| • City Manager; City of Savannah, GA | 2016 – 2019 |
| • Deputy County Administrator; Broward County, FL | 2013 – 2016 |
| • Deputy City Manager; Coral Springs, FL | 2011 – 2013 |
| • Deputy County Manager; Fulton County, GA | 2008 – 2011 |

BACKGROUND

Fort Lauderdale is the largest municipality in Broward County and the ninth most populated city in Florida, slightly ahead of Cape Coral. Smaller in geographic area than Cape Coral, the city encompasses 38 square miles with a population of 186,220. A popular tourism destination, the city is often referred to as the “Venice of America” because of its many inland waterways, not too dissimilar to Cape Coral’s “Water Wonderland” designation.

The City of Fort Lauderdale is a full-service municipal corporation that provides police protection, fire-rescue services, parks and recreation programs, potable drinking water to a service area both within and outside the City limits along with wastewater collection and treatment, sanitation services, development regulation, parking, and street maintenance. The City also operates a general aviation airport, a downtown heliport, an aquatic complex, and an auditorium. Its current general fund budget is more than \$373.7 million or \$832.7 million in total.

As the deputy city manager, I assist the city manager in overseeing municipal operations, specifically coordinating the activities of the Transportation and Mobility, Public Works, Sustainable Development and Parks and Recreation departments. Collectively these departments have a combined operating budget of \$380 million and 1,527 full-time employees.

The three most critical issues facing the city are:

- Infrastructure
- Resiliency
- Affordable Housing

Both Fort Lauderdale and Cape Coral have identified infrastructure as key elements of their adopted strategic plans. Fort Lauderdale’s emphasis is by necessity due to a series of recent high-profile infrastructure failures and a state mandated consent order. Fort Lauderdale’s initial development boom occurred between the 1950s and 1970s during which the majority of the city’s

Rob Hernandez

infrastructure was installed. Materials of that era include cast iron pipe which is now failing regularly as a result of corrosion and erosion. From the 1990s until today, the city experienced a vertical development boom witnessed by large-scale redevelopment on its barrier island and downtown. This explosive growth was not matched by investments in infrastructure capacity, redundancy, and resiliency. Missteps occurred along the way, including transferring more than \$20 million annually from the Water and Sewer Fund to the General Fund as a “return on investment”, reduction in preventative maintenance activities, and failure to modernize its primary water treatment plant. The consequences of these decisions would surface years later as sewer main breaks, water line breaks, and flooding would disrupt life throughout the city. The City has identified more than \$1.2 billion in needed infrastructure improvements over the next 25 years. In addition to rectifying years of disinvestment in its water utilities, the City’s park system and public safety facilities have suffered a similar fate. The City is now implementing a \$200 million parks bond and \$100 million replacement police headquarters bond referendum to improve those facilities.

Sea level rise is Fort Lauderdale’s second biggest issue. Fort Lauderdale has made adaptation to climate change and rising sea levels a top priority. Many neighborhoods in Fort Lauderdale now experience chronic flooding on a regular basis. According to recent projections issued by the Southeast Regional Climate Change Compact, 10-17 inches of sea level rise by 2040 and 21-64 inches are possible by 2070. The City now requires the impact of sea level rise to be incorporated in future infrastructure master plans. Also, City-owned seawalls are being replaced and elevated, tidal valves have been installed in flood-prone areas, and the City is exploring the feasibility of raising road elevations in certain neighborhoods that are threatened by sea level rise.

Fort Lauderdale’s housing costs are now among the highest in the nation. More than 60 percent of households in the city spend more than 30 percent of their income on housing. The price of single-family homes has increased 41 percent since 2013. In 2018, the median sale price for a three-bedroom home was \$440,000. A four-bedroom home is now \$835,000. Given the high cost of homeownership, many are forced to rent; however, rental costs are equally unaffordable with the average two-bedroom rental costing \$2,705 monthly. Three bedrooms, \$3,204. The City is attempting to incentivize various housing types to support all income groups by providing zoning incentives such as height and density bonuses, no- or low-interest loans, or grants to developers to facilitate the construction of more affordable units. Without an affordable and diverse housing stock, the city, county, and region will not succeed in creating a diversified and balanced economy.

GENERAL MANAGEMENT STYLE AND EXPERIENCE

Cape Coral is a jewel for public administration professionals to practice their craft in a progressive environment. The challenges in Cape Coral are similar to those I have faced throughout my career as a city manager or deputy manager. For those reasons, I believe that the combination of my experience as a proven leader understanding local government in Florida, the ability to work with elected and appointed officials and the ability to understand and solve problems will allow me to excel as Cape Coral’s next city manager.

Rob Hernandez

Many can manage but few can lead. Management is something I did earlier in my career; at this point in my professional career and personal life, I believe it is more important to exercise leadership. As leaders, we must communicate a clear vision and direction. We must demonstrate a passion for what we do – that is, to make a difference every day. For me, leadership is situational. When time, resources, and skills permit, my leadership style is participatory and collaborative. In other circumstances, it must be directive.

Great leadership is infectious. People are your greatest assets. It is important to create an environment where people want to work hard by making things fun, challenging, and rewarding. I believe in building a positive work climate where people are appreciated and valued. I like to consider myself a “macromanager” rather than a micromanager. I view my role as explaining the project or task, the expected result and deadline, and monitoring performance on a regular basis. I track projects and assignments using a Sharepoint site and meet with staff on a routine basis to review progress. I meet with staff more frequently on an as-needed basis. I describe what needs to be done, provide them the resources, get out of their way, and hold them accountable. So far, I think this approach has worked.

I am confident that staff and elected officials would describe me as professional, thorough, hard-working, ethical, honest, opinionated, and transparent. They would hopefully view me as engaged, participative and inclusive and valuing open communication and feedback, while also allowing for empowerment and accountability.

Two strengths that others will point to are my transparency and ability to make strategic decisions. In terms of a weakness, I believe that my commitment to my organization and loyalty to my teammates has led others to conclude that I can be defensive at times.

Regarding performance measurement, I believe it starts at the top with the governing body establishing a clear strategic vision for the organization, and cascades downward. Once key strategic objectives are defined by the governing board, it is the manager’s job to develop strategies to meet those strategic objectives. Business units then must identify those operational efforts and measures that are aligned with the strategies and long-term objectives. Those help form the basis for developing individual performance measures that are included in performance reviews.

In terms of a significant professional achievement, the revitalization of the Fulton Industrial District (FID) in metro-Atlanta, one the largest industrial, warehousing and logistics centers in the southeastern United States, is one that I am most proud of. In the fall of 2008, I toured FID as Fulton County’s new deputy county manager. What was once a leading center of economic activity was now rife with rampant prostitution, open drug sales, shuttered buildings, neglect, and decay. FID was well into a state of decline that began in the 1980s as its warehouses were abandoned for taller and larger ones elsewhere and manufacturing disappeared overseas. I observed conditions that I had never seen in my career until that day. Families called extended stay motels home. A police detective explained how FID was the child prostitution hub for the entire metropolitan Atlanta region. After a woman was found locked in a dog crate in one of FID’s many hotels, I was horrified and said: “not anymore – not on my watch.”

Rob Hernandez

For the next three years, we made it our mission to make FID better. We used every conceivable resource within county government and put together a team of county agencies that included everything from arts to zoning. We rolled up our sleeves and went to work. We attacked the issues from every angle: from health to human services to public safety. With the help of a dedicated team, we accomplished a remarkable turnaround that included:

- Adoption of the Fulton Industrial Redevelopment Framework
- Designation by the State as an “Opportunity Zone”, providing needed economic incentives
- Establishment of the Fulton Industrial Community Improvement District, a self-taxing entity to take on area wide governance and improvements
- Establishment of the South Fulton Service Center which relocated two county commissioners, police, fire, and all other unincorporated area services to FID

Today, FID is healthy and vibrant. It is now a place where businesses invest rather than flee.

My biggest disappointment thus far involves the establishment of a fire assessment fee in Savannah. A \$14 million budget deficit welcomed me upon arriving in Savannah in October 2016. As I tackled the deficit with my new team members, I realized the City had a structural imbalance that needed a long-term solution. Although revenue growth was respectable, it lagged projected expenditures well into the future. Working with the city council, we agreed to a stopgap approach for Fiscal Year 2017 with the understanding that we would bring back long-term options the following year. Fiscal Year 2018 presented a \$12 million imbalance and to address it, I proposed a fire service assessment using an approach and the same consulting firm as Cape Coral. After spending considerable time and effort creating such a fee, the city council adopted the budget with this fee. The fee provided financial stability, allowed us to lower the millage rate, and provided resources to address capital needs and service priorities. The fee was controversial and faced stiff public resistance. Continued opposition to the fee caused the city council to reverse its decision midway through the fiscal year, requiring us to identify more than \$16 million in new revenue and expenditure reductions. Rescinding a budget halfway through the fiscal year was disruptive to operations. In retrospect, I did not anticipate such stiff opposition since we held more than 60 community meetings and thought we had obtained community buy-in to the extent we could. Newspaper editorials supported our approach. In the end, the fire assessment was reversed, the equivalent of two engine companies eliminated from the fire department’s budget, and the millage rate increased. The painful lesson I learned throughout all of this is that local government must do a better job educating the public on how well it is performing and safeguarding the public’s resources. It was a painful lesson – it still hurts to sit to this day.

Employee terminations are always an unfortunate aspect of what we do as leaders. Unfortunately, I have had to dismiss employees throughout my career for poor performance or poor leadership. While it is never an encounter that brings pleasure or satisfaction, these separations were not a surprise to the affected individual. In every instance the individual was counseled and made aware of performance deficiencies beforehand, corrective actions identified, and the consequences of not meeting the performance standards explained. I hope that in every instance, I treated the employee with respect and dignity. I allowed them to “write their final chapter” with the organization and

Rob Hernandez

allowed them to leave at the top of their game with a celebration of their accomplishments to the organization.

The issues and challenges facing Cape Coral's next city manager are:

- Leading in the Post COVID-19 Era.
- Ensuring continued Smart Growth.
- Continuing to expand and upgrade critical infrastructure.

Sadly, Cape Coral's next city manager will have to lead the organization through the aftermath of Covid-19's devastation. Although the City has a diversified revenue base not overly dependent on one specific funding source, it can expect revenues of all types to be impacted. While the financial realities of the pandemic will become clearer in the months to come, Cape Coral's next city manager will need to assess the financial impacts and determine how to continue basic municipal services, allow for certain aspects of the local economy to resume and balance the workforce and service demands with the new fiscal realities.

Second, Cape Coral's next city manager will need to continue to position the city for growth once the post-COVID 19 recovery begins to take shape. The City will need to continue progressive land use policies and zoning incentives to attract orderly and smart development to greenfields and redevelopment. Promoting growth in the tax base and employment for the city's residents must be a top priority. Fortunately, Cape Coral is well-positioned to attract further economic investment once the nation and the state adjust to the realities of the post-pandemic world.

Finally, investments in infrastructure must continue to drive the next city manager's agenda. During difficult times, many municipalities defer or eliminate investments in critical infrastructure improvements. This is a grave mistake and the next city manager must avoid the urge to gut capital investment plans. Since capital investments are long-term in nature, it is important that Cape Coral's next city manager appreciates the need to ensure adequate investments are made in all facets of municipal infrastructure including roadways, water utilities, facilities, and information systems. For Cape Coral, this includes expanding infrastructure utilities to areas currently not served plus parks and open space to accommodate neighborhood growth. The benefits of such continued investment will pay off in the longer-term. It is important to take a long-term view rather than an immediate one, however painful it may be.

If selected for the position, during my first six months I will:

- Listen, listen, and listen to understand issues, challenges, and desires of all stakeholders: elected officials, neighborhood groups, organized labor, business community, education representatives, the local media, and others;
- Forge a close relationship with the City Council and Mayor;
- Review goals and objectives for the organization with the Mayor and City Council;
- Reach out to department directors and learn about their challenges, priorities, and programs;

Rob Hernandez

- Meet as many employees as possible by conducting several “town hall” sessions;
- Establish trust and credibility with all stakeholders; and.
- Become familiar with the community and its culture.

As for media relations, I appreciate the work the media does. The media can be a great asset if managed properly and cultivated. Being open and honest with them is important. Integrity is an essential part of the relationship with the media. In Savannah, I practiced an open-door policy with the media and reserved a better part of Tuesdays to meet with them. I am not aware of anything in my background that could be considered embarrassing to a potential client.

Social media is an effective tool in keeping the public informed and is changing how government communicates with its various constituencies. I have used social media, primarily twitter, to keep interested individuals informed with short briefs on an issue. This helped us shape our story and put us in leading the community conversation rather than delegating that role to media. I have used social media to help sustain interest on an issue and to keep the public informed on upcoming discussions or significant events. During workshops or regular meetings of my elected body, we would “tweet” aspects of the discussion. In Fort Lauderdale, we rely on ZenCity to help us mine social media on a regular basis to help us gauge public sentiment on a variety of issues.

There is “no dirt” on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night. I also treat people with professionalism and respect. I am honestly not aware of anything in my professional or personal lives that could be viewed negatively. However, while serving as the city manager of Savannah, there were a few individuals who were not supportive of my efforts or views. You may find some blogs critical of my opinion on building materials in the city’s landmark historic district, my hesitance in assuming the operating costs of a regional expressway, and of the ill-fated fire assessment. Regardless, I always conducted myself professionally and never brought any negative attention to the elected officials or the organization I worked for.

My personal interests include the outdoors and pursuing home improvement projects.

ADJECTIVES OR PHRASES THAT DESCRIBE ME:

Driven, Professional, Focused, Disciplined, Organized, Thorough

REASONS FOR CONSIDERING LEAVING CURRENT POSITION:

I am considering opportunities beyond Fort Lauderdale because I believe that I can have a greater impact on an organization and a community by serving in the top leadership role.

CURRENT SALARY

+/- \$217,000 plus \$4,680 auto allowance and \$1,310 cell phone allowance.

CB&A Background Checks

Background Check Summary for ROBERTO HERNANDEZ

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
State	
Florida	No Records Found
Georgia	No Records Found

Civil Records Checks:

County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
Federal	
Florida	No Records Found
Georgia	No Records Found

Motor Vehicle

Florida	No Records Found
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Credit Very Good

Bankruptcy No Records Found

Education Confirmed

Employment Confirmed

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern.

Background Check Summary for ROBERTO HERNANDEZ Personal Disclosure

Personal Disclosure Questionnaire


Name of Applicant: ROB HERNANDEZ

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Do you have a personal My Space, Face Book or other type of Web Page?
Yes ☐ No ☒
9. Do you have a personal Twitter Account?
Yes ☐ No ☒
10. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
11. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
NONE

Attested to: _____


Signature of Applicant

Please email this form via PDF DOCUMENT to Lynelle@cb-asso.com or via fax to
(888) 539-6531 no later than 5:00 PM PST 04/13/2020.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Property of Colin Baenziger & Associates

CB&A Reference Notes

Reference Notes

Roberto “Rob” Hernandez

Elizabeth Taschereau – Director of Developmental Services, City of Margate, FL
954-884-3686 954-218-9798

Ms. Taschereau has known Mr. Hernandez since 2011 when he was hired as the Deputy City Manager for Coral Springs. She was the Community Redevelopment Agency Coordinator and reported to him. She later followed him from Coral Springs to the Savannah when he became the City Manager. She had enjoyed working for him and had wanted to continue learning from him so much that she willingly commuted between her home in Florida to her job in Georgia. After he left Savannah to go to Fort Lauderdale, she also left.

Mr. Hernandez was a successful and professional leader. He had strong project and time management skills. Ms. Taschereau especially admired how well he kept track of numerous project deadlines on his calendar, which she had access to when working under him. He worked well with team and delegated excellently. The only possible weakness he had was his high expectations. He strove to accomplish much, and he expected his staff to perform similarly. Such expectations may have been overwhelming for some who were unsure of their abilities to accomplish their tasks. However, staff members were able to look back and be amazed by how much and how well they accomplished those tasks. Though his high expectations were a challenge for some, many Cities turned around for the better because of his drive.

Mr. Hernandez worked on numerous high profile projects, such as building a new city hall. The old city hall was built in 1905. It was very much out of date and far too small for a city of Savannah’s size. That said, building a new city hall spurred a great deal of controversy over architecture and location. Recognizing it as a critical need, Mr. Hernandez took charge of the project and eventually achieved community acceptance of the building’s location downtown and of the architecture. It all came about in approximately a year and a half and the new city hall celebrated its grand opening in 2018. Another significant project he worked on as upgrading the City’s arena while working with a management company. He was able to renovate the facility while negotiating a contract that was eventually approved by the County Commissioner. It was a huge accomplishment.

Mr. Hernandez was very inclusive of employees in projects, meetings, emails, status reports, memos, and other forms of communication. He communicated in a way they easily understood, and he expected his staff to communicate with him. Such an inclusive mindset was different for staff from the Cities of Coral Springs and Savannah, where the culture was less inclusive. He managed several internal and external projects that involved multiple people across different divisions. Many commented how they had not enjoyed such high communication levels before Mr. Hernandez came. Previously, little communication occurred between divisions. As such, decisions were delayed and less efficient. When he effectively included different groups to integrate on multi-division projects. He helped projects move forward.

Mr. Hernandez also generally made good decisions. He had high integrity. He made the best recommendations and decisions possible for the community as a whole. He did consider the input of groups with special interests, but he strove to make the best possible decision. He also made good decisions with staff members. For example, he reorganized the Savannah City staff, which

Reference Notes

Roberto “Rob” Hernandez

composed of approximately 2,400 employees. This momentous change created openings, which he filled with sharp and high performing individuals. The new employees immediately began planning and establishing standard procedures. The City began to change, and consequently, so did the community. Furthermore, Mr. Hernandez greatly believed in committees. He formed several committees with the Human Resource Department and with staff, sometimes even bringing in external panel members if necessary. He wanted people in high-level positions to make decisions together.

As a great public speaker, Mr. Hernandez worked well with the public. He always remained composed and professional. He had excellent presentation skills. People were generally perceptive to his ideas when he spoke, and he communicated well when invited to speak for different organizations. Even if some people at those meetings were exceedingly unprofessional toward him, he managed himself well. He performed well despite those difficulties. In addition, Mr. Hernandez worked well with individuals. He educated others, providing recommendations on what the Mayor and others needed to vote on. Because of these interpersonal abilities, Mayor and Councilmembers voted on multiple successful projects. Moreover, Mr. Hernandez had good financial skills. He used a hands-on approach with the city budget and worked closely with chief financial officers and the Budget Director. He wanted to ensure he understood the budget accurately.

Though a change agent, Mr. Hernandez did not seek change for the sake of change. He carefully evaluated a City’s situation, whether involving technology, processes, or even City culture. He observed how others managed tasks before he made necessary changes to keep the City moving forward. Ms. Taschereau has done her best to incorporate this valuable lesson into her own leadership skills. Also, Mr. Hernandez an effective problem solver. He solved numerous issues that had existed for long periods of time. Some problems required many changes and more money, which made certain solutions difficult to implement. He attempted to solve these, and then he put plans into place to initiate these necessary changes once enough resources were available. Other problems were out of his realm of influence. As such, Mr. Hernandez made good recommendations, even if people did not follow his advice.

Ms. Taschereau is unaware of anything in Mr. Hernandez’ personal or professional background that will concern a future employer. She would definitely hire him if possible. As someone who has worked for him, she knows how good he is at overcoming challenges and managing a city. Mr. Hernandez is passionate about municipal work. He wants his employers to be high-performing organizations. He has been and will continue to be a very good Manager.

Words or phrases used to describe Roberto Hernandez:

- Successful,
- Professional,
- Collaborative,
- Inclusive,
- High integrity,
- Good speaker, and
- Influential.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Project management, leadership and staff management, presentation abilities, financial understanding.

Weaknesses: His high expectations can be daunting at time, but his expectations drive people to accomplish goals they previously thought they were incapable of achieving.

**Skye Patrick – former Director of Libraries, Broward County, FL 562-940-8400
562-659-1155**

Ms. Patrick has known Mr. Hernandez since 2014. She really enjoyed working with him and learned much from him.

Public Administration was Mr. Hernandez’s strong suit. He was thoughtful and he understood County policy and procedures very well, which meant he navigated in a way that was very helpful to his department. He did not know much about the library system when he was hired, but he studied and learned about how they operate and developed a good understanding.

The Directors hired by Mr. Hernandez were very good selections. He sat on the panel that hired the Finance and Business Administrator, and helped with the searches for the Aviation Director and Human Services. When making decisions in general he was very thoughtful and took the time to gather information.

In general, Mr. Hernandez maintained the organization at a high level and had learned from his department heads to be innovative and creative. They had a monthly meeting where Mr. Hernandez provided information on organizational changes. Ms. Patrick headed a very large organization with many issues. He was always available and responsive.

Some community members were very aggressive. Mr. Hernandez took the time to attend both scheduled and off the cuff meetings with individuals who had concerns about an issue. His openness and willingness to address an issue immediately, without any delay, was impressive.

In his capacity Mr. Hernandez really tried to lead the organization, and was creative and thoughtful in meeting goals. He worked very well with the Board, which consisted of nine voices with sometimes conflicting concerns. He protected the department heads when necessary and did a great job balancing the administration and the politics, which is no small feat.

Several major personnel issues involving union members were escalated to upper management. Mr. Hernandez was not required to attend the meetings but he came to help negotiations. The union had between 500 and 600 members. He helped navigate the very rocky road between the union relationship and County protocol. He showed great initiative in addressing problems that existing prior to his arrival. He helped resolve long-standing issues in only 2 to 3 meetings.

Mr. Hernandez was given directives to create a business plan for the new Panther Stadium. The process took several months and he worked with several departments to create the business model. He also worked on a new transportation plan that was very complex. The process has spanned for several years and involves 15 of the 31 cities in Broward County.

Reference Notes

Roberto “Rob” Hernandez

They were short 800k in a capital budget of \$5 million dollars. Mr. Hernandez worked with the staff to review the overall budget and prioritize projects. Several of the big-ticket items related to technology were prioritized, and he found a way to upgrade their enterprise software.

They only knew each other for a few years, but Ms. Patrick does not know anything controversial that involves Mr. Hernandez.

Broward County has a \$6.5 million dollar budget with 31 cities plus some incorporated areas. Ms. Patrick would hire Mr. Hernandez and feels he is well suited to run a community the size of Broward County or slightly larger. Every department head he worked with has a positive opinion of his management and leadership qualities. Employees are comfortable working with him and felt very supported by him. He ensured that Ms. Patrick had the financial resources she needed. She confidently recommends him for a Manager position.

Words or phrases used to describe Roberto Hernandez:

- Extremely thoughtful,
- Very intelligent,
- Incredible business mind,
- Perfectly capable administrator,
- Incredible leadership qualities, and
- Shows initiative and foresight to present quantifiable outcomes.

Strengths: Thoughtful; understands policy and procedures; public administration; learns what he needs to know.

Weaknesses: He could have a greater understanding of the different lines of work that each department head was responsible for.

Van Johnson – Mayor, City of Savannah, GA 912-651-5988 912-651-6444

Mr. Johnson worked with Mr. Hernandez between 2016 and 2019 when Mr. Hernandez became the Savannah City Manager. Mr. Johnson and Mr. Hernandez had a good relationship.

Mr. Hernandez performed decently as City Manager. He was smart, strong-willed, and a hard worker. He was a workhorse who innovatively tried to find solutions to problems. He was always quite professional, cordial, and direct. At times, his passion and directness may have caused people to think Mr. Hernandez was emotional or overly direct. However, these traits were a function of his military background.

Mr. Hernandez had good communication skills. He kept Mr. Johnson informed via email, phone, and personal communication when appropriate. Mr. Hernandez generally made good decisions and usually made good decisions when hiring personnel. He was customer service oriented. He accomplished tasks in a timely manner.

Additionally, Mr. Hernandez tried to make the City to a high-performing organization. He recognized several structural financial issues within the City and put the City on track. He was

Reference Notes

Roberto “Rob” Hernandez

both a leader who rallied employees around the organization’s vision and a manager who oversaw processes behind a desk. He worked hard to effectively solve problems to the best of his abilities. For example, he brought about a strategic plan for the City, which had not existed prior to Mr. Hernandez’s arrival. He led the Council and the organization to determine a goals and priorities. The Savannah Forward strategic plan is still currently used.

One of the largest criticisms against Mr. Hernandez was that he was less social than the public expected their Manager to be. Certainly, he was kind and polite. He had experience working with the public and sometimes was out in the public attending community meetings to represent the organization. However, he often worked more than he socialized.

At times, Mr. Hernandez experienced some difficulties wading through the City’s Council-Manager form of government. These hardships were not entirely his fault because some councilmembers violated these lines at times. Usually, Mr. Hernandez persevered. Eventually, these challenges became too much for him to bear. For example, he proposed instituting a City fire fee similar to what Florida cities used to address the City’s structural deficits. The Council accepted the idea. However, when the public became upset with the fee, the Council blamed him for the failure. Furthermore, the previous Mayor needed a scapegoat for some of his poor decisions and blamed Mr. Hernandez – even though the City Manager only carried out decisions made by the City Council.

Mr. Johnson is unaware of anything in Mr. Hernandez’s background that will concern a future employer. If given the opportunity to rehire Mr. Hernandez, Mr. Johnson would consider him as a candidate. Given the difficult circumstances in Savannah, Mr. Hernandez was a great Manager.

Words or phrases used to describe Rob Hernandez:

- Smart,
- Strong-willed,
- Hard worker,
- Good work ethic,
- Innovative, and
- Professional.

Strengths: Work ethic, innovative solution finding.

Weaknesses: Mr. Hernandez’s passion and directness may have been misconstrued as being emotional or overly direct.

Claudette Bruck – former Commissioner, City of Coral Springs, FL 954-562-2526

Ms. Bruck has known Mr. Hernandez since 2011. He was their Deputy City Manager for all too short of a time. They were sad to see him leave and would love to have him back.

Mr. Hernandez was extremely bright, very diligent and focused. When he first came to the city he first stood back and analyzed the organization. When it was his turn to speak, he impressed

Reference Notes

Roberto “Rob” Hernandez

everyone. His presentations are flawless but factual. Everything he said was entirely trustworthy; he presented information he could stand behind.

Their interactions were all professional. Mr. Hernandez was very respectful. He listened and was prompt in responding to inquiries. His decisions when hiring personnel were very good. He was innovative and operated at a high performance level. He listened, assessed a situation, and then came forward with an excellent recommendation. He was very experienced and innovative.

Mr. Hernandez frequently gave presentations at workshops, commission meetings and community meetings and always did an excellent job. He had good rapport with the audience and a demeanor that invited trust.

Mr. Hernandez kept the Commissioners informed as appropriate. The Manager’s office operated independently of the Commission. Rather than reporting in on a daily basis, they did so at special meetings or as needed. Mr. Hernandez did not have the opportunity to work one-on-one with residents, but he did present information about projects to the community. He was always prepared and answered questions on the spot.

The Commission received much information from varying sources, and the information was not always accurate. They felt very fortunate to have Mr. Hernandez on staff and trusted his accuracy. He led the organization well because he earned the trust of employees.

Mr. Hernandez played a significant role in pension discussions. He responded to questions at community and commission meetings. He followed through and was customer service oriented. He always did what said to do. He was not directly involved in the finance department or the creation of the budget, but he had a good understanding of the numbers.

Ms. Bruck is unaware of any controversy involving Mr. Hernandez. She would hire him and feels he would be a great Manager. He was knowledgeable, experienced, task oriented, focused, and could always be trusted. His departure was a tremendous loss to Coral Springs.

Words or phrases used to describe Roberto Hernandez:

- Trustworthy,
- Bright,
- Quick study,
- Serious about his position,
- Honorable, and
- Innovative.

Strengths: Very thorough; brought an idea forward only after it had been thorough researched; good at identifying problems and determining solutions.

Weaknesses: None identified.

Reference Notes

Roberto “Rob” Hernandez

Brooks Stillwell – former City Attorney, City of Savannah, GA 912-484-1690

Mr. Stillwell worked with Mr. Hernandez between 2016 and 2019. During this time, Mr. Stillwell was the Savannah City Attorney and Mr. Hernandez was the City Manager. They worked closely together daily and reported to the City Council.

Mr. Hernandez was a great City Manager operationally. He worked hard and had good fiscal planning abilities. He had several good ideas for the City and was a good strategic planner. He possessed a long-term vision of what he wanted to accomplish and strove to quickly achieve those goals. He was driven and dedicated.

Mr. Hernandez managed day-to-day operations exceptionally well. He worked well with staff members and those close to him in the office. He met with Mr. Stillwell during weekly meetings with City leaders and kept the City Attorney well informed.

As a change agent, Mr. Hernandez came in and proposed several changes to help the City run better. He initiated several positive transformations, such as with implementing the City’s strategic plan. However, Mr. Hernandez implemented other changes too quickly for the historical City to handle. For example, he tried to completely change the City’s property exchange, planning, and financing. Each area’s change was tough individually, but all these at once were especially difficult to maintain.

Savannah is a very unusual city. Its roots go back almost 300 years and Mr. Hernandez did not fully appreciate how the City’s unique historical culture differed from the culture found in his previous positions in Florida. In past jobs, he rarely handled city politics as the person second in charge. In Savannah, he had to involve himself more than he had previously done. The City traditionally expected the City Manager to be its Chief Executive Officer and to be heavily involved with the entire community outside of city government organization. As such, Mr. Hernandez had to work with county officials, chamber commerce, state legislature, and community leaders. Though Mr. Hernandez worked well with staff, he did not see community politics as part of his job, which was a large issue for the City. He frankly did not anticipate the public blowback from some of the programs he recommended the City Council implement. As such, he faced many challenges.

Even though many of his ideas were conceptually good, Mr. Hernandez was unable to bring the public to side with his solutions. For example, he tried implementing a fire fee to unburden property owners’ taxes. He saw the fee as a method of fixing the City’s fiscal problem. Though he initially had the Council’s support, Mr. Hernandez eventually faced huge public backlash. Then some council members tried to politicize the plans which led to the fee being poorly implemented. Mr. Hernandez also tried to implement a union contract with the fire union, which ended up facing public blowback as well. He had little Council support because such a plan did not translate well to Georgia.

Eventually, Mr. Hernandez left the City to return to Florida. Both his wife and he were unhappy with how rough this period was for them. He gave several months’ notice before his resignation.

Reference Notes

Roberto “Rob” Hernandez

Despite these issues, Mr. Hernandez was a great City Manager. He spoke well with public groups. He was an excellent fiscal manager. He generally made good decisions and hired personnel quite conscientiously. He was particularly customer service oriented. He was a leader who had a vision of how to accomplish goals and who tried to mold the City’s organizations to this vision. He accomplished tasks in a timely manner. He set goals and timeframes to move forward. He solved several problems effectively. He successfully implemented the complete reorganization of the City’s organizational department. He worked hard through stress to overcome issues. He also was outstanding with crisis management, such as when the City dealt with two hurricanes.

Any future employer will need to discuss what they expect Mr. Hernandez to do and what he expects to do with public and community leadership. These clear explanations are critical. Mr. Hernandez will perform well under a strong County Manager or strong Mayor who assumes all roles of working with the public. Mr. Hernandez understands how this type of government is organized and will do well in this system. Mr. Hernandez was an excellent City Manager on a whole, just not for the City of Savannah.

Mr. Stillwell is unaware of anything in Mr. Hernandez’s personal background that will concern a future employer. Though Mr. Stillwell would not rehire Mr. Hernandez for the City of Savannah, Mr. Stillwell would definitely hire Mr. Hernandez for most any other municipality. A future employer will not find a more dedicated, hardworking person who can implement ideas well. Mr. Hernandez has been and will continue to make a good Manager.

Words or phrases used to describe Rob Hernandez:

- Tremendously hardworking,
- Good strategic planner,
- Aggressive in a good way,
- Dedicated, and
- Visionary.

Strengths: Long-term planning, fiscal planning, management skills.

Weaknesses: Interacting with public and political leaders was hard for Mr. Hernandez, who was used to a more strictly managerial position.

Zachary Williams – former Fulton County Manager, GA 404-990-6545 404-371-2881

Mr. Williams has known Mr. Hernandez since 1994. They worked closely from 2008 to 2011 when Mr. Hernandez was the Deputy County Manager. He did an excellent job. His work performance, personality, and interactions were outstanding. He was handpicked from South Florida to come and work for Mr. Williams.

Mr. Hernandez had an excellent work relationship with his elected officials. They trusted that what he said to had been well researched. He earned their respect and represented Mr. Williams very well.

Reference Notes

Roberto “Rob” Hernandez

Once he had been given a problem to solve, Mr. Hernandez was tenacious. He marshaled resources and focused them through team building to get the job done. He did not shy away from challenges. He was patient when it was warranted; however, it did not come naturally to him.

Mr. Hernandez preferred face-to-face interactions whenever possible. If meeting a person directly was not an option, then he used the phone. He was an excellent writer and could be successful using email; however, he had developed respect from his subordinates by meeting with them personally, listening to their issues, and explaining his thoughts.

Depending on the nature of the decision that needed to be made, Mr. Hernandez responded quickly. Circumstances that required gathering facts may have taken him longer. He was not indecisive but rather took the appropriate amount of time to gather the information and opinions he needed to make good decisions.

Mr. Hernandez hired good employees. In some instances where a hire did not work out, he did all he could to work with them. He went through exhausted hiring practices involving many stakeholders. He was analytical and used that to his advantage in the hiring process.

Mr. Hernandez was innovative but did not try to change things just for the sake of change. He was mature enough to leave a process alone when it worked well. He had improved existing processes in Fulton County.

Mr. Williams was proud of the redevelopment that was carried out on Fulton Industrial Boulevard. Under Mr. Hernandez’s leadership, an area known for drugs, prostitution, and crime had reversed its negative direction to become an area where businesses wanted to locate. Mr. Hernandez created momentum in this large container warehousing district. He acquired State funding and formed a commercial improvement district.

There were very few tasks in public service Mr. Hernandez could not do well. He is ready to take the helm of an organization and become a Manager. Mr. Williams gives him his full and complete endorsement and support. Mr. Hernandez was one of the best public servants Mr. Williams has ever worked with.

Words or phrases used to describe Roberto Hernandez:

- Embodies what public service should be,
- True believer in the mission to make other people’s lives better,
- Tenacious,
- Analytical,
- Hardworking, and
- Professional.

Strengths: Problem solving; tenacity; marshaling resources; and team building.

Weaknesses: He could be patient when it is warranted; however, it did not come naturally to him.

Reference Notes

Roberto “Rob” Hernandez

**Dele Lowman – former Assistant to the County Manager, Fulton County, GA
(404) 612-8331**

Ms. Lowman worked with Mr. Hernandez in the Fulton County Manager’s Office. She had known him since 2003 where they worked together in Broward County. They had a good working relationship. He was very diligent and mission focused.

When Mr. Hernandez first arrived in the Administrative Office in Broward, she was working as a graduate being mentored by the County Administrator. She was told to watch Mr. Hernandez and learn from how he took a task, broke it into small parts, and organized people to get the job done. If there was something he did not know he studied to become more effective.

Mr. Hernandez and Ms. Lowman had philosophical differences yet got along quite well. His military background had shaped his personality and made him the driven person he was. He worked well with elected officials. He spent most of his time with the commissioner over the unincorporated areas. Though their interests were not always the same, they worked well together. He had the respect of the commissioners. Mr. Hernandez valued loyalty. His greatest strengths were diligence and following through. No matter how difficult a situation had become, he did what he needed to for the best interest of the community.

Laser focus was both strength and a weakness for Mr. Hernandez. In his current role as second in command, he did what he was asked without stepping back to see if there was another way. If he was the final decision maker, perhaps that would have been different. Unlike many managers, Mr. Hernandez did not have an aversion to staff meetings. He liked to speak with people face-to-face. He was more than capable of interacting via telephone and email, but he favored the personal approach when dealing with direct reports.

Mr. Hernandez was a great public speaker. He had a teaching background in the military. He interacted well with the public and dealt with residents often in the unincorporated area.

One task Mr. Hernandez was asked to take on was building the first amphitheater on the south side of the county. It was an overwhelming project with an unreasonable timeline and difficult budget. He did an outstanding job and followed it through to opening day.

There are certain people Ms. Lowman has worked with that she would hand pick to be on her team and Mr. Hernandez is one of them. She highly recommends hiring him.

Words or phrases used to describe Roberto Hernandez:

- Focused,
- Reliable,
- Diligent,
- You can trust him to do what he says,
- Professional and,
- Hard working.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Diligence; follow through; loyalty.

Weaknesses: Laser focus, however he might step back if he were the manager.

Bill Durrence – former Alderman, City of Savannah, GA 912-247-8108

Mr. Durrence worked with Mr. Hernandez between 2016 and 2019. At the time, Mr. Durrence was in his first term as Alderman. Mr. Durrence was one of the Savannah City Councilmembers who hired Mr. Hernandez to be City Manager. Mr. Durrence was one of Mr. Hernandez’s directors.

Mr. Hernandez possessed an impressive and thorough understanding of the City. He had extensive knowledge from public works to finance. He was as open as possible with councilmembers. Even though working for nine directors made things complicated, Mr. Hernandez was exceptionally competent and provided numerous innovative ideas. He was good internally and developed good staff relationships. He accomplished tasks in a timely manner. He was highly skilled in running the City.

Mr. Hernandez offered many solutions to the City’s issues. He helped councilmembers understand the reason for the City’s problematic budget stresses. Although the City was a successful destination for tourism, very little of that money went to the City’s coffers. Certainly, some sales tax revenue came to the City, but most went to businesses involved with tourism. Mr. Hernandez clearly identified the City’s financial stress points.

As good as he was with finances, Mr. Hernandez struggled to maintain public posture as Savannah City Manager. First, he underappreciated the historical nature and character of the City that brought much community pride. Because historic landmarks and districts made the City different, many people expected solutions to be likewise unique. Local attitude often discouraged researching how other places solved similar problems. Mr. Hernandez’s approach to look at other cities’ solutions made people feel slighted. As such, he missed an opportunity to engage early and gain the public’s support. Second, he was generally more of a hands-on manager who seemed uncomfortable interacting in social management of a highly networked City. He was more comfortable rolling up his sleeves and working than being a public face for the City. Because he did not engage people to his side, he was less effective than he could have been.

Mr. Hernandez generally made good decisions. He also hired well for many top staff members, including the Fire Chief, Police Chief, and Human Resources Director. He often reached out to other senior staff when looking for personnel, and this collaborative approach was helpful. Some personnel he inherited were not highly qualified for their positions. At one point, Mr. Hernandez successfully moved senior personnel to fill vacancies. Prior to this major shuffle, staff members were scattered all over the City, causing much unnecessary work. He consolidated staff, thus making processes more efficient. Occasionally, Mr. Hernandez needed to be more disciplinary, but he eventually let a number of problematic people go. For example, he fired the Director of the Department of Revenue because she was simply unable to fix a particular issue, even after being given adequate time and resources.

Reference Notes

Roberto “Rob” Hernandez

Mr. Durrence is unaware of anything in Mr. Hernandez’s background or conduct that will concern a future employer. If given the opportunity, Mr. Durrence would rehire Mr. Hernandez. Being new to a large leadership position as Alderman, Mr. Durrence understands the learning curve Mr. Hernandez faced while being City Manager for the first time. Mr. Hernandez was a bright individual who experienced valuable lessons. He was a good Manager.

Words or phrases used to describe Rob Hernandez:

- Knowledgeable,
- Competent,
- Introvert,
- First rate manager,
- Innovative, and
- Open.

Strengths: Financial skills, extensive understanding of how to run a city, executive functioning.

Weaknesses: He did not fully appreciate the City of Savannah’s uniqueness and had a hard time connecting with the City’s people.

William “Bill” Hubbard – Chief Executive Officer, Savannah Area Chamber of Commerce, GA 912-657-9207

Mr. Hubbard and Mr. Hernandez interacted when Mr. Hernandez was the Savannah City Manager between 2016 and 2019. They have since messaged each other occasionally.

When Mr. Hernandez worked in the City, he communicated fairly regularly with Mr. Hubbard. Mr. Hernandez called and sent emails. He sometimes dropped by Mr. Hubbard’s office, and they typically saw each other weekly during city events.

Mr. Hernandez was a decent City Manager. Mr. Hernandez was a good, smart man. He was quite professional and thoughtful. He had good financial grounding. He built good staff around him and organized them well. He generally made good decisions. He also did a great job with reorganizing the city staff. At times, though, Mr. Hernandez made some poor staffing decisions. For example, he left an engineer in a developmental position a bit longer than others might have preferred. Additionally, he let go an assistant city manager by leaving a note on her chair. Although several elected officials asked him to let her go, this approach was unprofessional.

Mr. Hernandez faced difficulties integrating himself in the community. As a first time city manager, Mr. Hernandez was not accustomed to being one of the City’s key leaders. He wanted to ensure others did not accuse him of playing favorites. As such, he interacted with the philanthropic, nonprofit, church, and business communities on a purely business level. He experienced difficulty developing tough enough skin to deal with criticism. This weakness held him back and

Reference Notes

Roberto “Rob” Hernandez

undermined his ability to be effective. Despite his strengths as City Manager, his inability to fully participate in the community affected the public’s confidence in him. He needed to get to know these smaller communities better.

Mr. Hernandez was a good manager who oversaw processes behind a desk. He had great management skills and good knowledge of running a city. He thoroughly researched various solutions and made decisions effectively. For example, he led a team in providing a strategic plan in a fairly short time period. He worked with elected officials to agree to this plan.

Unfortunately, Mr. Hernandez had challenges working through the politics to implement the strategic plan. In one instance, Mr. Hernandez proposed a fire fee to help city finances. Around this time, the City had collected approximately \$10 million in revenue. While garnering public support for the fire fee, Mr. Hernandez was also especially transparent with this revenue. Because the public misunderstood how the revenue was not part of the City’s own earnings, people were particularly upset with the fee. Mr. Hernandez had admirable intentions to be transparent, but his timing cost him the fire fee concept.

Despite these challenges, he was always polite and diplomatic with people. Even when church groups angrily protested and wanted him fired, he kept going. He handled stress well for the most part and never showed a temper. Eventually, however, Mr. Hernandez and his wife left the City because they felt alone.

Mr. Hubbard is unaware of anything in Mr. Hernandez’s professional or personal conduct that will concern a future employer. Mr. Hernandez had been purely professional, honest, and transparent. Although Mr. Hubbard would not rehire Mr. Hernandez to be City Manager, Mr. Hubbard would consider Mr. Hernandez for an Assistant Manager position. Mr. Hernandez was strategic and smart. He would excel in the responsibilities expected of a Deputy Manager.

Words or phrases used to describe Rob Hernandez:

- Professional,
- Good guy,
- Quite thoughtful,
- Polite,
- Diplomatic, and
- Capable.

Strengths: Financial skills, building good staff.

Weaknesses: He was politically weak and often distant from constituents.

John Hearn – City Attorney, Coral Springs, FL 954-344-1011

Mr. Hearn has known Mr. Hernandez since 2011. In terms of job performance, Mr. Hernandez was very energetic and a go-getter. He really moved projects along and stayed on top of them. He was a change agent.

Reference Notes

Roberto “Rob” Hernandez

City Hall was in an office that was built by General Electric for selling homes. The City had been trying to build a City Hall since 1993. Mr. Hernandez really energized those involved, and the new City Hall was finally under construction.

Mr. Hernandez was always very involved in the community, and he attended community meetings. He had a very good relationship with the public. He was customer service oriented.

Mr. Hernandez led staff to fulfill the vision of the Board. Employees did not have much appetite for moving forward with the downtown development, which included the new City Hall. He took the bull by the horns and made a very detailed PowerPoint presentation showing all the issues that their current City Hall had. He demonstrated how having a vibrant downtown area would benefit the City and residents. He did a nice job leading the project.

Mr. Hearn was not directly involved with the budget and finances, but in the course of their conversations he came to believe that Mr. Hernandez had good financial skills. Mr. Hernandez completed tasks by the deadline given.

Mr. Hernandez had not been involved in anything personally or professionally controversial. He left Fulton County because his family wanted to return to Florida. When an opportunity opened up on Broward County, he embraced it. He moved forward when doing so made sense.

Mr. Hearn would hire Mr. Hernandez and had a positive experience working with him. Mr. Hernandez would be a good City or County Manager. The five Commissioners and City Manager in Coral Springs loved working with Mr. Hernandez.

Words or phrases used to describe Roberto Hernandez:

- Energetic,
- Outgoing,
- Positive,
- Change agent,
- Engaged, and
- Active.

Strengths: Energetic; very much wanted to make decisions; could shepherd a project from A to Z very well.

Weaknesses: People’s greatest strengths are often their greatest weaknesses. Because he moves projects along so well, Mr. Hearn had to slow him down a little and occasionally reminded Mr. Hernandez of a step that needed to be taken in the process.

Prepared by: Danielle Dayton and Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

WLRN News HD1 (FL)
February 21, 2020

Fort Lauderdale Officials Respond to \$1.8 Million State Fine for Sewage Spills

Author: *Alexander Gonzalez & Tom Hudson*

Pipes in Fort Lauderdale keep breaking--it's been an almost daily reality for many people living and working in the city. More than 200 million gallons of sewage have spilled from busted pipes in Fort Lauderdale since December. The state responded to the sewer spills this week. The Florida Department of Environmental Protection fined the city almost two million dollars. That amount is based in part on how much sewage has spilled. On the South Florida Roundup, host Tom Hudson talked about the issue with WLRN's Broward County reporter Caitie Switalski and Fort Lauderdale's deputy city manager **Rob Hernandez**.

Here's an excerpt of their conversation: Tom Hudson: What are the funding options if the city has to pay the state this \$1.8 million fine or any fine for that matter?

Rob Hernandez: Well, if we have to pay the fine, it's either going to have to come out of the Water and Sewer fund or the city's general fund. And again, we believe that \$1.8 million will best serve our local residents and our taxpayers by being reinvested into some of these projects rather than just going in and being deposited into a general fund at the state level. We're not being critical of the state. We understand that they were in the position where they felt that they had to take some sort of action. But we're hopeful that we'll be able to work something out that is slightly different than just the fine.

Caitie Switalski: When it comes to the punitive nature of the fine, \$1.4 million of the \$1.8 million is civil penalties based on how much sewage and how many days the sewage spill went on. I know the city is in the middle of weaning off trying to take money out of those funds [general or Water and Sewer funds] to balance the regular budget. That was a practice leftover from the last city administration. But if the city has to pay part of this fine out of those funds again, have you heard from any residents about that?

Hernandez: No, we haven't heard from any residents. And certainly I don't think it's going to change the practice. The city commission has made it abundantly clear that we were going to transition away from transferring funds from the Water and Sewer fund into the general fund. The city commission that's currently in office directed the city manager to transition us over a four-year period. They have since directed us to accelerate that transition. And that's something, going into next fiscal year, that we're certainly looking at. If there's an opportunity to return those funds at midyear this year, that's something that our city manager is looking at. But I don't think that the fine is going to derail us from making progress. And using your word, "weaning" ourselves off of that budget transfer. We're under clear direction that the funds that are generated by the Water and Sewer fund are going to go back into the necessary improvements that need to be made. And certainly we've been working in that direction for the last couple of years and we will continue to do so.

South Florida Sun Sentinel (FL)
July 23, 2019

Fort Lauderdale: Contractor Who Broke Water Main Wasn't Digging Where it told us

Author: *Larry Barszewski*

Fort Lauderdale never warned a contractor that a critical water line lay buried where workers planned to dig last week, a report shows, but city officials say that's because the contractor supplied the wrong address. The misinformation led to a failure that ultimately dried up the city's water supply and led to days of boil-water orders. Taps ran dry hours after the contractor drilled into the water supply line July 17. Countless businesses were forced to close, and more than 200,000 people were left without water to drink or shower. The contractor, Florida Communication Concepts, used a service called Sunshine 811 to find out whether there were underground utilities it had to watch out for while doing work for Florida Power & Light Co. The statewide utility service is authorized under Florida law and is the state's official resource for companies and individuals planning underground work.

The report shows Fort Lauderdale never told the contractor that the site in the back of 2525 NW 55th Court contained a 42-inch pipe that supplied raw water to the main water treatment plant. Instead, the city indicated that it didn't provide service there, according to the report from Sunshine 811. Deputy City Manager **Rob Hernandez** said the city's water line isn't on that property; it's 75 feet north. The digging was being done to the north and east of the requested location, he said. "It appears that where the contractor was digging is not where they indicated on the 811 ticket," **Hernandez** said. "Our investigation is still ongoing." The owner of Florida Communication Concepts, Tim Hicks, said he couldn't comment, and FPL has declined to answer reporters' questions.

Contractors contact Sunshine 811 to alert agencies about the work they plan to do and to find out whether there are pipes or underground facilities they need to avoid when digging. The service then alerts the utilities, which are supposed to inform the contractor whether they have lines in the area and mark them if they do. Florida Communication Concepts filed a ticket with Sunshine 811 on June 25 to install conduit in July for FPL near Fort Lauderdale Executive Airport, records show. Sunshine 811 notified Fort Lauderdale and nine other entities, based on maps they submitted to Sunshine 811 that indicated it was possible they could have equipment near the work site. Tamarac and Crown Castle Fiber responded that they had no facilities there. Oakland Park, Teco People's Gas of South Florida and CenturyLink said their lines were outside of the work site.

Others said they did have equipment in the area. Fort Lauderdale Executive Airport, Comcast Cable, AT&T and FPL indicated that they marked the locations of their lines for the contractor. Fort Lauderdale responded as well, but it used a code indicating that no city utilities were present at that excavation site. The code it used said "another company provides the services at this location." That code typically is used by utilities that do not have services at that exact location, according to Sunshine 811's online site. **Hernandez** said that's because the city doesn't have any water lines at the property address the contractor listed. He also said Florida Communication

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Roberto Hernandez
(Articles are in reverse chronological order)

Concepts said on its Sunshine 811 form that it would not be doing boring, but that's how the city's pipe was pierced. Fort Lauderdale receives dozens of requests each day from Sunshine 811 for underground line information. Sunshine 811 sent the city 20,501 notices last year and 12,635 so far this year, the service reported. The requests go to the city's distribution and collections chief for its water and wastewater services. A city police report filed at the time the line was punctured said the company had used the line-locating service. However, it cited Florida Communication Concepts for not having a permit for the work, violating city codes. It issued the contractor a "Notice to Appear" citation. City officials said a date has not been set for a hearing. It's not clear whether a permit was needed. **Hernandez** said last week that FPL has a franchise agreement with the city that does not require the utility to get a permit every time it digs.

Post Gazette (PA)
July 19, 2019

Fort Lauderdale gets 'Temporary Relief' While Crews Repair a Water Main Break

Author: *Dakin Andone & Emanuella Grinberg*

Officials in Fort Lauderdale, Florida, said a temporary fix water has running again after a main break left an estimated 220,000 customers without service Thursday. Water is flowing below normal pressure and is expected to return to "near normal" sometime Thursday night, Mayor Dean Trantalis said in an evening news conference. A subcontractor repairing electric lines on Wednesday struck a pipe that supplies water to a treatment plant, cutting off the city's water supply. No major incidents were reported as a result of the outage, the mayor said. A partial patch was placed on the hole, increasing water pressure, Mr. Trantalis said. Those involved in the repairs are "confident" that the patch will provide "temporary relief" while crews work to redirect the water flow through a backup line and replace the broken pipe, he said.

The installation could take through the weekend, Mr. Trantalis said. While repairs are underway, a boil water advisory is in effect until and water distribution sites will stay open until at least Saturday, Mr. Trantalis said. With repairs underway, he said the city's focus will shift to investigating the cause and seeking compensation for not only the city but hotels, restaurants and other businesses impacted by the service outage. "This was not just a minor incident, this impacted many hundreds of thousands of hundreds of people," Mr. Trantalis said. "It was clearly haphazard," he said. "It's clearly something that we're going to seek retribution for."

What the city is doing to fix the pipe

On Wednesday, a subcontractor working near the city's Executive Airport for Florida Power & Light damaged a 42-inch city pipe that supplies water from wellfields to the Fiveash Water Treatment Plant, the mayor said. The service outage impacted the city and surrounding municipalities that receive water through the city, including Lauderdale-by-the-Sea, Oakland Park, Wilton Manors and sections of Davie and Tamarac. An estimated 220,000 customers were impacted, Deputy City Manager **Rob Hernandez**. Crews are now building a concrete bunker around the broken pipe to seal the break and protect the pipe, Mr. Trantalis said. The bunker should be completed by 10 p.m. ET and the Fiveash Water Treatment Plant should be back to full and normal operation, he said. The temporary fix will give crews time to redirect the water flow through a backup line, Mr. Trantalis said. Once the backup line is in place, a replacement pipe for the primary main will be installed, likely over the course of the weekend, the mayor said.

Cause of outage under investigation

Earlier Thursday, Mr. Trantalis said crews responded immediately, but as they were working, the damaged pipe collapsed, forcing the city to turn off the water flow. During Thursday night's news conference, he suggested the subcontractor bore the brunt of the blame for "something they should not have done." The subcontractor has been cited and an enforcement action has been launched, the mayor said, although he was unable to identify the specific citation. When initially asked if there was anything the city could have done better, the mayor responded "no," then

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(Articles are in reverse chronological order)

added, "Yes -- we could have foreseen this but you can't foresee these types of things." Later in the press conference, the mayor maintained the incident an "accident" caused by "human error," but he also acknowledged that it put a spotlight on the city's redundancy systems.

Deputy City Manager **Rob Hernandez** said "difficulty" with at least one valve that was supposed to redirect water to the redundant system, leaving them unable to isolate the damaged section of pipe. "What [this] pointed out to us is that we need to pay more attention to our infrastructure needs and that we need to go back and make sure that these redundancies systems do work when they're supposed to work." Residents in need of bottled water can find it at the Beach Community Center on 33rd Avenue, Mills Pond Park on Northwest 9th Avenue and Riverland Park on Southwest 27th Avenue.

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Roberto Hernandez
(Articles are in reverse chronological order)

SavannahNow

Posted May 26, 2019 at 8:18 PM Updated May 27, 2019 at 12:29 AM

Savannah's city manager out on medical leave

By DeAnn Komanecky and Eric Curl

Savannah City Manager **Rob Hernandez** is out on medical leave, with Patrick Monahan now serving as acting city manager. **Hernandez** tendered his resignation on April 12 with a last work day date of June 30. Whether **Hernandez's** medical leave will change when he leaves his post is not known. City spokesperson Ken Slats said no other details are currently available. Monahan, a former Chatham County assistant manager, was hired in April as a consultant to work with **Hernandez**, starting in May. Monahan retired from the county in 2013 and has said he would only take the interim position temporarily, but is willing to stay long enough after this fall's election for the new city council to hire the long-term manager next year. He will be paid \$20,000 a month for up to 12 months, under the agreement.

Hernandez's resignation came after news broke of his pending departure for a job as deputy city manager of Fort Lauderdale, Florida. **Hernandez** declined interview requests regarding his resignation, but said in a subsequent press release that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. He indicated there was more to the decision than just family reasons, however, in correspondence obtained by the Savannah Morning News. **Hernandez** said he intended to stay away from city manager positions for a while after being asked about his plans by Lake Wales, Florida, City Manager Kenneth Fields. "The last three years here have been tough as a (city manager)," **Hernandez** said. He responded in a similar manner to an April 12 email from Chatham County Engineer Leon Davenport. "Tough town," **Hernandez** said. "Going back to Fort Lauderdale."

The city council hired **Hernandez** as city manager Sept. 1, 2016, with a \$238,000 salary and \$600 monthly vehicle allowance, as well as a \$7,000 annual 457 retirement plan. After his arrival, **Hernandez** led the city through a major restructuring and successful development of a strategic plan. The city has also experienced two years of budget surpluses after **Hernandez** had implemented a hiring freeze and budget cuts. His impact was praised by some of his executive team following word of his departure.

City Management Coordinator Joe Shearouse Jr. wrote in response to his resignation notice that he thought a lot about the accomplishments **Hernandez** had made in Savannah. "Your impact on people is extensive and much more influential than a project or initiative," Shearouse said. "Your openness and eagerness to provide us opportunities to grow and learn is lasting and far reaching." Special Projects Coordinator Daphne Williams said in an email that it may be a long time before they get someone else comparable. "Our team was on fire," Williams said.

Hernandez also experienced his share of criticism, which began shortly after his arrival when he proposed cuts, which were ultimately restored, to arts organizations and social programs. And he was widely panned by residents following the implementation of a fee for fire service.

Hernandez had touted as a way to get all property owners — including those that are tax-exempt

Internet – Newspaper Archives Searches**Roberto Hernandez***(Articles are in reverse chronological order)*

— to contribute to the rising costs of providing fire protection. Public indignation only grew when **Hernandez** presented the council with a spending plan for a budget surplus from 2017 of more than \$10 million about five months after the fee was adopted. The fee was ultimately repealed, but **Hernandez** later attributed some subsequent job searches to the widespread opposition he encountered following its implementation.

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Roberto Hernandez
(Articles are in reverse chronological order)

Savannah Morning News (GA)
 April 29, 2019

Savannah Could Get More Affordable Housing Under These Proposed City Programs

Author: *Eric Curl*

About 44 percent of Savannah families cannot afford quality housing, according to city officials. In other words, almost 24,000 local households are cost burdened because they spend 30 percent or more of their income on housing, said Housing and Neighborhood Services Director Martin Fretty. To address the issue, the city is considering some new affordable housing initiatives that were presented to the Savannah City Council during a workshop Thursday. The initiatives include a \$20 million investment to acquire, redevelop and sell 1,000 blighted properties over a 10-year period. The investment would provide more affordable housing, while also reducing the number of abandoned properties that cost the city an average about \$1,300 a year each in lost tax revenue and expenses related to police, fire and code enforcement services, Fretty said. The city is hoping to get \$10 million for the acquisition program included on the Special Purpose Local Option Sales Tax referendum going before voters this fall. The eventual sale of the properties would go back into a revolving fund and help drive down costs for future investments, Fretty said. "After a couple of years you ought to be able to recover, we think, 80 percent of what we invested in the properties to acquire them," he said. The city is expected to meet with Chatham County officials next month to discuss the SPLOST project list and determine Savannah's distribution share of the sales-tax revenue. Savannah affordable housing presentation by savannahnow.com on Scribd. Inclusionary zoning. The city is also contemplating the implementation of an inclusionary zoning policy, similar to one established in Atlanta last year. The policy would require developers of apartment projects to include a certain percentage of affordable units or pay a one-time fee into a city housing fund. In turn, the developer could select from a list of incentives that could allow for more units, reduced parking requirements and a streamlined permitting process. In Atlanta the program applies to areas where the city is experiencing the pressures of redevelopment, said Bridget Lidy, Savannah's director of planning and urban design. In Savannah, the Canal District, where the new arena is being built west of downtown, provides an opportunity for the program's launch, Lidy said. "It's ripe for this," she said. The proposal received general support from the council, although it is still early in the process. Lidy was encouraged to set up a meeting with Atlanta officials, who she said have expressed interest in helping Savannah establish their own initiative.

And City Manager **Rob Hernandez** said he thought the city would likely need to hire an outside consultant before they could develop an inclusionary zoning policy. "I think we need to bring in the resources from other communities that have gone through that process," **Hernandez** said. "We haven't and there is a lot of stakeholder involvement and a lot of legalities involved." In the meantime, the city has developed some proposed standards to reduce development costs and increase the amount of affordable housing, including the reduction of the minimum lot size and parking requirements in traditional neighborhoods. In addition, the city's proposed new zoning ordinance, NewZo, provides more flexibility for constructing accessory dwelling units, with no more than one bedroom, in some areas. City officials are planning for the new ordinance to be adopted in July after public hearings are held in June.

Savannah Morning News (GA)
April 13, 2019

Hernandez Formally Resigns Post

Author: *Savannah Morning News*

Savannah City Manager **Rob Hernandez** formally submitted his resignation letter Friday morning. "Such letters are never easy to write and I hope it conveys my appreciation to all of you and our great staff, especially those that sit around the table with me each Monday," **Hernandez** wrote in an email to the city council and city staff. "I know that I've made some mistakes along the way as I am far from perfect. Please know that I have always attempted to do what is in the best interest of the city in the long term, and endeavored to create a culture of fairness, professionalism, integrity, inclusion, diversity, opportunity and ingenuity. I'm fortunate to have been surrounded by a team of good people. I'm grateful to have known you. Together, we've gotten a lot done since October 11, 2016. I hope that I have served all of you well," he wrote. "Thank you for the opportunity to serve as your city manager."

Fort Lauderdale City Manager Chris Lagerbloom informed the Savannah Morning News on Thursday that **Hernandez** will be joining the city as deputy city manager later this summer. In a formal resignation letter addressed to the mayor and alderman, **Hernandez** touted the team's accomplishments, from upgrading the city's bond rating to launching the design of the new arena. "I have been honored with the privilege of serving as Savannah's eighth city manager since adoption of the council-manager form of government in 1951. I joined the City on the heels of Hurricane Matthew on October 11, 2016, and since then we've weathered literal and figurative storms and overcame numerous obstacles in providing exceptional municipal services," **Hernandez** wrote. "We accomplished much during this time while simultaneously creating an organizational spirit focused on one simple concept: Forward. Forward is a fanatical passion for momentum, progress and achievement. It is an obsession with what is possible rather than the status quo. It is the driver behind our biggest accomplishment - SAVANNAH FORWARD, our guide to strategic policy-making and investments through 2025."

Hernandez said in a press statement issued later that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. His resignation is effective June 30. Savannah Mayor Eddie DeLoach has recommended that former assistant Chatham County Manager Pat Monahan serve as interim city manager, but he is awaiting support for that decision from the rest of the city council. A special meeting has been called for 6 p.m. Monday in the Media Room on the second floor of City Hall for the council to consider an interim city manager. The next city manager is not expected to be hired until after the new city council is sworn in next year following this fall's election.

Savannah Morning News (GA)
January 9, 2019

Savannah City Manager Rob Hernandez: Government Leadership Backs Savannah Fire Department

Author: ***Rob Hernandez***

There has been much discussion in recent days about staffing levels within Savannah's Fire Department. I would like to take this opportunity to address misinformation circulating in social and regular media outlets.

First, what the city government has not done:

- We have not closed any fire stations.
- We have not laid off any fire personnel.
- We have not left any neighborhood in Savannah unprotected.
- We have not taken steps that will delay Savannah Fire's response time to an emergency.

What we have done is eliminate vacant positions in Savannah Fire over the past two years. To put those reductions in context, I would like to take you back to 2014. For the first time that year, Savannah Fire was granted an ISO Class 1 rating — an insurance classification that evaluates a community's fire operations and water infrastructure. Less than 1 percent of fire departments in the nation are rated Class 1. The following year, in 2015, Savannah received a three-year, \$3.5 million FEMA grant designed to increase staffing levels in Savannah Fire. We did just that. In 2015, we added 15 firefighter positions. In 2016, we added another 15 firefighter positions. And in 2017, we grew by 10 more firefighter positions. Add it all up and over a three-year period we added 40 new firefighters to our payroll — a 12.6 percent staffing increase. At 366 total positions, including 341 firefighters, this was the highest staffing level in Savannah Fire's history.

That grant ended in 2017, and with it we faced a difficult decision: Do we ask Savannah taxpayers to continue funding this increased staffing level, or do we make reductions? We were facing flat revenues that year, and direction from city council to continue making investments in the police department. To balance the 2018 budget, we eliminated 45 vacant positions across the city government organization, including 18 within Savannah Fire. Council directed that those cuts come from Engine 16/Marine 1 — a specialized unit that operates the fire boat and a backup pumper truck at fire department headquarters on Oglethorpe Avenue. That same budget authorized a permanent funding solution for fire operations: the fire fee. That fee was rejected over the summer, and during months of public discussion we heard repeatedly from property owners that they preferred a smaller fire department over paying a new fee to fund fire services.

We contracted with the University of Georgia Carl Vinson Institute of Government to analyze Savannah Fire operations and make recommendations on better use of resources. I expect those recommendations within the month, but preliminary discussions with the report authors identified options for increased efficiency and reducing costs. The 2019 budget was balanced with the elimination of another 15 vacant positions. The UGA recommendations will drive where

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those reductions are made. It is important to note that even with the elimination of these 33 vacancies over the past two years, Savannah still has seven more firefighter positions today than we did in 2014, when we received our ISO-1 rating. And we are still well-staffed compared with communities our size; Charleston, for instance, has one fewer firefighter position than Savannah, and 24 percent more territory to cover.

As a resident or business owner in this city, you are served not just by the fire station located in your neighborhood, but a fire protection system consisting of 15 stations and 22 emergency response vehicles. The city government also maintains agreements with our adjacent cities, which provide us access to more than 20 other fire stations, firefighters, and equipment should they be needed in the unlikely event all of our resources are unavailable. No area of the city will ever be left without a response to a fire. We are fortunate to have one of the best fire departments in the nation. Savannah Fire will continue to be, even with these adjustments.

Rob Hernandez is Savannah's city government manager.

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WTOC 11

April 9, 2019 at 11:21 PM EDT - Updated April 11 at 10:36 AM

City of Fort Lauderdale extends offer to Savannah city manager

By Sean Evans

SAVANNAH, GA (WTOC) - Several sources have confirmed that Savannah City Manager **Rob Hernandez** is leaving his job. "The city is losing a very smart and talented individual," Savannah Alderman John Hall said. "I wish Mr. **Hernandez** the best wherever he goes. Our loss is another city's gain." **Hernandez** said that he has not officially tendered his resignation or discussed this with all of city council as a group. He said he will not release a statement until he felt it was the appropriate time. We've reached out to the mayor's office and the city spokesperson for comment.

Hernandez came to Savannah from Broward County, FL in 2016. "He inherited a virtual mess. Remember, he came in in the middle of a hurricane. The first hurricane we'd had in what, 27 years," said District 4 Alderman, Julian Miller. In addition to dealing with the aftermath of Hurricane Matthew, **Hernandez** was tasked with completing a budget and coming up with a blueprint that would carry Savannah years into the future. "He has come up with the city's first strategic plan and gotten it going. He has refined our logo so we have the same logo everywhere. There's an awful lot he has done, most of which the public will never see," Alderman Miller said. Several things spear-headed by **Hernandez** have been very public, like re-establishing a Savannah Police Department after the de-merger with the county, the search for a new police chief, and the fire fee proposal.

Less than a year after the fire fee proposal was dropped by city council after public backlash, **Hernandez** referenced it in a moment of levity during his speech at a firefighter award ceremony Wednesday afternoon. "Believe it or not, the city actually imposed a fire fee way back in the early 1800's to provide fire protection services to all property owners of the city. I wish I would've known that a year-and-a-half ago. That could have helped us sell what we were trying to do a little easier to those that were opposed to what we were trying to do," he said.

If **Hernandez** is in fact out the door like sources tell us, city leaders know they need a similar leader to take the helm. "When you run a city, there are so many moving wheels and so many gears going in different directions. There's always going to be hundreds of things that have to be addressed. That's why it's going to take someone who really knows what they're doing to pick up the mantle and go forward," Miller said.

Hernandez's previous attempts to change jobs have been publicized. In August of 2018, it was announced that **Hernandez** did not get a county administrator position in Pinellas County, FL. The city of Savannah confirmed he was a finalist for the position. **Hernandez** was also on the shortlist for a city manager position in Brownsville, TX. At the time, **Hernandez** said he wasn't sure if the Savannah community wanted to work with him. "Criticism of government is healthy and important, and comes with the territory," he said in a statement in August of 2018. "I don't take it personally, even if some of the attacks on me have been very personal. What I do want is

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to work in a community that wants to work with me. I am not sure that is currently the case. Amid a sustained level of criticism and uncertainty, I have considered opportunities outside Savannah. While I have no desire to leave, I did feel it was a prudent move for me and my family.” **Hernandez** was a key architect of a proposed fire fee in Savannah that drew the ire of many in the city. The city council withdrew the fee from consideration after a tortured fine-tuning process. The mayor proposed to halve the fee weeks before it was withdrawn.

Chaz Adams with the city’s strategic communications office says **Hernandez** has received an offer as Deputy City Manager for the City of Fort Lauderdale Florida. “The City of Fort Lauderdale has extended an offer to Roberto “Rob” **Hernandez** for the position of Deputy City Manager. The offer is contingent upon approval from the Fort Lauderdale City Commission. The commission plans to consider the item at their next meeting, which will take place on Tuesday, April 16,” Adams said. City council will hold its regularly scheduled meeting on Thursday. We’ll be following this closely to see if anything is announced regarding a resignation, as well as what’s next if the Savannah city manager position becomes vacant.

Savannah Morning News (GA)
December 20, 2018

Savannah City Council Oks \$1M Fire Station Sale Despite Buyer's History of Code Violations

Author: *Eric Curl*

The Savannah City Council on Thursday approved the sale of a former fire station, despite the buyer's history of being cited for code and maintenance violations at multiple properties throughout downtown. The \$1.05 million sale to Inman Park Properties came after three proposals were submitted to the city and evaluated by a five-person staff committee. Inman received the highest score after proposing to preserve and restore the 72-year-old building at 6 W. Henry St. for use as a cafe and office space. Rajesh Patel had proposed paying \$525,000 for the property, while Lynch Associates Architects offered \$455,000. The sale was quickly approved without discussion by the city council, with the exception of Alderman Bill Durrence, who had stepped out of the chambers to speak with someone who was leaving.

Durrence, who represents the area where the building is located, said he probably would have voted for the sale also. It was his understanding that most of the property maintenance issues have been addressed and he was hoping to see something done with the building, Durrence said. "The bottom line for me is that it didn't matter how I voted because the majority of council made up their mind that for that price point, they were going to sell it," he said. Inman's proposal is expected to activate the "somewhat stagnant" block and generate 75 full-time jobs in the neighborhood, according to the developer's proposal. Inman reported that construction was expected to begin 120 days after closing and take one year to complete.

Staff had delayed consideration of the sale in October following inquiries from the Savannah Morning News into the buyer's past code and property maintenance issues. From 2012 through 2016, the city instigated 16 Chatham County Recorder's Court cases against Inman's owner, Jeff Notrica, for 14 downtown properties. Charges related to overgrown vegetation, maintaining a clean and sanitary property, safety, defacement of property, accumulation of garbage, and an unsafe building. The pending sale comes after the approved sale this year of multiple downtown city properties. City Manager **Rob Hernandez** has touted the sales as a way to return outdated properties to the tax rolls and raise revenue for the construction of a new municipal center west of the Historic District, where the city is building a new arena.

However, **Hernandez** said during an interview Tuesday that the sales revenue may instead go toward construction of the arena. The amount of current voter-approved Special Purpose Local Option Sales Tax is expected to raise \$120 million, while about \$22 million was raised during previous tax periods. Still, the city expects to need an additional \$20 million to \$40 million to cover the estimated \$140 million to \$160 million costs of the arena's construction, as well as relocating public works from the arena site and building a new complex for that department, **Hernandez** said. The city does not plan on adding the arena to the next SPLOST referendum going before voters this fall, he said.

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Savannah Morning News (GA)
 November 16, 2018

Savannah Proposing Slight Property Tax Cut, Employee Wage Hike

Author: *Eric Curl*

The owner of a home valued at \$100,000 will save about \$8 a year under a proposal to reduce the property tax rate in 2019, according to city estimates. The reduction from 13.40 mills to 13.20 mills was requested by the Savannah City Council on Friday, the second day of a two-day budget retreat, after staff had initially proposed retaining the existing rate. Alderman Brian Foster advocated for the reduction to provide some relief to taxpayers after the rate was increased from 12.48 mills this year following the elimination of the widely opposed fire fee. "It's a start," Foster said. The council also directed staff to incorporate a 3.5 percent wage increase for employees next year. The proposed increase was agreed to as a compromise after Alderman Van Johnson had initially sought to bump staff's recommended 3 percent wage increase to 4 percent. "The fight for the best and the brightest is real and people ultimately go where they will be paid," Johnson said.

To maintain a balanced budget, while accommodating the council's wishes, staff said they increased their "conservative" projections for property tax revenue growth next year from 3 percent to 4 percent. In addition, staff plans to cut another \$1 million from the proposed budget to cover the remaining costs, said City Manager **Rob Hernandez**. The 2019 budget is expected to be presented to the city council for adoption next month. Since **Hernandez** arrived in late 2016, he has touted the need to address what he described as a structural imbalance resulting from expenses exceeding revenue. The fire fee adopted this year was an attempt to address that imbalance, but the council voted to repeal that new revenue source after facing widespread opposition from property owners.

Hernandez said he believes the city has made progress, but noted the concerns raised by the council during the retreat that funding was lacking for infrastructure and service improvements. "We're still imbalanced in that this budget is not able to adequately address those needs," he said. "We are addressing them, but the need really outstrips our ability to fund them." The next Special Purpose Local Option Sales Tax, which goes before voters next fall, has been touted by the council and staff as a way to fund needed infrastructure improvements, but **Hernandez** said the city cannot rely on the tax to resolve the issue. The city will also be looking at more models to fund municipal services, including a potential stormwater fee to cover the cost of drainage projects, **Hernandez** said. In July 2017, the city council unanimously approved a \$49,651 contract with Atlanta-based Stantec Consulting Services to study the feasibility of such a fee and how it would be implemented, but the study's findings have never been presented. "We continue to look at that and we will be bringing that back to City Council at the appropriate time," **Hernandez** said.

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Roberto Hernandez
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Savannah Morning News (GA)
 August 31, 2018

\$3.9M Mistake Mucks Up Arena Contract

Author: *Eric Curl*

The Savannah City Council on Thursday delayed by two weeks consideration of an \$11.2 million contract with AECOM Hunt to manage the construction of the new \$140 million arena, after learning the contract amount is actually about \$3.9 million more than city staff had initially reported. The vote for the delay came after staff explained during the morning workshop that a misreading of the fee proposal had led staff to initially report that the contract was \$7.3 million - the amount that was on the meeting agenda until Wednesday. The originally reported amount should have been a red flag since it was so much lower than the amounts submitted by the other two finalists for the contract, said Alderman Bill Durrence. Turner Construction had proposed serving as construction manager at a cost of about \$13.6 million, while JE Dunn's proposed cost amounted to almost \$12.7 million. "I'm very nervous," Durrence said. "I never spent \$140 million before." Pete Shonka, executive director of arena development, said that AECOM Hunt still had the lowest price and highest evaluation score after the error was corrected.

City Manager **Rob Hernandez** also said he felt confident in moving forward with the recommended contractor after determining the company had followed the process correctly, while acknowledging the error should not have occurred in the first place. "That reflects poorly on me and I apologize," **Hernandez** said. "We will double down to prevent circumstances like this in the future." Council members said they wanted more time to see how the error occurred before taking a vote. "The severity of it should not be lost," said Alderman Julian Miller. "We are going to be doing an awful lot of contracts and we need to have confidence on that." Walter Murphy, vice president at JE Dunn, had also spoken out against the contract being awarded to AECOM during the meeting and had informed the council that he had notified the city manager of the issue. "We were told it was a scrivener's error," Murphy said "I don't think so. I think the bid was non-responsive."

In other council news, city council approved the \$14 million sale of two downtown buildings. Mayor Eddie DeLoach joined Aldermen Carol Bell, Durrence, Brian Foster, John Hall and Miller in approving the sale of the historic Gamble Building next to City Hall for \$8.5 million, while Aldermen Van Johnson, Estella Shabazz and Tony Thomas cast the opposing votes. The buyer, Foram Development, plans to convert the building into a condo complex with rooftop gardens. Staff had recommended the sale as a way to rid itself of a building that requires extensive repairs and generate ongoing revenue by putting it back on the tax rolls. But Thomas said he disagreed with staff's assertion that the historic building was not adequate for city use. "I'm a little bit more of a sentimentalist," he said. "I believe the city is giving up its imprint on the riverfront."

The vote was similarly split with the council's approval of the sale of the former Catholic Diocese building at East Broad and Liberty streets for \$5.9 million to Standard Companies, which plans to develop the property as an apartment complex with commercial space. Johnson

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said he was afraid residents were being priced out of living in the city. "This was in my mind a wonderful opportunity to provide affordable and workforce housing for people to live downtown," he said. The approved sales come two weeks after the city council's vote to sell the Broughton Municipal Building to Columbia Ventures for \$4.5 million. The buyer intends to convert the mid-century building into a hotel with retail on the ground level. And in April 2017 the council approved the \$5 million sale of a 1.2 acre lot on Oglethorpe Avenue, where a developer plans to construct a mixed-use residential complex.

Hernandez said the funding from the sales is being invested into a reserve account for a modern municipal center he is considering building west of downtown near the arena to consolidate city departments. The total costs of that project, which would include a public safety complex, have not been determined, **Hernandez** said. "We still have a lot of work to do on that," he said. "We still have to flesh that concept out with city council." In the meantime, the city has been relocating staff into 36,538 square feet of leased office space on Chatham Parkway at an annual cost of about \$785,000.

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Roberto Hernandez
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Savannah Morning News (GA)
 July 11, 2018

City: Funding Problems not Over
Savannah May be Facing Tough Budget Process for 2019, Hernandez Warns
 Author: *Eric Curl*

The recent repeal of the controversial fire fee may have been welcomed by property owners concerned about the additional expense, but city officials are not breathing easy as they look toward Savannah's financial future. With the elimination of the dedicated fee, which would have freed up millions in general funds, the city may be facing a difficult budget process for 2019, according to City Manager **Rob Hernandez**. **Hernandez** warned the Savannah City Council last week that their plan to increase the property tax rate by 0.92 mills, or 7.4 percent, will not resolve long-standing financial challenges that the fee was meant to help address. Almost a third of city parcels pay little or no property taxes due to being exempt or having low value, and tax digest growth has not kept pace with expenses, **Hernandez** said. "I don't want anyone leaving here today with a rosy picture of 2019's budget process," he said. "We are structurally imbalanced."

The mayor and aldermen are expected to adopt the tax increase on July 19 to restore almost \$10 million of the \$16.5 million in revenue lost with the elimination of the fire fee. The city also implemented a hiring freeze and cut expenses, including \$1 million Mayor Eddie DeLoach had sought for an early childhood learning center being planned by the Savannah-Chatham School Board. With the proposed tax increase, the city will be able to preserve funding for some priorities that included software upgrades, enhanced right of way maintenance, Waters Avenue streetscape improvements, increased city reserves, and the Savannah Shines neighborhood revitalization initiative that has already begun in Edgemere/Sackville, said Alderman Julian Miller. "I'm not sure if everyone understands how deplorable the city's computer system is," Miller said. "We're still running programs that most people have abandoned 20 years ago."

Alderman Brian Foster said the city will also maintain the full staffing levels of the police department after adding more than 120 officers to patrol the city following the department's split with Chatham County in February. "We are fully staffed and have been for a while in the first time in over a decade," Foster said. "That's what the public asked for and we have successfully done that." Savannah's property tax rate has been decreased or remained the same every year since 1994, aside from a six-month half-mill increase in 2010 that was dropped back to the previous rate the following year. The current rate of 12.48 mills has been in place since 2013. For the owner of a home with a fair market value of \$150,000, the proposed increase amounts to \$55.20 annually or \$4.60 per month.

Alderman Tony Thomas said that every effort would be made to reduce the rate in 2019, but **Hernandez** responded by casting doubt on that scenario. "I don't know at this point in time because it's still too early in the process for FY19 to determine, in fact, whether we are going to have a smooth budget process or we're going to have a rocky budget process like we've had the last couple years," **Hernandez** said. "So please do not leave here today thinking that budget

process for FY19 is going to be a smooth one because I can't guarantee that." Savannah Alderman Van Johnson suggested that the city meet with residents before the budgeting process begins to reconcile what they want and what the city can afford. "We have a region that takes advantage of many of the services that we provide that they do not pay for," Johnson said. "So I think part of this discussion is educating individuals that we can give everybody what they want, but there is a cost to it." **Hernandez** said that the city's budget director, Melissa Carter, has already proposed holding several citizen engagement panels to walk residents through the budget process, "allowing them to see how difficult it is to put together a \$400 million budget for an enterprise the size of the city of Savannah." The council will hold two additional hearings at 9:45 a.m. and 2 p.m. July 19 before making a final vote on the tax rate increase.

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Roberto Hernandez
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Savannah Morning News (GA)
 June 8, 2018

City to Consider \$11M in Cuts
Council Approves Adding Sunday ‘Brunch Bill’ to November Ballot
 Author: *Eric Curl*

With less than six months left to go, City Manager **Rob Hernandez** has been charged with cutting more than \$11 million from this year's budget. On Thursday, the Savannah City Council directed **Hernandez** to figure out over the next week what cuts can be made to make up for the anticipated loss in revenue, as the mayor and aldermen prepare to reduce the controversial fire fee by more than half in the face of widespread opposition. "We're just asking the city manager to go back and modify the numbers and bring us something forward that people can feel better about," said Mayor Eddie DeLoach. As proposed by the council, a property tax increase is not an option and the city would retain the one mill tax rate decrease that was approved in conjunction with the fire fee as part of the 2018 budget. The council's vote came after DeLoach announced on Wednesday a proposal to reduce the fee by 53 percent, which would bring the fee to \$120 for residential properties. The city is also offering discounts of up to 20 percent until June 15, which would bring the total to \$96. Mayor Pro Tem Carol Bell also suggested that **Hernandez** present an alternative option to cover the costs of eliminating the fire fee entirely. "As a council, let us determine if that's the way we want to go," Bell said. Previous attempts last month by Aldermen Van Johnson, Estella Shabazz and Tony Thomas to repeal or lower the fee were voted down by the remaining members of the city council during deliberations on how to spend \$10 million surplus from last year. On Thursday, Thomas said he was staunchly opposed to the fire fee, but was concerned the council was being unfair to **Hernandez** by not making the \$11 million reduction request when the surplus was presented. "I don't know if the city manager has truly analyzed that plan to see if he could reach that number," Thomas said. "And I don't know either what other options are completely out there." The surplus spending plan, which left the full fire fee intact, included funding to pay off the purchase of the Coastal Empire Fair site; complete the Cultural Arts Center; install computer security upgrades following a malware attack; fund a staff compensation study; and assist the Savannah-Chatham School Board in establishing an early learning center touted by DeLoach as an anti-poverty initiative.

Hernandez said Thursday he did not recommend using the surplus funds to make up fire fee cuts because the savings and unexpected revenue from 2017 were going toward one-time expenses and that the fire fee was meant to free up general funds for ongoing operational costs. "It would come back to bite us at some point in the future," he said. The proposed budget cuts are expected to be presented for the council's consideration during a budget workshop June 18. The tax rate has to be formally adopted by the end of the month and the council is expected to vote on the revised budget at their meeting June 21. Prior to the regular meeting, the council got a briefing on a hardship program the city is developing for low-income property owners who are unable to afford the fee. The city is now seeking a nonprofit social service provider to administer the program so applicants can also have an opportunity to get assistance with additional needs, said Tafanye Young, Chief Community Services Officer. "We're hoping that people will take advantage of this and see rewards beyond just the fire fee being waived," Young said.

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Savannah Morning News (GA)
 April 12, 2018

The Sense in the City's Spare Cents

Author: *Eric Curl*

Savannah had a better year, financially, than expected, according to city officials. Now, the city is planning on providing \$2 million in funding needed to complete the new Cultural Arts Center, paying for security upgrades following a recent computer malware attack, and covering the full costs of a 3-percent performance-based pay increases for employees, after recently closing out the 2017 budget with a \$10 million surplus. The surplus stemmed from a combination of about \$5.2 million in revenue coming in higher than anticipated, in addition to expenses coming in about \$4.7 million below budgeted amounts after the city implemented a hiring freeze last year, said City Manager **Rob Hernandez**.

Most of the growth was from elastic revenues, such as lodging and sales taxes, that expand and contract with strength of economy, **Hernandez** said. "We have a general idea how the economy is going to perform but it's a guess and science at the same time," he said. "So in 2018 our budgeting numbers are a bit more optimistic than they were when we put together the '17 budget, but something could happen tomorrow." The funding plan going before the Savannah City Council Thursday will also increase reserve funds, pay a debt owed for purchasing the Coastal Empire Fairgrounds site, and cover costs associated with converting a section of Montgomery Street for two-way traffic. In addition, staff is recommending that the revenue go towards staff relocation costs related to the planned sale of two downtown buildings and a compensation study to address pay inequities.

"We also did a reorganization this year and created new job titles," **Hernandez** said. "We think we slotted them in the right place, but it's time that we do a real in-depth review of our pay and compensation practices." Almost 100 positions were eliminated as part of the reorganization, with about 40 of them vacant, but dozens of new positions were added and impacted employees were given the opportunity to apply for the jobs. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position.

Hernandez said the surplus does not negate the need for the city's new fire services fee, which was implemented to correct a structural imbalance the city has faced for years. "If we didn't have the hiring freeze and agencies spent every dime we got budgeted, we would have only \$5.2 million in extra revenue," he said. "The fire fee provides us an opportunity to take \$21 million of pressure off of the general fund." The city council recently approved an ordinance that offers up to a 20 percent discount on the fee for installing safety equipment, developing emergency plans and participating in fire training programs. Property have between April 15 and June 1 to apply for the reduction before bills are sent out in the fall.

Meanwhile, the city also plans to spend about \$500,000 on new technology and services to boost

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security measures after a malware attack discovered in February impacted some city services. The malware appears to have been eliminated, but the city is still not accepting email attachments as a precaution, said city spokesperson Michelle Gavin. "We think that we've gotten it," Gavin said. "We've taken all the measures to wipe computers and have taken some extreme measures, but it's an ongoing thing."

Proposed surplus expenditures

Transfer to Reserves/General Fund Balance: \$2.5 million

Performance-based 1-percent employee pay increase: \$600,000

Cultural Arts Center Overrun: \$2 million

Montgomery Street redirection project: \$1 million

MPO agreement amendment: \$200,000

Revenue dept. relocation: \$500,000

Fairgrounds - Pay off Debt Service: \$1.4 million

IT/Malware Equipment Recovery: \$500,000

Relocation Contingency: \$100,000

Compensation study: \$300,000

Facility repairs and improvements: \$800,000

Rental of backhoe - Cemeteries: \$100,000

Total: \$10 million

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Roberto Hernandez
(Articles are in reverse chronological order)

Savannah Morning News (GA)
 February 18, 2018

Savannah Restructures Government Operations
Officials Tout Plan as Way to Make City Operations More Efficient
 Author: *Eric Curl*

New titles and responsibilities, along with salary increases in some cases, have been issued to a number of Savannah's department heads and top administrators as part of a government reorganization implemented by City Manager **Rob Hernandez**. Touted as a way to make city operations more efficient and achieve the Savannah City Council's priorities in a recently adopted strategic plan, new departments and positions have also been created, while others have been eliminated or modified. The restructuring consolidates two assistant city manager positions, one deputy to the assistant city manager position and five bureau chief positions into three executive officers. The employees selected for the new positions have the experience and personality to lead and get things done, **Hernandez** said. "That's what differentiates managers from leaders," he said. "I need leaders more than I need managers."

Paying for quality

Marty Johnston, formerly a deputy assistant to the city manager, was selected to fill the chief operating officer position, charged with asset management, customer service, special events coordination and oversight of the financial and internal service functions of the city. The move bumps her salary up from \$125,827 to \$148,000. Heath Lloyd was selected as Chief Infrastructure and Development Officer, after previously working as the public works and water resources operations director. Lloyd's responsibilities include ensuring the safety of the city's infrastructure, producing safe drinking water, protecting buildings and streets from flooding, and improving the development process. Lloyd's new salary amounts to \$148,000, up from his previous salary of \$109,414. Taffanye Young was hired as the city's Chief Community Services Officer after previously serving as the Community and Economic Development Bureau chief. Young is charged with unifying initiatives and programs focused on improving the lives of residents and providing them with clean, safe neighborhoods and access to quality housing, recreational facilities, leisure opportunities and supportive services. Her salary increased from \$132,282 to \$148,000.

The city's former budget director, Melissa Carter, also received a pay increase from \$89,400 to \$115,000 after being promoted to head the new Office of Management and Budget, which is responsible for preparing the city's yearly and long-term fiscal plans, as well as taking on an expanded role in grants development. And David Keating, who previously worked as a real property director, had his salary increased from \$84,025 to \$90,327 after being put in charge of a revamped Real Estate Services Department that now oversees property acquisitions, facilities maintenance, cemeteries, and the Civic Center. Pay was only increased for employees who have taken on additional responsibilities so that they are being fairly compensated, **Hernandez** said. "We want to keep the good ones," he said. "And also we have key positions we have to fill and we need to be able to compete and attract a quality workforce." Cutting grass and dysfunction After years of complaints about property maintenance issues and delays in completing planned

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Roberto Hernandez
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projects, departments that never talked to one another were merged and new offices were launched as a way to eliminate government bureaucracy and improve focus, according to officials. To improve property maintenance, quality of life and tourism impacts, a new Code Compliance department was created. Previously, code-related activities were handled by multiple departments, prompting situations in which a property maintenance enforcement officer could not handle a zoning violation, or vice versa. In addition, property maintenance was only citing code violations on residential properties and letting violations on commercial properties go or referring them to the building department, **Hernandez** said. "So we said time out ... we're bringing all that in house," he said. "We're going to do cross-training and we're going to have commonality in how our code enforcement is handled and prosecuted."

Kevin Milton, a new employee with the city, has been hired as director of the department, with a salary of \$115,000. Former Property Maintenance Director Kimberly Corbin is now working as Code Compliance Assistant Director, with her salary remaining at \$80,368. Similar issues led to the consolidation of the city's landscape maintenance functions, including squares and monuments, into a new Greenscapes department. Prior to the consolidation, **Hernandez** said one team would cut an overgrown lot and then a different unit would come back a week later and cut the adjacent canal bank. And in some cases, **Hernandez** said, small equipment such as weed wackers would not be brought in until days after the larger mowers had cut down some city right-of-way. Now, work areas have been divided into grids that are maintained by regional teams responsible for basically anything that grows, **Hernandez** said. "They work a grid and don't leave that grid until everything is finished," he said.

Former Park & Tree Director Gordon Denney now heads the new department. His salary remains \$80,368. The reorganization also included the formation of the Capital Projects Management office, which **Hernandez** said put five full-time positions in charge of overseeing \$726 million in budgeted projects. That move was praised by Alderman Julian Miller recently when the council was given an update on the projects being funded by the voter-approved special purpose local option sales tax. Often-repeated concerns were raised about the time it has taken to complete some projects, and Miller noted that the department was created to address the issue. "This is one of those things going on behind the scenes that the public won't see that is really going to make a big difference," Miller said.

Staffing impacts

The restructuring came after the city imposed a hiring freeze upon **Hernandez's** arrival in October 2016, and at his direction only critical positions were filled for more than a year in anticipation of the changes. Almost 100 positions ended up being eliminated as part of the process, with about 40 of those vacant. Dozens of new positions were added, however, and impacted employees were given the opportunity to apply for those jobs. "In certain instances we were very lean in operations, and I think that was hurting us," **Hernandez** said. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position, **Hernandez** said.

Not all employees' pay went up after getting a new position. One former assistant city manager,

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Roberto Hernandez
(Articles are in reverse chronological order)

Peter Shonka, ended up having his pay reduced by \$15,624 to \$140,619 after he became head of a new arena development district office - the office focused exclusively on developing the new arena and stimulating private and public investment in the surrounding redevelopment area. Such pay reductions were unfortunate, but in some cases could not be avoided, **Hernandez** said. "There may have been several, although not widespread, due to reduction in responsibilities," he said. A number of other staffers retained the same salary, while taking on new roles. Bridget Lidy, former Tourism and Ambassadorship director, was hired as the new Planning and Urban Design director after her department was eliminated. Her salary remains \$85,703.

And Bret Bell, newly titled assistant to the city manager rather than deputy assistant, is now charged with handling legislative priorities, preparing the council's agenda, and working to ensure residents' concerns brought to the attention of aldermen are addressed. His salary remains \$107,205. In addition, former Economic Development Department Director Manuel Dominguez's salary of \$80,368 was left unchanged after he became head of what is now the Office of Business Opportunity, which is responsible for administering and coordinating the city's economic and small business development program. After being delayed for about two months as they attempted to find suitable jobs for all of the impacted employees, the reorganization became effective Feb. 1, said **Hernandez**, whose salary remains \$238,000. "One thing I want to stress to folks is patience," he said. "We just put this new organizational alignment into play."

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Roberto Hernandez
(Articles are in reverse chronological order)

Savannah Morning News (GA)
 December 30, 2017

City Manager Talks ‘Funkification,’ Ferris Wheels in Savannah
Opinions Expressed on Preserving Historic Structures Modernizing Others

Author: *Eric Curl*

A modern looking arena could be in play, but a proposed Ferris wheel on River Street is out of bounds. City Manager **Rob Hernandez** recently shared his thoughts on architecture, historic preservation and development in Savannah, as the guest speaker at the Historic District Board of Review's recent retreat. During the hour-long discussion earlier this month, **Hernandez** also took time to describe one of his architectural "pet peeves." "I hate red brick," **Hernandez** said. "We seem to have this tremendous love affair with red brick." He said he would like the new arena the city plans to build west of the Historic District to have a more modern look, perhaps with stainless steel and glass, while still paying homage to history. "But it doesn't have to be rooted in red brick," he said.

The arena site is outside the board's jurisdiction, but Chairman Stephen Merriman Jr. later said he is not necessarily opposed to a more modern looking building being built at the site. "I would be more opposed to build an arena that appears like it was built in the 1850s," Merriman said. "It gives a false sense of history." **Hernandez** also made it clear that he believes City Hall is no longer an efficient place for himself and other city staffers to work or for the Savannah City Council to hold their meetings. He talked about his plan to build a modern municipal complex in order to consolidate the city's workforce, while possibly converting City Hall into a "working museum" where the mayor and aldermen could have offices. "We're going to preserve City Hall," **Hernandez** said. "We have to preserve it, but the day-to-day stuff can go somewhere else." The 111-year-old building is in serious need of repairs, and funds for the structure's restoration will need to be raised, possibly by including the project in the 2019 special purpose local option sales tax referendum, he said.

Hernandez got some pushback from board members when he said he was considering replacing City Hall's deteriorating wooden windows with modern faux-wood frames to make them more efficient and hurricane-resistant. Board members were concerned the move would ruin the building's historic integrity and lead to private developers also wanting to bypass ordinance requirements. They suggested the city install exterior wood windows with interior storm windows to achieve the results he is seeking. Otherwise, the historic protections in place would crumble, Merriman said. "That's one of the biggest things Savannah has going for it, is our ordinance," he said. There are some buildings that seem ripe for "funkification," such as the old East Side Theater on the corner of East Broad and East Gwinnett streets, **Hernandez** said.

The historic theater with the words "Hungry World" across the old marquee has sat vacant for decades. "Not to be disrespectful of its character, but you can do cool things with it," **Hernandez** said. "That building has a lot of potential." In a similar vein, he would like to "funkify" Martin Luther King Jr. Boulevard around the Interstate 16 flyover, which he considers an eyesore. There have been plans proposed to demolish the ramp into downtown, but **Hernandez** said he does not

Internet – Newspaper Archives Searches**Roberto Hernandez***(Articles are in reverse chronological order)*

see the structure going anywhere anytime soon. But the city is too busy trying to put out daily fires and has little time to be creative, **Hernandez** said. "You're the folks that need to come up with those ideas and we'll support it when we can," he said. **Hernandez** also made it clear that some proposals will not fly as the city tries to balance the demands of tourism with preservation efforts and residential needs. Board members thanked him after **Hernandez** said he and the city council recently rejected a request to install a Ferris wheel on River Street.

The 137-foot-tall observation wheel would have been installed on a city parking lot along the water between the Abercorn and Lincoln street ramps at an initial rate of \$17,000 a month, under the lease agreement proposed by Missouri-based SkyStar Wheel. "When I looked at that request, I said no way," **Hernandez** said. **Hernandez**, who previously worked as the deputy county administrator of Broward County, Fla., became Savannah's city manager in October 2016.

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Roberto Hernandez
(Articles are in reverse chronological order)

Savannah Morning News (GA)
 December 1, 2017

City Considers Budget Cuts, Fees to Cover its Shortfall
Hernandez: \$187 Million Proposal a Starting Point
 Author: *Eric Curl*

Savannah staffers are proposing a variety of revenue generating options and expense cuts for the 2018 budget to determine whether the Savannah City Council wants to implement service enhancements or reductions in the face of projected funding shortfalls. The preliminary spending plan presented during the first day of a two-day budget retreat on Thursday amounts to a "bare bones, no frills and somewhat painful" general fund budget of \$187 million that includes almost \$13 million in cuts to personnel, services and capital project investment, said City Manager **Rob Hernandez**. "It's not even a recommended budget or a proposed budget," **Hernandez** said. "It's just a starting point for our conversation."

The second budget option of almost \$200 million would sustain existing services, as well provide funding for performance-based wage increases and increase reserve funds for unforeseen expenses. The third spending plan would be an "enhanced budget" of about \$213 million to cover expenses related to council priorities, such as additional police officers recommended by a consultant to improve emergency response times. Among the funding options staff presented was a proposed fee charged to all properties to cover the cost of fire department services and eliminate that department's dependence on tax revenue. Implementing a fee to cover the full cost of fire services would amount to \$370 per household and raise an estimated \$31.5 million, according to the budget report.

A consultant, Ecological Planning Group, also presented reduced rates as an option that would cover between 50 percent and 75 percent of fire service costs and raise about \$15.7 million to \$23.6 million. Property tax increases and decreases of between half a mill and two mills were also proposed, with revenue impacts ranging between \$2.5 million and \$10 million. "Anything you decide today for this budget is going to play out and have an effect for the next few years," said Erick van Malssen, who was working with the fire fee consultant. A hardship fund to assist low-income property owners is now being considered as part of the fire fee proposal, if it is adopted.

Savannah Alderman Van Johnson said he is still concerned about the fee's impact since renters would not be eligible to receive payments from the fund, even if the fee's cost was passed onto them by landlords. But Alderman Julian Miller said rental rates are established by the market and he does not expect tenants to be adversely affected as a result of the fee. Alderman Tony Thomas said renters would be impacted, but that the more than 5,800 tax-exempt property owners benefiting from fire services need to contribute to those costs. "Those folks have got to participate," Thomas said. "It's going to be tough for some people, but some people have been riding this system for decades."

The \$12.7 million in spending cuts are being proposed, despite projected increases in property

tax revenue and other tax revenue streams this year and next. The shortfall is due to a combination of factors, including an increase of tax exemptions, operating costs and growing debt payments related to property purchases, infrastructure improvements and public safety purchases, **Hernandez** said. "We have a lot of needs in the city that far exceed the revenues available to us," he said. A surplus of about \$3.8 million is actually anticipated for 2017, due to higher than projected tax growth and salary savings from a hiring freeze. Those funds are proposed to be used to offset a budgeted use of reserve funds for 2017 and help cover expenses related to hurricane damages and capital project overruns.

The city is also anticipating some employee payouts due to some officers joining the county police department, following the split of Savannah-Chatham police. Planned civilian staff cuts stemming from a government restructuring should only result in a "handful" of employees actually leaving the organization since those impacted will have the opportunity to fill other positions, **Hernandez** said. The second day of the budget retreat is scheduled to begin at 8:30 a.m. Friday. During the workshop staff will need the council to make a decision on what type of funding options or cuts they want to move ahead with, **Hernandez** said. "I have to get some clarification on what they want to do because I have to put together a final budget," he said.

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Roberto Hernandez
(Articles are in reverse chronological order)

Savannah Now – Savannah Morning News (GA)
 February 11, 2017

Poverty Persists in Savannah, Despite City Programs

Author: *Eric Curl*

Austin Spell, 20, wants to be a pipe-fitter or EMT. That is why he was recently sitting in a classroom at the Moses Jackson Advancement Center, where he and six others were registering for a GED program put on by Savannah Tech. Spell said he was pulled out of school by his stepfather in eighth grade and he does not have the educational background he needs to meet his career goals. “I’m planning on getting my bachelor’s degree and see what I can make out of myself,” he said. The GED program is one of many programs at the city-supported advancement center that are meant to help Savannah residents find employment. Still, Savannah’s high poverty level persists. The percentage of Savannah’s population living below the poverty level was almost 27 percent in 2015 — up from almost 22 percent in 2000, according to the US Census Bureau’s American Community Survey. The increase occurred as the city invested \$2.7 million in general funds in anti-poverty programs between 2011 and 2016, including \$642,600 to support the advancement center, according to a recent report presented by city staffers. During that time, another \$1.1 million was spent supporting Step Up Savannah’s job training and anti-poverty initiatives, and \$981,304 went toward various social service agencies.

About a million dollars in federal funds supported the advancement center and social services offered by America’s Second Harvest of Coastal Georgia, Union Mission and Lutheran Services of Coastal Georgia. Taffanye Young, Community and Economic Development Bureau chief, recently attributed the increased poverty rate to the recession when she presented the report to the Savannah City Council during an economic mobility workshop. “You had a lot of jobs that were lost,” Young said. “A lot of people with higher incomes and higher skills ended up taking some of the lower skilled jobs.” And job training is no “magic bullet” when residents have child care, transportation, substance abuse and criminal background issues to deal with, Young said. Only 17 percent of the 507 individuals who received job training through the city-funded programs since 2011 ended up becoming employed, according to the staff report. Those type of results are not satisfactory, City Manager **Rob Hernandez** told the council. “We may have to do something entirely different with some of these populations that have drastic barriers,” **Hernandez** said.

Hospitality programs

Other programs have fared better, however. The US Department of Labor’s Workforce Innovation and Opportunity Act only employed 34 percent of the 1,256 Chatham County participants since 2011, although many of those participants are still engaged in the program, according to the staff report. And since 2014, 316 adults received job training through the Step Up’s Chatham Apprentice Program, with 59 percent becoming employed. Another 159 jobs have been created or retained since 2011 for low- to moderate-income residents through a city-supported loan program administered by the Small Business Assistance Corporation. Goodwill of Southeast Georgia is helping residents find work with the launch this year of a hospitality training program at the advancement center. Rashena Platt, one of the six-week program’s

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participants, said that after three months of being unemployed, the program helped “get her foot in the door” and find a job as a housekeeper.

Whether hospitality-based jobs will help Savannah reduce the poverty rate has been a matter of local debate. The growing number of hotels has drawn some criticism from residents, who are concerned about the city becoming too dependent on what they contend are low paying jobs. But Borish Jenkins, a Goodwill Career Center assistant who conducts the training course, said the hospitality industry does offer opportunities for advancement and better pay. Hotel employees, for instance, can start as a housekeeper, go to front desk, then become a supervisor and from supervisor become a general manager, said Jenkins, a former hotel employee himself. “I know it can be lucrative,” he said. And some hotels, such as developer Richard Kessler’s Plant Riverside \$270 million hotel project being built along West River Street, are going to be offering higher pay, Jenkins said.

The Plant Riverside project is located in a state opportunity zone, which makes Kessler eligible for job tax credits for providing employment in an impoverished area. The hotel is supposed to create 700 full-time permanent positions with benefits, including health insurance, and Kessler is required to pay at least \$10.25 as part of the tax credit agreement, but he has said beginning wages could reach as high as \$15 an hour. As for Platt’s plans, she said she plans on working her way up to be a manager. “You always have an opportunity for advancement,” she said. “So just take your time and move up.”

‘Outside the box’

City staffers said that they plan on improving coordination among service providers, identify new revenue sources, aggressively promote programs, and think “outside the box” to reduce the poverty rate and provide more employment opportunities. Young said that the city may want to try to re-implement a partnership with a local church that had retirees provide training, such as brick laying, for residents seeking job skills. Staff is also working on a proposal that will hopefully address some of the hard to hire issues with respect to city contracts and city employment, **Hernandez** said.

<https://www.wsav.com/news/savannahs-city-manager-on-his-first-3-weeks/>

Nov 9, 2016

Savannah's City Manager on His First 3 Weeks

by: Andrew Davis

He was the choice of the council to lead the city of Savannah. In just three weeks on the job, City Manager **Rob Hernandez** has already been through a hurricane and multiple murders. But what does Savannah's City Manager think the next three weeks, months, even years may hold.

"Making decisions without having all the appropriate facts or knowing all the different facets of the community that could be dangerous," said **Hernandez**. That's why **Rob Hernandez** says he is in "listen, learn and observe" mode. Observing the community he now helps shape.

Shaping with a community and a staff he has already seen deal with a hurricane, and thrive under pressure. "The reverse would be that i'm here 6 months or a year and we would have a crisis and what would be going through my mind would be, well i don't know who I would rely on, I don't know how this team is going to perform, I now know that," explained the City Manager. He also knows is that crime in Savannah is a problem. "The community is very concerned about it, the community expects us to take proactive measures and we have," said **Hernandez**.

But the same community also may be too focused on each and every criminal act. "When we have an instance of crime that happens here its unfortunate," explains **Hernandez**. "But it stands out more i think in the community mindset because its out there its closer to them it gets publicized more in the city of Savannah." But he is not ready to rubber stamp the high cost of putting more officers on the streets. Stressing Fiscal responsibility, he hopes to find "progressive" ways to get police what they want in 2017. "My job is to balance all the competing needs in the community and to try to make a fiscally sound and operationally sound recommendation to the nine that eventually have to make the decisions," explained the City Manager.

The decisions about growth of our city is foremost on **Hernandez's** mind. "We cant afford to be as methodical as we have been in the past again because the world is moving at a breakneck speed, and we have to keep up with the world," said **Hernandez**. "Are we behind?" "I'm not saying we are behind. But we have to pick up the pace." Pace of life, and pace of drawing businesses to Savannah. "Make sure they know Savannah more than just a great place to visit. A great place to relocate your business," said **Hernandez**. "Oh and by the way they have a really great local government as well."

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Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel
SEP 21, 2016

Deputy Broward administrator leaving for Savannah

By Brittany Wallman

The No. 2 official in Broward County government has resigned, after accepting a job in Georgia. Roberto "Rob" **Hernandez**, deputy county administrator, said in a letter to County Administrator Bertha Henry earlier this month that it was with "great sorrow" he submits his resignation.

Hernandez was responsible for a large portion of county government, and also brokered the deal with the Florida Panthers that increased the hockey club's public subsidy but helped ensure the team would stay. In a handwritten note on the resignation letter, he thanked Henry for mentoring him, and giving him "the tough tasks to take on, like the arena."

Besides the deputy position, Henry has two assistant county administrators, Monica Cepero and Alphonso Jefferson, and two assistants to the county administrator, Gretchen Cassini and Alan Cohen.

Hernandez has been the deputy in Coral Springs and in Atlanta's Fulton County. But he said his professional goal was to be in the top position. "I'm not getting any younger and the years are just flying by, so this was the right time and the right community," the 50-year-old **Hernandez** said in an email recently. "I did not want to take any city manager or county manager job just for the sake of it, unless the community was right. Savannah is a nice town with lots of positive attributes and challenges, too." **Hernandez's** resignation is effective Oct. 9.

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Roberto Hernandez
(Articles are in reverse chronological order)

WTOC 11 (GA)
 August 11, 2016

City of Savannah Names Roberto Hernandez as Sole Finalist for City Manager

Author: *Sean Evans*

The City of Savannah held a news conference on Thursday to discuss updates in the search for the new city manager. After a nationwide search, and in a unanimous consensus and recommendation, **Roberto Hernandez**, deputy county administrator of Broward County, Florida, has been named the sole finalist for the position of City Manager of Savannah. Choosing **Hernandez** was a unanimous decision by city council members, and **Hernandez** has accepted the offer pending contractual negotiations according to Mayor Eddie DeLoach. DeLoach said **Hernandez's** hands-on approach, experience in government and energy are some of the qualities that separated him from the other candidates.

According to the Broward County Government website:

Hernandez is an ICMA-Credentialed Manager with more than twenty years of progressive and responsible local government management experience. He re-joined Broward County in July 2013 as Deputy County Administrator. Previously, he served as Deputy City Manager for the City of Coral Springs overseeing various city functions as well as the city's community redevelopment agency. Prior to Coral Springs, he served as Deputy County Manager for Fulton County, Ga., where he oversaw public safety agencies, unincorporated area services, the Office of the Child Attorney, offender reentry program, and coordinated with the County's constitutional and judicial agencies. He previously served Broward County in a variety of capacities from 1994 through 2008, including serving as an Assistant to the County Administrator from November 2003 to June 2008. **Rob** retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

Hernandez was a finalist for two other jobs previously. He was a finalist for the El Paso County, TX County Administrator position earlier this year, and was a finalist for the Delray Beach City Manager position in 2014. **Hernandez** talked about the advantages the region presents, with the ports, travel opportunities with Savannah-Hilton Head International Airport and the proximity to the beach and overall rich history, as well as the military presence. "I was very impressed by the passion from the city council in terms of what they see happening in the city over time, and their strong dedication to the community. That really, that really sold me," said **Hernandez**. While in Fulton County, **Hernandez** oversaw multiple departments including police, fire and rescue and also served as the county manager's liaison with judicial agencies.

Mayor DeLoach says he believes **Hernandez** could come in and start working right away with the police department and judicial services in Savannah to address crime. Alderwoman Carol Bell says she was impressed with how much **Mr. Hernandez** knew about the city and its operations already. So WTOC asked the front-runner what he's observed so far and hopes to achieve as the next city manager. "The need for continued re-investment in certain communities, a progressive strategy for bringing new investment for the community, for growing jobs. For

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fixing and updating the condition of the infrastructure. Those are the things that everybody goes through, it's very common. But that's certainly something that I'm going to have to tackle once I get there," said **Hernandez**. Savannah City Council members met on Wednesday to hear from the search committee about where they are on the final candidates up for the position. The council and search committee then met behind closed doors in an executive session.

Current City Manager Stephanie Cutter announced her retirement at the beginning of the year, setting into motion a nationwide search for her replacement. So, what exactly was the city looking for when they put out the posting for a new city manager? It's an important question given that at least the last two city managers were not what the respective city councils eventually wanted in the role. First of all, for those who forgot or perhaps never knew, ours is a Council/City manager form of government. Meaning while the council appoints a city manager, the city manager runs the city and some might argue, the city council itself.

First and foremost council was looking for a person who had worked with and understood the challenges of a diverse community, not just racially but economically. Someone who could bring new ideas for breaking the cycle of poverty among those living in certain neglected parts of Savannah. And, of course, someone who bring new ideas to the table when it comes to fighting violent crime, in particular, gun violence. Here's an interesting role they want this person to fill: possible ax-man. Council, at least the newest members, want this new city manager to review city government top to bottom and start cutting if Savannah's City Hall has gotten too big, and taxpayers are paying too much for something that could be done with fewer people and resources.

For filling this role, our new city manager will receive the city's benefits package and a salary between \$210,000 and \$300,000. That's yet to be negotiated if **Roberto Hernandez** is our man. We mention briefly where this candidate has been and what positions he's held in the past. You may be thinking of all his deputy roles that this guy has always been the groomsman and never the groom. And **Hernandez** anticipated that issue in his actual resume' saying, "...I've resisted the temptation to 'chase' city manager positions solely for the sake of becoming a city manager at any cost. Instead, I've judiciously and patiently served in deputy roles in great organizations and exceptional communities."

Hernandez considers himself a pretty simply, straight-forward guy. He says his management style is fluid. It adapts to the specific situation. Not that we're looking yet, but **Hernandez** will tell you he is clean. This is what he told recruiters before tossing his hat in the ring: "...There is 'no dirt' on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night." We will continue to follow those negotiations and let you know exactly what the city decides when it comes to salary, contract length, start time and other allowances.

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Roberto Hernandez
(Articles are in reverse chronological order)

Tribune Content Agency News Service (USA)
 May 20, 2016

Is Broward ready for a hurricane hit? Drill shows how rescue would work

Author: *David Fleshler*

May 20--After raking the Florida Keys and Miami-Dade County, Hurricane Kimo reached Miramar as a lethal Category 3 storm, with sustained winds of 129 mph, and tore a diagonal corridor to Deerfield Beach. The slow-moving storm bore into the county for seven hours. A tornado struck Pembroke Pines, Cooper City, Davie and Fort Lauderdale. An eight-foot storm surge trapped people on barrier islands. With cell towers damaged, many smart phones became useless. This was the scenario Thursday as Broward County conducted a full-scale hurricane drill at the Emergency Operations Center in Plantation to prepare for the June 1 opening of hurricane season. About 300 people gathered on the operations center's vast open second floor to practice receiving calls for help, coordinating responses and dealing with the countless challenges of a natural disaster.

"We've got to get it right the first time," **Rob Hernandez**, deputy county administrator, told the group. "The public expects that we'll get it right the first time. We can't offer them excuses. There are no alibis, there are no mulligans." The scenario began seven hours after the all-clear, as the county lay damaged, darkened by power outages and full of a untold crises, with fatalities reported, residents trapped by floodwaters and many situations requiring immediate attention. Like much of contemporary life, the response to the crisis would be coordinated largely through a computer software program, in this case WebEOC 8.0, a crisis-management system developed by Intermedix Corp. of Fort Lauderdale.

As calls for help and reports of problems such as power outages came in, it was up to those in the room to route them to the right agency or issue the correct orders to deal with them. The group included representatives of law enforcement agencies, fire departments, the county government, Florida Power & Light Co., city governments, the Red Cross and many other organizations. A call to rescue four people trapped on a roof in Oakland Park was routed to the Broward Sheriff's Office, said Major Kevin Shults, who headed the Sheriff's Office group at the emergency operations center. But the law enforcement agency's helicopters didn't have the sort of basket-and-line system required for such an endeavor. They asked the Coast Guard to do it instead. A call for water came from Pompano Beach, where the storm damaged the treatment plant, reducing its output by half. Alan Garcia, director of the county's division of water and wastewater services, ordered emergency interconnects from a county water plant that would temporarily provide the city with sufficient water.

In the pressroom, public communications specialist Cindy Malin scrawled occasional updates on a white board: "Flooding and tornado damage throughout county. Exact location TBD." "Drones being used to assess damage." As the various reports, crises and calls for help came in, evaluators in green vests observed the work in each area. They will prepare written reports. The Red Cross, which operates shelters, faced a crisis when 2,500 people showed up at a Coconut Creek shelter that was already full. The issue was "escalated" to a high-ranking group of

Internet – Newspaper Archives Searches**Roberto Hernandez*****(Articles are in reverse chronological order)***

decision-makers, who authorized the opening of an additional shelter. "The exercise is to test our abilities to collaborate, communicate and respond," said Roberto Baltodano, the Red Cross' regional communications manager. "These are things that could happen during a real hurricane. We've had these hurricane scenarios." The county has not seen a direct hit from a hurricane since Wilma in 2005. "It's been 11 years since we had one," County Mayor Marty Kiar said to the group before the drill began. "Hopefully this will be another year that we're hurricane-free. But eventually we're going to get hit."

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Roberto Hernandez
(Articles are in reverse chronological order)

South Florida Sun Sentinel (FL)
 Dec 8, 2015

Deal helps Panthers, helps Broward more

The Broward County Commission should approve a new agreement today with the Florida Panthers because the deal would better protect the public's investment in the BB&T Center. One can argue persuasively the county was wrong to make that investment of tourist tax revenue 20 years ago, when the Panthers wanted out of the old Miami Arena. A National Hockey League team draws fewer tourists than Broward's beaches and the convention center. The county, however, can't back out of that commitment. With that in mind, county administrators make their more persuasive case for the front-loaded \$86 million deal that would run through 2028.

One argument against the deal is the public shouldn't subsidize the rich owners of the Panthers. Deputy County Administrator **Roberto Hernandez** responds that the money -- none of it property tax revenue -- would go toward the arena, not the Panthers. The team owners also run the company that manages the BB&T Center. They would have to spend the \$86 million on improving, operating and promoting the arena, of which the team is the main tenant. The county would have to sign off on the improvements. The team also would continue to pay \$5.3 million per year toward the arena's debt, which will be paid off in 2028. So the county's investment would go to the county's facility.

The other main argument against the deal is the county should spend the money on projects that better play to Broward's tourism strengths -- such as beaches. Two other key priorities are an expanded convention center and a convention center hotel. The arena is far from the county's major tourism hubs. **Hernandez** acknowledged, "We are very sensitive to that." He believes, however, the county can "meet all of our obligations" regarding tourism promotion, especially beach renourishment. County officials, **Hernandez** said, routinely have made conservative estimates of 3 percent for increases in tourist tax revenue. In fact, annual increases have been more like 5 percent.

The county has put much of that balance in reserve, **Hernandez** said. A recent study of the tourist tax questioned the amount of money held in reserve. Doing so, **Hernandez** said, means the county can use that money for one-time projects like beach renourishment and still pay the recurring expenses of the Panthers deal. Part of this story is the coming debate over raising the tourist tax from 5 percent to 6 percent, even though none of that potential revenue is part of the Panthers deal. It is generally agreed money from the sixth cent would go toward convention center expansion.

Hernandez said the county is waiting for bids on the expansion. When administrators have an idea of the cost, the county will start discussions on raising the tax. Miami-Dade and Palm Beach counties have raised their tourist taxes to 6 percent. +The deal would cut the county in for a share of profits if the money-losing Panthers became big winners on the ice and financially. The arena would have a better chance of getting an all-star game, and the team would continue to help youth hockey in Broward. All are nice points, but the focus of the deal, correctly, would remain

on the BB&T Center. The healthier it is, the better for the county. Losing the Panthers would mean losing 40 dates, and the BB&T Center has lots of regional competitors. So the arena is healthier with the Panthers, and with the team having a better chance to succeed.

Having studied the financials, **Hernandez** said, "We came to the conclusion that it would cost the county almost as much if the team stayed as if the team left. It's almost an economic wash. So if we would pay with or without them, it's better to have them." The deal would allow the Panthers to leave after eight years, but the team would have to repay the \$72 million in tourist tax revenue it had received. If the team left after eight years, the county would have enough money to repay the arena debt. As long as the Panthers stay, **Hernandez** said, "We transfer a lot of the responsibility to the team." The county also would get development rights to land around the arena. One other point in the deal is worth noting. Two decades ago, the county committed to spending two cents of tourist tax revenue on the arena. The county hasn't met that obligation. Under the deal, **Hernandez** said, the Panthers would drop all claims to any unspent money. There might be emotional reasons to reject the Panthers deal. There are better business reasons to approve it.

Capital Gazette (PA)

March 3, 2015

Broward Commission Brainstorms Ways to Help Struggling Center Pocket of CountyAuthor: *Brittany Wallman*

In the heart of Broward County is a zone of economic depression that even the most dramatic real estate boom didn't lift out of poverty. The unincorporated neighborhoods in the 33311 zip code — roughly between Interstate 95 and U.S. 441, north of Broward Boulevard — were left behind by the cities around them. No city will take them. County commissioners are their only local government. Commissioners met Tuesday to talk about the central county community — four mostly African-American neighborhoods of about 7,000 people — and agree on a host of small efforts to help. Only \$4.8 million is allotted for economic development there — a sliver of the county's overall \$4.1 billion budget. County Commissioner Dale Holness, the area's only direct local representative, said it's the first economic development money the county has spent there since the 1980s. About \$30 million has been spent on improvements of roadways, bus shelters, drainage and the like. The moves commissioners endorsed Tuesday are hardly dramatic: Relocating a Boys and Girls Club to Delevoe Park, continuing building homes on 144 lots the county owns, working with small businesses to improve properties by offering loans or grants, giving a makeover to some of the roadways, improving parks, and banking land for future redevelopment. No one promised an immediate turnaround. "It doesn't happen overnight," county Economic Development Director Sandy-Michael McDonald warned. But county leaders said they support a renewed focus. "I'm glad to see we're moving forward with some planning," Holness said, "because the community desperately needs it." While the rest of Broward enjoys a rebound from the Great Recession, with three years now of positive economic growth, the central county zone remains stagnant. "These communities look to us to guide them along the way to economic prosperity in their neighborhoods," Deputy County Administrator **Rob Hernandez** said.

Joblessness is down to about 5 percent countywide. But in Central Broward, it ranges from 21 percent in Boulevard Gardens, to 22 percent in Roosevelt Gardens, to 32 percent in Washington Park, to an astounding 44 percent in Franklin Park. Holness said many residents there lack transportation and job skills, and some have criminal backgrounds — all obstacles to employment. Countywide, the median household income is \$51,251. In the central county area, it's significantly lower, at \$33,432, Assistant County Administrator Alphonso Jefferson said. Crime is down there, county officials said. Still, the number of rapes, burglaries, car thefts and assaults are relatively high in such a small area, county leaders said, and residents complain they regularly witness drug deals and prostitution, as well as assaults. Broward County Administrator Bertha Henry said she would begin implementing the economic development ideas discussed Tuesday. McDonald said he hoped to leverage the money to spark private investment from business owners. Each project will return to a County Commission agenda for approvals. Across downtown, at the Fort Lauderdale City Commission, Commissioner Robert McKinzie asked that the city take another look at annexing the unincorporated areas. The city will move in that direction.

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Roberto Hernandez
(Articles are in reverse chronological order)

Broward New Times (FL)
 March 18, 2014

Florida Panthers Asking for Public Money, but Proposal Seems to Benefit Only the Team

Author: *Chris Joseph*

Looks like the Florida Panthers' latest proposal to Broward County has altered language that would basically screw over the county while they make the big dough, according to a rundown of the proposal by the Sun Sentinel. The first proposal the Panthers made at the beginning of the year had asked the county for something around \$70 million, claiming that they had been losing \$20 million and that they need public funds to keep from being dissolved from the NHL. This latest proposal asks for \$80 million or more. The Panthers also want to develop 22 acres north of the BB&T Center for a casino-hotel that the county is also supposed to pay for. The Panthers turned over the 57-page proposal to Broward County commissioners and, according to the Sentinel's findings, it boils down to more money for the team while the county gets the shaft. Those wishes are not far off from when the team asked for county money originally back in January. The team's original proposal included taking \$4.5 million of its annual payment off the books and having it picked up by Broward County. The team also asked the county to contribute \$500,000 a year toward maintenance.

The latest proposal says the Panthers need a hotel-tax subsidy package worth \$80 million over the next 14 years to keep them from losing money. But the overall deal would seem to benefit only the Panthers. "As currently written in their proposal," Deputy County Administrator **Rob Hernandez** told the Sun-Sentinel, "it would definitely have an impact on our ability to share in any of the profits." County officials say they won't support the proposal without a better return for Broward's taxpayers. Back in September, the Panthers were bought for \$240 million by Cliff Viner and Sunrise Sports & Entertainment to a group led by New York businessman Vincent Viola. The Panthers have had an operating loss of \$12 million for the 2011-12 season and were worth \$170 million, according to Forbes. As for Panther and hockey fans' reaction to this, they took to Twitter with the usual vitriol.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

US Fed News (USA)
August 11, 2013

Broward County Names New Deputy County Administrator

Author: *Staff*

Broward County has issued the following news release:

Broward County Administrator Bertha Henry has announced the appointment of **Roberto "Rob" Hernandez** as the new Deputy County Administrator. **Hernandez** is an experienced public servant who served as deputy county manager for Fulton County, Georgia, and most recently as deputy city manager for Coral Springs in Broward County. He is returning to County Government, where he first began serving the County in 1994 and most recently served as an assistant to the county administrator from 2003 to 2008. As deputy county administrator, **Hernandez** will assist the administrator in managing the day-to-day operations of the County, and oversee the activities of several large departments, including Public Works, Human Services and Environmental Protection and Growth Management, as well as the Parks and Recreation, Libraries and Cultural divisions. Also reporting to **Hernandez** will be the Office of Economic and Small Business Development, Office of Public Communications, Office of Intergovernmental Affairs and Professional Standards, and the Office of the Medical Examiner and Trauma Services.

Henry said, "We are excited to have **Rob** back with Broward County. He has dedicated much of his professional life to public service and has a keen understanding of how county government programs and services help meet the needs of our residents, businesses and visitors. He will be a valuable asset to the County and the community." **Hernandez** has a bachelor's degree in public administration from Florida International University, and a master's degree in public administration from Nova Southeastern University. He is a graduate of the Broward Fire Academy and the U.S. Army John F. Kennedy Special Warfare Center and School. He retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

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Roberto Hernandez
(Articles are in reverse chronological order)

McClatchy-Tribune Regional News (USA)
February 6, 2013

Brief: Coral Springs Offers Incentive to Company

Author: *Lisa J. Huriash*

Taxpayers will be handing over cash to a new business considering coming to town, although they don't know yet who is getting the check. City officials said the business, described as a "pharmaceutical manufacturing, research and development" company, is a coup for the city. The company is expected to bring 108 jobs and a new source of tax revenue to the city.

Dubbed "Project Rock Solid," the business will receive \$540,000 in state, county and city money in incentives through the state's qualified target industry tax refund program. In addition to the city's portion of \$54,000, city commissioners agreed Tuesday to allow \$825,000 in credits that would normally be paid for fees such as building permits.

"The bottom line is if we don't offer incentives, somebody else will," said **Rob Hernandez**, deputy city manager. "It's the cost of doing business." The company is allowed by state law to remain unknown to the public while it's in this process of receiving incentive money. **Hernandez** said the company asked to remain anonymous for competitive reasons.

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Roberto Hernandez
(Articles are in reverse chronological order)

McClatchy-Tribune Regional News (USA)
 December 13, 2012

Coral Springs to Consider building New City Hall

Author: *Lisa J. Huriash*

City commissioners said Tuesday they were open to the idea of spending millions of dollars to construct a brand new City Hall. "To me, the short answer is yes," said Commissioner Claudette Bruck. "We should proceed and we should proceed now." City leaders must now decide if they really want the new building, where it will go and how to pay for the estimated \$25 million cost. It will eventually be a "financial decision," said Vice Mayor Tom Powers. "There's way too many questions." For about a year, former Mayor Roy Gold had proposed closing both City Hall buildings on the north and south sides of Sample Road to construct one large facility.

But while some commissioners had previously said the project could become unwieldy and too expensive and they doubted there would be public support, the majority now seem open to at least further discussion. Deputy City Manager **Rob Hernandez** said the 45-year-old building was "outdated and functionally obsolete." "You can go anywhere and hear conversations in the next office," he said. And, the current building is "not a source of civic pride." "That's depressing," Bruck said. **Hernandez** also said the current building is expensive to keep up, with \$1 million alone needed to retrofit the building to accommodate a new telephone system.

"If we're pouring money into a facility that is no longer worth pouring money into," the commission should consider a new building, said Commissioner Dan Daley. City Manager Erdal Donmez said the city staff will come back with "more refined numbers" in late January with the projected costs to build a new City Hall at various spots, which include the current location, Mullins Park, and the area envisioned to be built as a downtown.

Several South Florida cities have recently built new City Hall complexes. Doral earlier this year spent \$22 million on its new building and Wellington built its new building last year for \$10.5 million. In Coral Springs, officials said municipal bonds would be the best way to cover the expense Commissioner Larry Vignola said he has always opposed the plan and still does. "Is it a top priority to spend more than \$20 million on? Not in my opinion, and not in the opinion of the majority of our residents. I don't why we're still talking about this. I don't think now is the time for a project like that."

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Roberto Hernandez
(Articles are in reverse chronological order)

South Florida Sun Sentinel (FL)
November 24, 2011

Springs Gets New Deputy City Manager

Author: *Arun Sivasankaran*

Roberto Hernandez, who has over 20 years of progressive and responsible local government management experience, has been appointed Coral Springs Deputy City Manager. "I look forward to leveraging **Rob's** operational expertise to continue delivering exceptional services to our community with the best possible level of service," City Manager Erdal Donmez said. Prior to joining Coral Springs, **Hernandez** was the Deputy County Manager for Fulton County since 2008. **Hernandez** also served as an Assistant to the County Administrator for Broward County. Before that, **Hernandez** served in a number of key roles with local government.

His professional experience includes key positions in public safety, housing and community development, and social services. In addition, his military service includes more than 23 years in the U.S. Army Reserves. He has held several leadership positions and has served on Active Duty in support of several military operations. **Hernandez** holds a Master of Public Administration degree from Nova Southeastern University and a Bachelor of Public Administration from Florida International University. **Hernandez** also obtained his certification in firefighting from the Broward Fire Academy.

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Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
 May 25, 2011

Illegal Dumping

Putting the Brakes on Tire Dumping

It's no Easy Task as Illegal Activity Stealthily Spreads Across State

Author: *Ernie Suggs*

Over 10 days last fall, someone made three trips to the Arts Exchange and dumped more than 1,000 old, dirty tires onto the property. The location was ideal. Easy access off I-20 in southeast Atlanta. A dead-end road. A wide-open space. Across Georgia, there are hundreds of examples of illegal tire dumping such as this, on public and private lands, creating a problem that is as much health hazard as it is eyesore. Of 10 million scrap tires generated in the state annually, an estimated 1.5 million are discarded illegally, the Georgia Environmental Protection Division said. And Atlanta finds itself at the center of this rubberized abandonment, with its city council compelled this week to form a separate tire commission to combat the violators. The city annually deals with 450,000 scrap tires, nearly 70,000 of them dumped illegally, said Winthrop Brown, Georgia EPD program manager.

Not surprisingly, money is at the heart of this problem: Tire salvagers get paid to collect tires but many of them won't pay for recycling. So they dump the tires. Everywhere they can. "It is a very significant problem in the state, because of the expense and because these tires are breeding spots for mosquitoes and vectors," said Brown, noting that Newton County last year collected 67,000 dumped tires. "Dumping is bad in metro Atlanta because of the population, but dumping is increasing in rural areas because of the distance they have to travel to get rid of tires."

As part of his job, the EPD's Brown regulates how tires are disposed from car dealerships and tire shops, among others. Businesses must pay for a carrier to pick up truckloads of old tires. Otherwise, there is little concentrated enforcement. Tire dumping is a felony, but there are just five criminal cases currently pursued by the state, though several people previously have served prison time for this offense, Brown said. "If nobody calls it in, we have a hard time prosecuting," Brown said, adding there are only a few local jurisdictions, such as Columbus and Macon, that have their own laws on the books, though state regulations exist. In April, Atlanta Councilwoman Joyce Sheperd, who pushed for the tire commission, led a clean-up in District 12 in which 2,000 tossed tires were collected. In southeast Atlanta, she has overseen the retrieval of 4,711 tires this year, and more than 10,000 over the past five years.

Fulton County Deputy Manager **Rob Hernandez** said south Fulton has the same problem as Atlanta with illegal tire dumping and no ready solution. The county has considered putting a deposit price on used tires, similar to glass bottles, to encourage residents to take them to a landfill. "It's difficult to prosecute offenders unless they're caught in the act," **Hernandez** said, "and Fulton lacks the staff to try to trace tires back to suppliers and find out who they were sold to." Last summer, the Fulton County health department spent \$23,000 on a tire drive that netted 2,100 tires. The public works department pays \$50,000 per year to dispose of old tires. "This has been a real problem for us," said Cheryl Odeleye of the Arts Exchange, surveying the endless

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Roberto Hernandez
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and unwanted black mountain left near the center. "It is a health hazard. And it is a morale downer for someone to come in and be so disrespectful to us."

Piles of old tires don't necessarily present toxic health issues, rather they serve as nesting places for rats, snakes and mosquitoes, little consolation to those left with this mess. Across metro Atlanta, jurisdictions vary in how to deal with dump sites. DeKalb County officials said they defer to state law in dealing with tire dumping. In Clayton County, illegal dumping can land someone in jail for six months. Cobb County claimed it hasn't had much of an issue with discarded tires, outside of a few isolated incidents. "What a lot of people don't understand is that there are a lot of expenses involved in tire disposal," Dewey Grantham of Liberty Tire Recycling said.

If operating lawfully, a carrier takes used tires to a recycler, where in Georgia there is a 90 percent chance these tires will be converted to fuel. A carrier typically charges \$2 per tire, but has to pay the recycler \$1 for each, cutting into the profit. An illegal carrier might charge \$1.50 per tire on pick-ups, bypass the recycler and leave the tires at an isolated place like the Arts Exchange. There also have been cases in which people have rented trucks and abandoned them filled with old tires. Bolder criminals have stocked empty warehouses with worn tires. The state lacks funding to properly monitor tire disposal. For every new tire larger than 12 inches and sold in Georgia, a consumer pays a \$1 fee, which was supposed to go to a solid waste fund. Yet for two years, state lawmakers have diverted the funds elsewhere, covering other needs. Limited state spending also has resulted in fewer inspectors, making it harder to monitor and clean up tire dump sites.

The Arts Exchange, even with more than 1,000 tires, had what was considered a small clean-up. Liberty Tire Recycling volunteered to remove the tires, employing four workers. The tires were loaded in less than two hours. Grantham said his company processes 25,000 tires daily. "What is unfortunate is that illegal tire dumping gives tire recycling a bad name," Grantham said.

Tire disposal

Number of scrap tires generated in Georgia annually: 10 million

Number of those that are disposed of illegally: 1.5 million

Fulton public works department's expense each year for tire disposal: \$50,000

State fee charged on each new tire larger than 12 inches that is supposed to fund a solid waste fund, but has been diverted for the past two years for other purposes: \$1

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Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
 May 16, 2011

Your Tax Dollars

Grumbling Greet's Amphitheater

Supporters See Boon for South Fulton; Opponents Question Use of Funds

Author: *Johnny Edwards*

South Fulton has a lot to brag about these days. After last week's announcement that Porsche would leave Sandy Springs to build its North American headquarters near Hapeville, Fulton County officials will open the new 5,200-seat Wolf Creek Amphitheater. Supporters are counting on the venue becoming another Chastain Park, a regional draw where picnicking music fans take in classy, intimate concerts. Fulton County Commissioner William "Bill" Edwards, who has championed the \$6.1 million project for the past decade, predicts it will draw the spending power of concertgoers from throughout the metro area to nearby stores and restaurants, bolstering a local economy hit hard by the recession.

But the amphitheater is a sore subject for north Fulton residents who say it's another case of the county government using their tax money for projects that don't benefit them. State Rep. Lynne Riley, R-Johns Creek, who opposed the amphitheater when she was a Fulton commissioner, said the \$6.1 million shouldn't have come from the county's general fund. "Every citizen of Fulton County, regardless of where they live, top to bottom, is underwriting the cost of operating that facility," she said, "whether it's a gain or a loss."

Edwards said south Fulton residents pay county taxes, too. "South Fulton needs to be able to live, work and play right where they are," he said. Business owners between the amphitheater, which is off Camp Creek Parkway, and I-285 expect a boost. Anwar Noorali, owner of Camp Creek World of Beverage, predicts a 15 percent to 20 percent increase in business on concert days from wine shoppers. "Any economic activity, and concerts that bring in a lot of people, will definitely be good for the local economy," Noorali said.

But some point to the location -- in the flight path of the world's busiest airport -- as an issue. Michael Fitzgerald, a Johns Creek resident and member of the Milton County Legislative Advisory Committee, said he can't fathom making a 45-mile drive to attend a show there, not with the constant roar of jet planes overhead. "One of the problems with Fulton County is it's too big, and that's a long way," he said.

The Wolf Creek Amphitheater has stirred tensions along the way. When the construction contract was approved in 2008, Riley and Commissioner Tom Lowe were outvoted 4-2. Riley contended that figures from a 2005 feasibility study -- which predicted the amphitheater would be profitable after three years -- needed to be updated. Edwards fired back that she and Lowe were trying to sabotage a revenue-generating project that south Fulton wanted. Edwards also brought up that the county spent \$1 million on Alpharetta's Verizon Wireless Amphitheatre, which was privately built. The county's contribution came through a trade-off for north Fulton not having garbage service at the time. Gary Bongiovanni, editor-in-chief of Pollstar Magazine,

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Roberto Hernandez
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said a 5,200-seat venue will have a tough time up against the 6,500-seat Chastain Park in Buckhead, the 12,000-seat Verizon amphitheater, and the 19,000-seat Aaron's Amphitheatre at Lakewood in southeast Atlanta. The proximity to Hartsfield-Jackson International Airport won't help, Bongiovanni said. "Especially if you're talking about doing any acoustic acts," he said.

Fulton County Arts Council interim Director Michael Simanga, whose department will run the amphitheater, said he isn't worried about planes. Before construction began, the county held free concerts at the site, including Atlanta Symphony Orchestra performances. "You can't really hear it, once the music is playing," Simanga said. Grammy-winning soul/R&B singer India Arie will perform a free concert June 4 for the grand opening. No shows have been booked after that, he said, though he's in negotiations for some. Riley questions whether Wolf Creek will cover its operating costs.

The county doesn't have a detailed operating budget yet. Deputy County Manager **Rob Hernandez** said planners didn't expect the facility to be finished this soon, so the upcoming concert season will be something of a trial run, with 10 shows at the most. The plan is to recoup costs through concert bookings, and the County Commission has approved a fee schedule. Expenses should be limited to electricity, water, janitorial maintenance and groundskeeping, like any public park, **Hernandez** said.

Wolf Creek was the shooting venue for the 1996 Olympics, and it currently houses a police training center. A new library is in the works, and other plans include a sports complex, walking trails, horse trails, and an arts, cultural and events center, which also could generate revenue through bookings, Edwards said. Alre Alston, owner of the Ultimate Bar and Grille in Camp Creek Pointe shopping center, expects the amphitheater to bring him customers before and after shows. "I think it will be a good thing, as long as they bring in the quality clientele, not the rough clientele," he said.

Edwards said the county won't allow hard-core rap acts. He's looking for shows that appeal to south Fulton residents, citing performers that played free concerts -- R&B groups such as the Manhattans, the Spinners, the Dells and the O'Jays. However, he said, north Fulton residents are welcome to book shows, too. The amphitheater also can be used for church functions and graduations. On a recent visit, Edwards showed off the massive stage, the pristine dressing rooms for stars and the 4 feet of legroom between the rows of seats. He said he has no doubt the project will pay for itself. "It isn't about being sustaining," Edwards said. "Let me tell you what we want to pay: lights and water. This is for the people, for people to come out here and have a good time."

The Atlanta Journal-Constitution (GA)
January 22, 2011

**Fulton Hikes Club Fees Despite Suit
Judge Declared Adult Ordinance Invalid after Free Speech Dispute
Strip Joints' Attorneys Debating Next Step**

Author: *Johnny Edwards*

Fulton County will raise fees on strip clubs by hundreds of dollars this year and double them for nude dancers, even though the county remains locked in litigation over the fees after a federal judge recently declared the adult entertainment ordinance unconstitutional. With no discussion, the commission voted 5-1 this week to raise a list of fees on businesses and residents in unincorporated south Fulton expected to generate an extra \$303,601 per year. Amid new and increased rates for false alarms, fire safety inspections, escort services and door-to-door salesmen were several license and permit hikes on the county's three nude bars off Fulton Industrial Boulevard.

Attorneys for the clubs say they are considering what to do: whether to seek an injunction or pay the fees and hope to recoup them as damages. "I don't know what right they have to increase them when the case is still being litigated," said Jim Cline, who represents Riley's Showbar. "I guess they can do whatever they want. I guess we can argue about it when we get to the end." **Rob Hernandez**, the deputy county manager for the South Fulton Special Services District, said the county attorney advised officials that since the lawsuit is still pending, Fulton is justified in raising the fees. If a club refuses to pay, it could have its license revoked and would face closure, he said. "There was an injunction ordered on certain aspects of the ordinance, but not all aspects of the ordinance," **Hernandez** said.

County Attorney R. David Ware did not return messages from The Atlanta Journal-Constitution inquiring about the issue. The judge's ruling arose from a First Amendment lawsuit filed by a group of clubs in 2001 that challenged the county's revved-up regulation of nude dancing as a prior restraint on free speech, part of a larger battle being waged throughout metro in both state and federal courts. The clubs won the 2001 case in U.S. District Court. It was reversed on appeal, and then it was sent back to District Court. In November 2010, Senior U.S. District Judge Robert Vining ruled that the code illegally put the clubs through a bureaucratic wringer, making them wait indefinitely for approval from police, fire and building departments. While Vining withheld judgment on whether the fees were too high, he did say that if sections of the ordinance don't hold up, none of it can stand. "Judge Vining has said that we don't have an ordinance," Cline said. "Unless they appeal, then there's no ordinance unless they go back and pass one."

But starting Feb. 1, the county will raise the cost of an adult entertainment license from \$6,000 to \$6,400 and annual license renewal from \$4,000 to \$4,300. Employee permits will rise from \$300 to \$325, permit renewals from \$50 to \$100, employee background checks from \$50 to \$55 and fire inspections from \$30 to \$75. The increases are expected to generate an additional \$11,590 per year. Cary Wiggins, an attorney for Fannie's Cabaret, said that since nude dancing is protected speech, a county's licensing fees can be no more than the cost of regulation. He said

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Roberto Hernandez
(Articles are in reverse chronological order)

there is no evidence that nude bars cause any more problems for police than regular bars, and he doesn't see how Fulton can charge \$4,000 to renew a license, much less \$4,300. "I'm just unaware of any evidence justifying a rate hike," Wiggins said.

The third club off Fulton Industrial, Club Babe's, isn't taking part in the lawsuit. Managers at all three declined interview requests. Wiggins also represents two Sandy Springs clubs that, while no longer in unincorporated Fulton, are seeking back compensation from the period before Sandy Springs became a city. As with the state government and other local jurisdictions, the Fulton fee hikes are part of a strategy to make up for declining revenue without burdening property-tax payers. **Hernandez** said he is also trying to recover costs and adjust an array of charges, many of which haven't changed in five years, for inflation. North Fulton Commissioner Liz Hausmann cast the sole dissenting vote Wednesday. She told the AJC that she opposes raising any fees or taxes in this economy without reducing spending. She said she wasn't aware of the strip club issue.

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Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
 May 17, 2010

County Targets Image Change
Campaign is to Clean up Fulton Industrial
Code Enforcers, Police Start out Cracking Down on Boulevard's Motels
 Author: *Steve Visse*

Fulton County has an image problem with its huge warehouse district: Its legitimate economic opportunities sometimes have been overshadowed by its undesirable qualities. This has caused companies to bypass it and take their business across the Chattahoochee River to Cobb and Douglas counties, or get out of Fulton and relocate. "We have had tenants who have been there for years and years and who decided to move across the river," said Tom Flanigan, ING Clarion asset manager. "I don't think it was taxes." To attract new business and keep what it has, Fulton is pushing a campaign designed to clean up what it says is the 10 percent of Fulton Industrial Boulevard that gives the rest of it a bad name. For starters, code enforcers and police have targeted motels that allegedly were centers for sex and drug trades; three were closed for health and safety violations, and a fourth was sold to a new owner, who refurbished the property and secured a Days Inn franchise.

The new motel has posted rules in the lobby banning unregistered guests from rooms and requiring identification to reserve a room as a customer. "We got rid of a hub of criminal activity," said Tom Phillips, county code enforcement administrator. "You can walk in there now and say, 'I can stay here.' Two years ago you wouldn't have said that. You might not even have walked in there." At its last meeting, the County Commission banned truck drivers from parking their big rigs in vacant lots off the boulevard and using them as unofficial truck stops. "Truck stops, as you know, have a link to prostitution," Phillips said. Even strip clubs such as Fannies' Cabaret are seeking a more orderly boulevard. Fannies' is trying to distance itself from prostitution, specifically the hookers who regularly have solicited the club's clientele when arriving and leaving. The club hired security to run them off. "It didn't used to be this way 15 years ago," said Thomas Madden, Fannies' Cabaret general manager.

Police have cracked down, making 107 prostitution arrests in the past two years compared to 41 in the three previous years, according to county statistics. The county is committed to restoring a clean-cut image to the boulevard's seven-mile roadway that runs from Fulton County Airport at Charlie Brown Field to Campbellton Road in south Fulton, according to Deputy County Manager **Rob Hernandez**.

The area has 89 million square feet of warehouse and commercial space but a county study released in March showed that several buildings and warehouses, developed in the 1960s and 1970s, are practically unusable. Seven properties are listed on the Georgia Hazardous Site Inventory, including five for the presence of cancer-causing vinyl chloride. Noting its potential, the study described the boulevard as potentially one of the largest and most prestigious warehousing and transportation hubs east of the Mississippi River. "Today it may still be the largest, but it has lost much of its prestige," the report concluded. Last month, the county used

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Roberto Hernandez
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the area blight and vacant warehouses to have the district reclassified as an opportunity zone urban redevelopment area. That allows it to borrow \$26 million from a federal bond program and give employers a \$3,500 tax credit for each new job for 10 years. **Hernandez** said the county wants to use the bond money to install crime surveillance cameras in the area. A \$100,000 federal grant already was secured to increase police patrols and hire seven officers specific for south Fulton. "We're serious about this," **Hernandez** said. "We have put together everything we have available in our tool box to assist Fulton Industrial."

Satellite offices for county services and commissioners Emma Darnell and Bill Edwards have been set up to show the county is committed to improving the area. People have noticed. Companies recently either bought or leased separate industrial properties that cover a combined 260,000 square feet. With upgrades, the area should be able to sell itself. It is located in the center of a metro area that promotes itself as a national transportation hub. Fulton Industrial offers a regional airport and is close to Hartsfield-Jackson International Airport. I-20 is located nearby, as is the Norfolk Southern Intermodal container shipping yard in Austell, an industrial area crisscrossed by railroad tracks.

A next step would be to develop a Community Improvement District, which has happened elsewhere in Fulton and in Cobb, DeKalb and Gwinnett counties. CIDs require commercial property owners to tax themselves to pay for development plans, transportation alternatives and security. Boulevard activists so far have been unable to obtain 51 percent approval of the property owners to install a CID, which increases tax bills by 3 or 4 mills. Yet one man on board with this idea is Madden, the strip club manager, who recognizes that even the adult entertainment business needs better security. "We have to keep it clean here," he said.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
 October 9, 2008

Fulton Begins Taking Steps to Aid 911 Center

Author: *D. L. Bennett*

Fulton County has begun making changes that officials hope will improve a 911 center beset by chronic understaffing and dangerous operator errors. By filling 12 vacancies and promising reforms to reduce job-related stress, county officials say they should be able to boost both work quality and employee retention. "We are adamant when we say we are going to solve the problems in the center," said **Roberto Hernandez**, deputy county manager. "Once we know all the facts, we will address it immediately. We will fix it."

Problems at the center that takes emergency calls and dispatches aid were discovered in August when an operator mistakenly sent help to the wrong location for a Johns Creek woman who later died. An Atlanta Journal-Constitution investigation found more than 1,000 write-ups of employees during the past five years for everything from fighting, dispatching mistakes and chronic tardiness to falling asleep on the job. Current and former employees complained that understaffing leads to workers being routinely forced to work 12- and 16-hour days, straining family life and causing conflicts in the center, dispatching and call-taking errors. The inquiry found mistakes that endangered not only callers seeking help but the emergency crews sent to provide aid.

Fulton also has launched three of its own investigations -- one by an outside consultant reviewing center operations, another by police of the incident on Aug. 2 and a third by **Hernandez** and others looking at employee satisfaction issues. Rather than wait for those all to be complete, County Manager Zachary Williams has filled 12 of 33 openings for communications officers and supervisors by reassigning operators who previously provided service for the city of Milton under contract. Milton dispatching is now handled by Alpharetta.

"This definitely should add value and reduce stress on the staff," said Commissioner Lynne Riley, who represents the city of Johns Creek, where Darlene Dukes died Aug. 2. Fulton also has in process two classes of trainees who should be able to fill all the remaining spots, a move he hopes will cut down on stress at the center and reduce conflict and mistakes. Everyone should be on the job within six months, **Hernandez** said.

"We remain committed to excellence in all public safety services, and recognize that 911 operators are the first link in the chain of emergency response," said Williams. "These men and women save lives each day." The auditor's report is now due Nov. 10. The internal probe by police should wrap up this week. **Hernandez** said the committee's work on employee issues is ongoing and its plans address issues like child care for employees who work odd hours and stress management.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
 October 5, 2008

Not Enough Workers and a lot of Slack

Author: *Heather Vogell & D. L. Bennett*

A supervisor told 911 worker JoLynn Griffin she didn't have any days left for vacation. The Fulton County emergency center had barely enough workers to cover shifts. But Griffin went on a cruise anyway. She returned to find her job waiting, her personnel file shows, just as it had been when she'd missed work before. Chronic absenteeism and tardiness are among the center's most vexing problems, records and interviews suggest, accounting for roughly a quarter of all personnel infractions and aggravating a staffing shortage that can mean marathon shifts for the dispatchers who do show up. Griffin is one of scores of Fulton 911 employees who racked up roughly 280 sanctions for arriving late or not at all -- often on multiple days -- a database of personnel actions since January 2004 reveals. The problem is likely worse; officials say their data is not comprehensive.

No-shows were counseled, warned and occasionally suspended. But they were rarely fired, data show. Some workers accumulated long disciplinary histories that included 911 call errors as well as absences, and they weren't terminated, according to personnel files. "It appears that certain violations of performance were tolerated or forgiven, for lack of a better word, in order to maintain the staffing required to operate the center," said Lynne Riley, a Fulton commissioner. Losing trained employees wasn't an attractive option for the 911 center. In recent weeks, as many as a third of the center's total positions have sat vacant. Deputy County Manager **Rob Hernandez** said staffing shortages are common at 911 centers, but Fulton's center needs to train more new workers and improve retention. A county consultant should address discipline problems such as absenteeism, he said. "In general, discipline was used like a tool -- a management tool -- rather than as a last resort," he said. "It may have lost its intended effect."

Data show at least eight 911 workers have been sanctioned 10 or more times for playing hooky or walking in late since 2004. Migraines, oversleeping and not feeling well were regular excuses, files say. Employees also blamed a pet illness, panic attack, traffic, getting back in town late, driving a child to school, car problems and a broken toilet. Even current center director Crystal Williams has filed her share of tardy slips, records show, citing late starts, trouble finding parking, feeling ill and, on at least three days, alarm clock malfunctions. Reached by phone, she declined to comment. Former 911 center employees said chronic tardiness and absenteeism led to feuding among staffers. Cassandra Eloi said that during her year at the center it was common to be held over for extra work because others failed to show. Those who did come in often worked 12 to 16 hours straight, she said. "You are running a 911 center on minimal staffing every day," said Eloi, who was fired for being rude to callers. "You have calls holding. You have calls dropping, every day."

Griffin left without permission for the cruise and two other short vacations between September 2003 and March 2004 -- in addition to taking dozens of sick days and showing up late at least 14 times, records show. Alfred "Rocky" Moore, the center's director at the time, wrote in a March

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

2004 letter that he was considering dismissing her. "Your personal vacation [cruise] did not justify an emergency vacation," he wrote. But Griffin hung on, volunteering for a demotion instead. Her tardiness continued. One night in January 2006, the call center sent a Fulton sheriff's car to pick her up for work because she had car trouble, records show. Later that year, she was suspended after supervisors said an error she made delayed response to a fire call. She took disability retirement in mid-2007.

Griffin, a 23-year center veteran who was called "an excellent supervisor" in a 1995 job review, said in an interview she disputes that she caused a delay on the fire call, or that her unpaid leave resulted in a staffing shortage that couldn't be covered. She said she was singled out for infractions that others -- including supervisors -- also committed. She felt Moore had a grudge against her. "There was no reason to deny me," Griffin said of her vacation requests. "It's not like I didn't do my share of covering for people, either."

Other workers also complained discipline was not handed out evenly. "There are subjects who manage to be sick every payday weekend and never receive any type of discipline from your same staff," communications officer Francesca Pearson wrote in an April memo to Moore. Pearson could not be reached for comment for this article. Morale was low. After a supervisor threatened one employee with suspension for tardiness, she responded: "go ahead and suspend me that's one less day that I have to work here," a note in her personnel file said. Moore, who was reassigned, did not return three phone messages seeking comment.

The 911 center hasn't lacked the money to fill vacancies. For the past three years, the center -- funded by fees tacked onto phone bills -- has ended the year with excess cash in its salary account, records show. In 2007, it finished nearly \$1 million richer than it started. Instead, **Hernandez** said the center appears unable to keep up with attrition. Some drop out during the intense six-month training period. Others start but find the pressure and night shifts unworkable. Child care and worries about job security as some cities encroach on Fulton's call territory are also factors, he said. He said he does not want to second-guess center managers on their handling of absent employees. But it is a serious problem. "I know my boss would consider that to be job abandonment," he said.

Data analysts John Perry and Megan Clarke and staff writer Cameron McWhirter contributed to this article. 32 emergency calls delayed. Six of those calls were delayed more than 20 minutes.
 * 23 instances of employees being orally abusive, fighting, being unprofessional or disruptive in the call center. 34 write-ups for poor customer service. 9 instances of dispatchers sleeping on duty. 280 write-ups of not showing up to work or showing up late. 147 write-ups for not meeting monthly standards for speed and safety by the department.
 * Numbers based on a review of the incomplete database of disciplinary actions against employees at Fulton County's 911 center.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
 April 29, 1997

Conditions for Planned Shelter don's Allay Fears

Author: *Robin Benedick*

No matter how many conditions the city puts on the proposed homeless shelter on West Sunrise Boulevard, they won't appease nearby property owners who worry about transients congregating near their homes, businesses and public parks. "Those conditions won't keep vagrants from wandering around the neighborhoods," said Fort Lauderdale Vice Mayor Tim Smith, who is among the shelter's harshest critics. "Unless there are incredibly stringent rules that you can only go in by vehicle and leave by bus, that neighborhood is going to be overrun."

Smith and neighborhood leaders are hoping to derail Broward County's plans for a \$7.7 million shelter at 600 W. Sunrise Blvd. Their first chance comes at a special meeting of the city Planning and Zoning Board at 6:30 p.m. Wednesday at City Hall, 100 N. Andrews Ave. The board's recommendation goes to city commissioners for hearings. One of the conditions the city wants to put on the proposed 200-bed homeless assistance center is that it accept no walk-ins - only tenants who are referred there by an agency or police. That means homeless people now accustomed to staying the night at Tent City, the dingy open-air camp in a downtown parking lot, won't get into the new shelter without referrals.

Opponents are pushing the planning board to delay approval until Broward hires a not-for-profit group to run the center and community leaders raise \$3 million in private donations for the project. The shelter is expected to be completed in 18 months once city approvals are granted. Broward County's architect, Edward Seymour, has designed a two-story shelter patterned after one in Miami. The building would face Sunrise Boulevard, but entrances and parking would be at Northwest Sixth and Seventh avenues. The fenced campus would have separate men's and women's dormitories with room for families, classrooms, a medical clinic, day-care center, dining hall and courtyard.

City planners are recommending approval with these conditions:

- Availability: Center must give priority to Fort Lauderdale's homeless who are within two miles of the center.
- Security: Center must pay for 24-hour security inside and outside the campus.
- Curfew: Center must require tenants to be inside from 8 p.m. to 7 a.m. daily. Exceptions would be made for school or work.
- No walk-ins: Center must not accept people without a referral. Center also must establish a no-loitering policy on the property and post signs.
- Citizen board: Center must set up a neighborhood advisory board.

County officials said they were designing a shelter that wouldn't be a magnet for uninvited homeless people. "The word will quickly get out among the homeless that this facility does not accept walk-ins," said **Rob Hernandez**, Broward County's assistant director of Human Services. With more than 5,000 homeless people in Broward, the shelter is billed as the first of several to

Internet – Newspaper Archives Searches**Roberto Hernandez*****(Articles are in reverse chronological order)***

address a growing problem that could get worse under new federal and state welfare reforms. Homeless advocates worry that police will enforce trespassing and other city laws too eagerly to chase transients from public places. "Being homeless is not a crime and it shouldn't be that they go to jail for that," said Dianne Sepielli, a member of the county's homeless advisory board.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
 March 13, 1994

New Refugees like Broward Cuban Immigrants Find more Opportunities, Less Congestion

Author: *Lyda Longa*

When Geovanny Montes de Oca and 11 of his friends set sail from Havana for the United States aboard a rubber raft in October, Montes de Oca's friends couldn't stop talking about Miami. But after the men were rescued by the U.S. Coast Guard and taken to Key West, Montes de Oca set his sights on a different place: Broward County. His relatives had described Broward as an area where plenty of opportunities could be found. "I like Miami, but up here, there's less congestion and life is more relaxed," Montes de Oca said in Spanish. "I love it here because I'm learning English, I have a job and I even got a car," he said. Montes de Oca works at the Fort Lauderdale-Hollywood International Airport's catering service. Montes de Oca, who lives with friends in west Hollywood, is not alone. In the past six months, a colony of about 50 or 60 Cuban rafters has taken root in Hollywood and Fort Lauderdale.

The reason is simple: The rafters believe that employment and housing are easier to get in Broward than in Dade County. Historically, rafters have flocked to Dade County because they felt more comfortable among their Cuban countrymen, said **Roberto Hernandez**, executive director of Hispanic Unity of Florida. But that's changing. "Lately, the rafters have learned that in Broward there is less congestion and a better chance of finding a job," **Hernandez** said. "Many of them also have friends and family in the area who have told them that Broward County has less Hispanics and less competition for work."

According to the 1990 U.S. Census, there were roughly 109,000 Hispanics in Broward County compared to almost 1 million in Dade. Of those, there were 24,000 Cubans in Broward and almost 570,000 Cubans in Dade. Hector Nodarse, 29, heard about Broward County when he was still in Havana earlier this year. Nodarse was a sound technician with El Ballet Nacional de Cuba - the Cuban National Ballet. "I like the hustle and bustle of Miami because it reminds me of Havana, but I already have a job here {in Broward}," Nodarse said. "Broward is a little too quiet for me, but I'll get used to it."

Brothers Roberto and Raydel Rivera of Dania are two more Cuban rafters who ended up in Broward. The Riveras arrived in Miami aboard a rubber raft in December; they came from the Cuban port town of Mariel. Both are learning English at a night school in Hollywood. "I lived in Miami for about a month before I came to Dania, and I tell you life is better here," Roberto Rivera, 22, said in Spanish. "I'm learning English, I just got my driver's license and soon, I know I'll have a job. Once I get that I'll get my own apartment. Life is good here."

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
 February 22, 1994

Planned Center may Help Elderly Hispanics

Author: *Lyda Longa*

Inez Carrascillo is an elderly Hispanic woman who wants somebody to talk to. When you're 76 and the only language you speak is Spanish, it's hard to make friends in a neighborhood filled mostly with young working Anglos. Soon, Carrascillo, who is Cuban, and other elderly Hispanics in Broward County could have a place to spend time together, working on arts and crafts and chatting in Spanish.

Roberto Hernandez, director of Hispanic Unity of Broward, said he hopes to open the county's first senior center for Hispanics in the next few months. The proposed center, which would be in Hollywood, would provide activities, meals, transportation and companionship for Broward Hispanics over 60. The 1990 U.S. Census estimated there were 11,891 elderly Hispanics in the county. "There is no single place in Broward County where elderly Hispanic people can go just to talk and relax with their peers," **Hernandez** said. "When you reach a certain age, you want to be with other people who share a similar culture and can understand you."

Hernandez, 27, has applied for a \$100,000 county grant that would pay for four full-time employees for the planned center. Last year he purchased a 7,000-square-foot building at 5840 Johnson St. for the center with the help of a grant from the city of Hollywood. Edith Lederberg, executive director of the Area Agency on Aging, said she has promised **Hernandez** that her organization would provide meals for the center once it opens.

Although there are a handful of senior centers scattered throughout the county, Lederberg and other social service officials agree that none cater specifically to Broward's Hispanic elderly. "We have several senior centers throughout the county, but elderly Hispanic people won't go there because they feel uncomfortable and out of place," Lederberg said.

That feeling is not limited to elderly Hispanic people. Gema **Hernandez**, a sociologist and associate professor at Nova University's School of Business, said the sentiment is shared by most elderly people of varying ethnic backgrounds. "As we age, most of us have a need to return to our ethnic roots," **Hernandez** said. Carrascillo, who stays alone during the day in her west Hollywood home while her daughter and grandchildren go to work and school, said she needs someone to interact with during those long hours.

Research Compiled by: Amanda Dillabough
 Colin Baenziger & Associates

Appendix D

Sample Survey *Savannah City Manager Quality Survey*

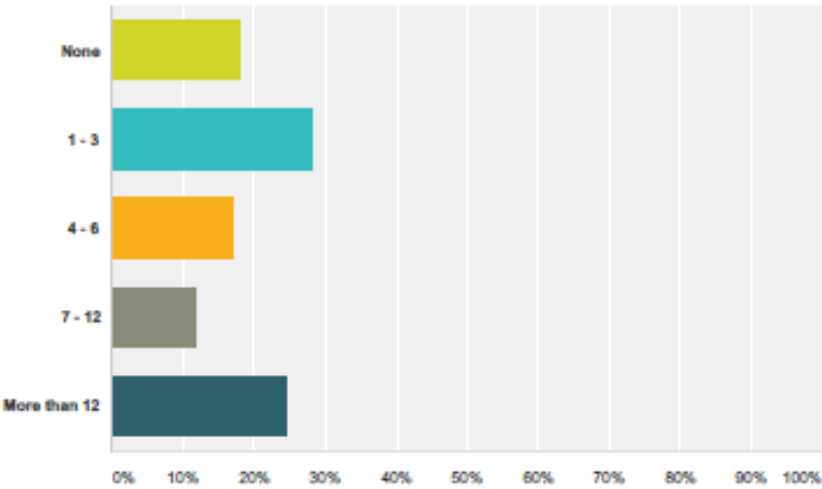
Sample City Manager Quality Survey

Savannah City Manager Quality Survey

SurveyMonkey

Q1 During the past three years, how often have you attended or viewed a city council or city commission meeting (select only one)

Answered: 449 Skipped: 1



Answer Choices	Responses
None	18.26% 82
1 - 3	28.29% 127
4 - 6	16.93% 76
7 - 12	11.80% 53
More than 12	24.72% 111
Total	449

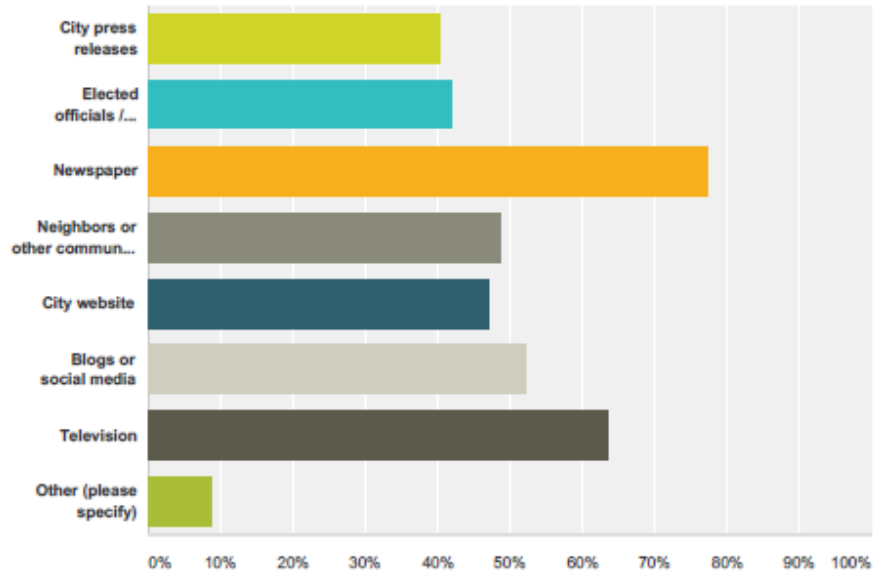
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q2 How do you keep informed of City issues and concerns (select all that apply)

Answered: 450 Skipped: 0



Answer Choices	Responses	
City press releases	40.22%	181
Elected officials / city staff	42.00%	189
Newspaper	77.56%	349
Neighbors or other community members	48.67%	219
City website	47.11%	212
Blogs or social media	52.22%	235
Television	63.78%	287
Other (please specify)	8.67%	39
Total Respondents: 450		

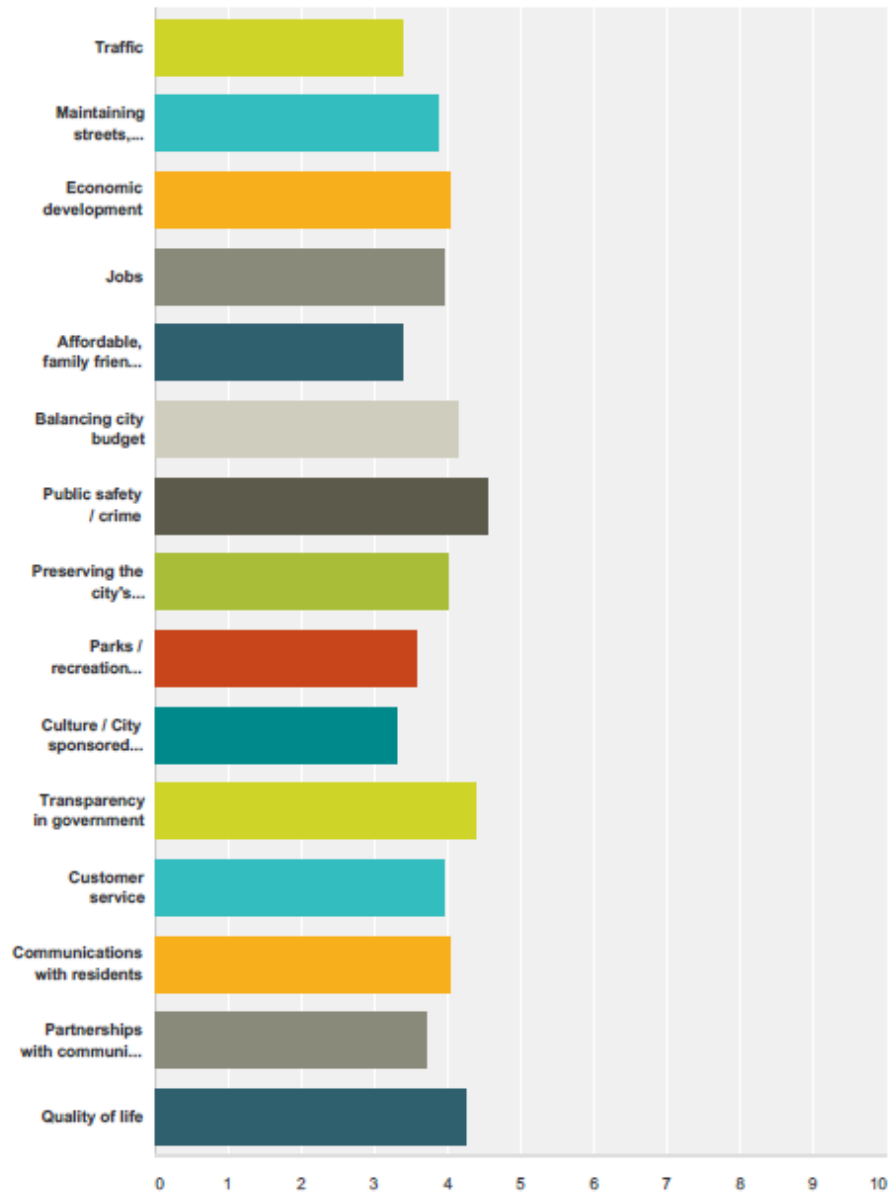
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q3 Please rank each of the following issues that the City Manager should address (5 being the most important and 1 as not important)

Answered: 448 Skipped: 2



Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey							SurveyMonkey	
Traffic	6.59% 28	12.47% 53	35.06% 149	24.00% 102	21.41% 91	0.47% 2	425	3.41
Maintaining streets, buildings, and other public facilities	2.30% 10	7.36% 32	23.22% 101	33.79% 147	32.64% 142	0.69% 3	435	3.88
Economic development	6.19% 27	6.42% 28	13.76% 60	22.25% 97	48.85% 213	2.52% 11	436	4.04
Jobs	5.61% 24	7.71% 33	16.82% 72	22.66% 97	44.86% 192	2.34% 10	428	3.96
Affordable, family friendly housing	10.39% 45	13.39% 58	28.41% 123	19.40% 84	27.48% 119	0.92% 4	433	3.41
Balancing city budget	3.63% 16	5.22% 23	13.83% 61	27.89% 123	47.62% 210	1.81% 8	441	4.13
Public safety / crime	3.83% 17	2.03% 9	5.63% 25	10.36% 46	74.77% 332	3.38% 15	444	4.55
Preserving the city's character	5.68% 25	5.68% 25	17.50% 77	23.41% 103	46.36% 204	1.36% 6	440	4.00
Parks / recreation programs	3.90% 17	7.57% 33	33.94% 148	32.11% 140	21.56% 94	0.92% 4	436	3.60
Culture / City sponsored events	7.74% 34	12.98% 57	35.99% 158	28.02% 123	14.81% 65	0.46% 2	439	3.29
Transparency in government	3.61% 16	2.71% 12	10.84% 48	14.67% 65	65.24% 289	2.93% 13	443	4.39
Customer service	4.52% 20	6.79% 30	20.59% 91	24.89% 110	42.31% 187	0.90% 4	442	3.95
Communications with residents	4.31% 19	4.76% 21	18.37% 81	26.53% 117	44.90% 198	1.13% 5	441	4.04
Partnerships with community / schools / business	8.18% 36	8.41% 37	22.50% 99	24.32% 107	35.68% 157	0.91% 4	440	3.72
Quality of life	4.56% 20	2.96% 13	12.07% 53	20.96% 92	56.72% 249	2.73% 12	439	4.26

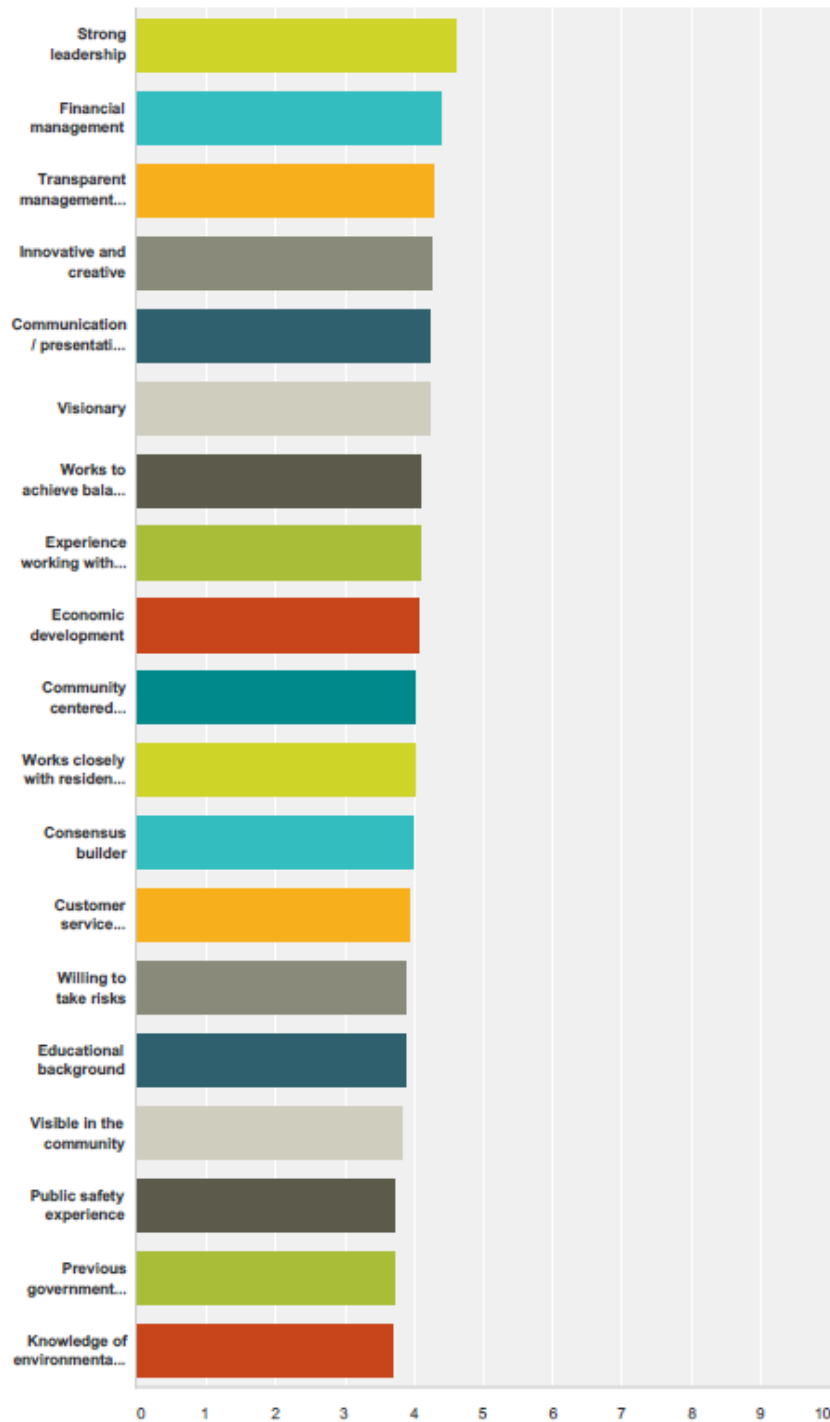
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q4 Please rank each of the following skills the next City Manager should have (5 being the most important and 1 as not important)

Answered: 449 Skipped: 1



Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

	1	2	3	4	5	N/A	Total	Weighted Average
Strong leadership	4.51% 20	1.13% 5	3.39% 15	10.61% 47	79.01% 350	1.35% 6	443	4.61
Financial management	3.38% 15	3.15% 14	8.33% 37	20.72% 92	63.06% 280	1.35% 6	444	4.39
Transparent management style	3.83% 17	2.25% 10	13.06% 58	20.50% 91	58.78% 261	1.58% 7	444	4.30
Innovative and creative	4.10% 18	2.28% 10	14.81% 65	20.27% 89	57.86% 254	0.68% 3	439	4.26
Communication / presentation skills	3.62% 16	3.39% 15	13.12% 58	25.57% 113	53.62% 237	0.68% 3	442	4.23
Visionary	5.22% 23	2.95% 13	12.70% 56	20.63% 91	57.37% 253	1.13% 5	441	4.23
Works to achieve balance among all community interests: residents, businesses and developers	2.95% 13	6.35% 28	15.19% 67	26.98% 119	47.39% 209	1.13% 5	441	4.11
Experience working with diverse communities	6.07% 27	5.39% 24	14.16% 63	21.12% 94	52.36% 233	0.90% 4	445	4.09
Economic development	4.57% 20	5.25% 23	14.16% 62	28.54% 125	45.89% 201	1.60% 7	438	4.06
Community centered approach	4.78% 21	5.01% 22	17.31% 76	27.56% 121	44.65% 196	0.68% 3	439	4.03
Works closely with residents and seeks their viewpoint	4.08% 18	4.31% 19	17.46% 77	31.75% 140	41.72% 184	0.68% 3	441	4.03
Consensus builder	4.31% 19	6.12% 27	20.63% 91	24.04% 106	43.54% 192	1.36% 6	441	3.96
Customer service orientation	5.24% 23	5.92% 26	18.00% 79	28.93% 127	41.00% 180	0.91% 4	439	3.95
Willing to take risks	5.25% 23	5.02% 22	23.74% 104	26.26% 115	38.81% 170	0.91% 4	438	3.89
Educational background	3.64% 16	7.05% 31	22.95% 101	27.05% 119	37.27% 164	2.05% 9	440	3.89
Visible in the community	4.58% 20	7.09% 31	24.71% 108	26.32% 115	36.61% 160	0.69% 3	437	3.84
Public safety experience	4.49% 20	8.31% 37	26.97% 120	27.42% 122	31.69% 141	1.12% 5	445	3.74
Previous government experience	8.07% 36	7.17% 32	24.22% 108	23.54% 105	35.43% 158	1.57% 7	446	3.72
Knowledge of environmental issues	7.06% 31	8.43% 37	25.28% 111	24.83% 109	33.26% 146	1.14% 5	439	3.70

Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q5 Is there anything else you want to share about what you would like to see in our next City Manager?

Answered: 230 Skipped: 220

Put the NEEDS of residents of the City of Savannah FIRST! Before the tourists, the business developers, etc.
A dedication to addressing the gun violence in our city.
More visibility to the community as a whole including the unincorporated areas, not just to specific groups.
Interest in building a bike and pedestrian friendly city.
A major interest in the environment and sustainability of it.
A familiarity with and support for Complete Streets.
Good working relationship with citizens and police. Ability to work to preserve neighborhoods. Savannah is not just for tourists!
Highly ethical business practices. High moral values and integrity. Verifiable track record of previous accomplishments in government or business.
Increasing mobility using plans like "Complete Streets". Making public transportation available for all in getting around the city (shuttles); making it safe for biking; better recycling agenda (they're composting in San Francisco these days).
I'd like to see the City Manager riding his bike to work or walking to work and incorporate a plan to always include sidewalks and bike paths in infrastructure for existing and especially for new development.
Someone who will place traffic calming and safe streets as a top priority. We have virtually no traffic enforcement (60 mph on E 52nd, my street, is not uncommon and there is NO police enforcement).
We need to start making Savannah A Bike City friendly and make better changes for cyclists safety , so that we won't have another horrible accident like on BRAG again.
Commitment to transportation issues in traffic calming through downtown for pedestrians, bicycles, cars (speeding) and public transportation. Too many accidents, by any of these modes of transportation, are completely avoidable or at least able to be lessened by enforcement of existing laws or the development of prevention measures.
Focus on the planning, development and maintenance of complete streets.
Previous experience in a city with similar challenges would be ideal, along with a demonstrated ability to manage large public projects from start to finish.
He or she must be someone the city staff will respect and find good to work for. I guess this is having the skills that most employees like to see in their employer. The new City Manager should also have skills in delegating responsibility and giving credit to others for their successes.

*16 samples responses from the 230 received.

Appendix E

St. Johns County, FL Resolution Thanking CB&A for Its Outstanding Service

RESOLUTION NO. 2007-23/**A RESOLUTION OF THE COUNTY COMMISSION
OF ST. JOHNS COUNTY, FLORIDA, THANKING
COLIN BAENZIGER & ASSOCIATES FOR ITS
OUTSTANDING EFFORTS IN CONDUCTING THE
EXECUTIVE SEARCH FOR THE COUNTY'S NEW
ADMINISTRATOR; AND PROVIDING AN
EFFECTIVE DATE.**

WHEREAS, St. Johns County retained Colin Baenziger & Associates (CB&A) to identify and recommend strong candidates to be the County Administrator;

WHEREAS, CB&A's staff worked diligently to find and produce excellent candidates, and then provided the County Commission with comprehensive materials concerning the candidates' aptitude, experience, background, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and newspaper archives of these candidates; and

WHEREAS, CB&A's process was completely open, fair and unbiased and was extremely well received by the County Commission, county staff, the press, and the public; and

WHEREAS, the County Commission wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the county;

**NOW BE IT THEREFORE RESOLVED BY THE COUNTY COMMISSION OF
ST. JOHNS COUNTY, FLORIDA AS FOLLOWS:**

Section 1: Recitals. The preceding recitals are true and correct and are incorporated herein by this reference.


Section 2: Acknowledgement. The County Commission wishes to express its sincere appreciation and gratitude to Colin Baenziger & Associates for its outstanding work and effort in assisting the county in finding its County Administrator.

Section 3: Effective Date. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED by the Board of County Commissioners of St. Johns County, Florida, this 21 day of August, 2007.

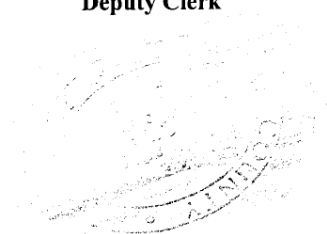
ATTEST: Cheryl Strickland, Clerk

**BOARD OF COUNTY COMMISSIONERS
ST. JOHNS COUNTY, FLORIDA**

By: 
Deputy Clerk

By: 
Ben Rich, Chairman

Rendition Date: 8/23/07



Appendix F

Comments from Dale Martin on CB&A's Vetting Process

Fernandina Observer™

A JOURNAL OF NEWS AND OPINION

Weekly comments from Dale Martin

By Dale Martin, City Manager, City of Fernandina Beach

March 18, 2016 1:00 a.m.

The vetting process employed by Mr. Colin Baenziger following my application to the City of Fernandina Beach was the most thorough review of my career, credentials, and references that I have ever experienced. In the months leading to my appointment here, I was interviewed in several other communities for similar City Manager positions. Despite getting to the interview stage in those communities, none of my references ever indicated to me that they had been contacted. As part of the selection process here, I was required to provide an exhaustive list of references, some very specific, such as my current Town Attorney, auditor, Chamber of Commerce, etc. To the best of my knowledge, every single reference provided was contacted.

The historic information provided to the City Commission for each candidate was extensive. Reading through the older newspaper articles rekindled so many memories- the personalities and issues from earlier days illustrate some peaks and valleys over the past twenty years. It has been a wonderful ride.

Note: Mr. Martin reminisces about his career for the remainder of the article. The full article can be found at:

<http://fernandinaobserver.com/2016/03/18/weekly-comments-from-dale-martin-5/#more-65218>



**CITY OF BELLE ISLE, FLORIDA
CITY COUNCIL AGENDA ITEM COVER SHEET**

Meeting Date: March 7, 2023

To: Honorable Mayor and City Council Members

From: B. Francis, City Manager

Subject: Candidates for Interim CM Position

Background: The list of candidates will be provided under a separate cover on Monday, March 6 after the noon deadline.

Staff Recommendation: None

Suggested Motion: None

Alternatives: None

Fiscal Impact: Depends on negotiations with the interim

Attachments: None

City of Belle Isle, Florida
Planning Services for Comprehensive Plan Update
Technical Proposal, Comprehensive Plan
RFP #23-04

February 9, 2023



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COST ESTIMATE

The RVI Team anticipates completing this work in a phased approach across two (2) fiscal years. This approach will be proposed and finalized during contract negotiations. The first phase for the initial \$77,500 will be sufficient to deliver recommendations for plan updates based upon a comprehensive assessment of the adopted plan; conducting a community workshop; and preparing a complete draft comprehensive plan update (including any map change).

The second phase will consist of finalizing the plan update, public hearings for transmittal and adoption, as well as required coordination with the Department of Economic Opportunity and state agencies. As outlined below, we anticipate completing the second phase for an additional \$39,000.

TASK NO.	TASK NAME	EST. TIMEFRAME	FISCAL YEAR	Totals
1	Project Initiation/Background Research	March – May 2023	FY 2022-2023	\$15,000
2	Assessment Report	June - July 2023	FY 2022-2023	\$5,000
3	Community Workshop	July 2023	FY 2022-2023	\$12,500
4	Draft Text & Map Amendments	July – October 2023	FY 2022-2023	\$45,000
5	Finalize Text & Map Amendments	October 2023 – December 2024	FY 2023-2024	\$18,500
6	Public Hearings	December 2023 – February 2024	FY 2023-2024	\$15,500
7	DEO Coordination	December 2023- January 2024	FY 2023-2024	\$5,000
TOTAL				\$116,500

February 9, 2023



Raquel Lozano
City Planner
City of Belle Isle
1600 Nela Avenue
Belle Isle, FL32809

RE: Planning Services for Comprehensive Plan Update, RFP #23-04

Dear Members of the Selection Committee:

On behalf of **RVi Planning + Landscape Architecture** (RVi), and our team, including Fisher Planning & Development Services and Applied Ecology, Inc. , we are pleased to submit this proposal for preparation of the City of Belle Isle's Comprehensive Plan Update.

RVi is a national team of planners, urban designers and landscape architects with five offices in Florida, along with offices in Texas, Arizona, Georgia, North Carolina, and Colorado. With more than 40 years of firm experience, our interdisciplinary staff have provided municipalities across Florida and the nation with comprehensive planning, community engagement and urban design services, with work spanning a range of project scales for our public clients.

The contract will be managed by Alexis Crespo, AICP, our Vice President of Planning in Florida. With more than 18 years of experience in Planning and Land Use Policy in Florida, Alexis brings a wealth of expertise in Comprehensive Planning, including Evaluation and Appraisal Reports, Comprehensive Plan re-writes, Land Development Code preparation and updates, stakeholder engagement and more.

RVi currently holds continuing service contracts for Planning and/or Landscape Architecture with 11 municipalities or institutions in Florida, and has updated three (3) Comprehensive Plans to reflect changes to the community's vision and consistency with rapidly changing state law within the last three (3) years. We have the demonstrated experience with the scope of work outlined by the City to efficiently and successfully complete this project.

Fisher Planning & Development Services' April Fisher, AICP, is an integral component to our Team and provides an unmatched understanding of the City of Belle Isle preparing this plan update. April served as the planning consultant for the City for seven years and understands the intricacies of the City's Comprehensive Plan, as well as the City's process, procedures, and needs. She has also prepared comprehensive plan updates for other jurisdictions throughout Central Florida. Her local knowledge, paired with RVi's depth of experience in preparing local Comprehensive Plans, provides the City with a Consultant that can hit the ground running and ensure a successful project.

Applied Ecology, Inc. led by Dr. Claudia Listopad, regularly assists municipalities in environmental assessments, regulatory and policy framework design, and statistical analyses with strong focus on water quality. Currently, AEI is assisting Orange County with two critical wetland studies: the State of the Wetlands and the Wetland Ordinance and Regulatory Framework Update. Wetland systems county-wide from 1990 to present day were analyzed to form conclusions on the success of Orange County's wetland ordinance and the results are being used to update the ordinance to address regulatory and management shortcomings that prove both unprotective of wetlands and cause unreasonable roadblocks to commonsense economic growth. Additionally, AEI has worked with both the City of Orlando and Orange County performing water quality studies and wetland assessments associated with water quality improvement projects. Applied Ecology will provide environmental policy analysis and support to address the City's unique natural resources centered around Lake Conway.

PLANNING IS A TEAM SPORT

- We understand that successful Planning and Urban Design is a collaborative effort, and we value a close partnership with the City, community and stakeholders. RVi relies on team members to bring their respective subject matter expertise, and our partners will complement RVi's experience and bring a unique skill set and local knowledge to the team.
- We have teamed with April Fisher, of Fisher Planning & Development services and Applied Ecology, Inc. to provide the City with an unmatched team of local experts.
- We care about the communities we work in, and it shows through our proactive and context-sensitive approach to public outreach and engagement.

WHY RVi

- We have a deep understanding of the City's needs and have the experience required for this contract, based on successful completion of similar projects for other municipalities in recent years;
- We've assembled a talented team of local experts to help support each assignment, and a proven history of assisting local governments as a seamless extension of Staff for successful completion of complex projects;
- We understand how to deliver top-rate services and customer service within the tight budgets of a municipality.
- We have no conflicting private sector work in the City that would present a conflict to support the City in this project;
- We understand the importance of listening and working in collaboration with the City and community members;
- We believe in the power of storytelling and strong graphics when presenting our ideas to the public, and incorporate graphics into our policy and regulatory work product to engage the reader and make complex documents more accessible to the general public;

We invite you to read our enclosed proposal and statement of qualifications and look forward to working closely with the City to provide professional planning services for the Comprehensive Plan Update.

Sincerely,

RVi Planning + Landscape Architecture



Alexis Crespo, AICP, LEED AP
Vice President of Planning
acrespo@rviplanning.com
239.850.8525



Alexis Crespo, AICP, LEED® AP
Vice President of Planning
acrespo@rviplanning.com

111 N Magnolia Ave, Suite 1350
Orlando, FL 32801
www.rviplanning.com

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Cost Proposal Submitted in seperate sealed envelope


A. Proposal Form - Section IX

IX. Form of Proposal

Planning Services to Complete a Comprehensive Plan
City of Belle Isle, Florida

The undersigned, being a duly authorized officer of the organization listed below, does hereby submit this proposal for Planning Services, under all terms and conditions (except those noted) as specified in the City of Belle Isle Request for Planning Services to Complete a Comprehensive Plan.

All information requested in Section IV, Proposed Content, is included in this proposal for planning services for the City’s consideration.

Respectfully submitted by: 

Name (Typed): Alexis Crespo

Position: Vice President of Planning

Company or Organization: RVi Planning + Landscape Architecture

Address: 111 N. Magnolia Avenue, Suite 1350

Orlando, FL 32801

Telephone Number: 407.680.0650

Email Address: acrespo@rviplanning.com

B. Executive Summary

EXECUTIVE SUMMARY OF PROPOSED SERVICES

The RVi Team has served communities throughout Florida on a variety of planning projects including several, recent Comprehensive Plan Updates. We believe that creating a healthy community takes a great understanding of the big picture and an appreciation for the details. We also pride ourselves on knowing how to create practical and straightforward policies and plans that achieve the goals of City leadership, as well as the general public. Coupled with the exceptional local knowledge and comprehensive planning experience of Fisher Planning and Development Services, and environmental policy specialists at Applied Ecology, Inc., we are excited for the opportunity to work with the City of Belle Isle on this important project.

RVi (formerly Waldrop Engineering) has a successful record of delivering quality outcomes for local governments. For example, our team recently partnered to assist the City of Bonita Springs with the Evaluation and Appraisal Report (EAR) of their outdated 2009 Comprehensive Plan, as well as the preparation of a series of comprehensive plan updates. The updates include plan amendments due to changes in state law and implementation of their multi-modal transportation vision plans. In addition, the updates address resiliency and low impact development policy relating to water quality and native habitat protection, which we understand are key interests of the City due to their unique context situated on Lake Conway and Little Lake Conway. These changes will bolster the City's ongoing efforts to protect the environment, including the City's tree canopy, as well as focus on protection of the City's lake systems to ensure they are pristine for generations to come.

As a small community approaching build-out, the focus of the Belle Isle Comprehensive Plan Update effort is not targeted on guiding new development, but rather, the RVi Team recognizes the opportunities of the Comprehensive Plan Update to manage growth pressures, guide neighborhood protection, enhance quality of life, and in some instances the redevelopment that may occur. Our approach will incorporate innovative planning tools to ensure the community remains livable — including multi-modal transportation infrastructure, integrated land use patterns and environmental resiliency measures. Our Team understands what changes can be made relating to growth management while ensuring private property right laws are upheld. We look forward to assisting the City in achieving this balance as part of the Plan Update process.

Drawing from RVi's past involvement and success with similar work will be beneficial to create a series of goal-



setting workshops with City staff, and where appropriate key decision makers, to help to identify core issues impacting the City. Through our team approach we understand the challenges facing due to growth pressures stemming from unprecedented population increases across the State and certainly in the Central Florida area. We understand the City's commitment to preserving the character of this community as a special lakefront enclave amidst the urban and growing form of development in the City of Orlando and Orange County.

Our team comfortably navigates controversial topics and we believe that open and honest engagement helps resolve conflicting interests. Our public engagement efforts build trust and create the conditions for quality outcomes to emerge. Our team has the expertise and skills to deliver a practical and pragmatic Comprehensive Plan Update that incorporates the community's vision for the future and addresses the unique planning concerns for the City.

The following is RVi's targeted approach to this scope of work based upon our experience of the steps needed to undertake a holistic comprehensive plan update. The approach is also informed by the scope of work provided by the City.

KICK-OFF & COMMUNICATION

First, we believe a project's success is determined by the effectiveness of the project communication. Communication will begin immediately upon selection at the initial contract meeting. We will use this meeting to gain a detailed understanding of the City's project needs and expectations. This will be used to prepare a clear project plan, including a fee and schedule that meets the City's needs within the fiscal year budget.

After the project contract is executed, the RVi Team will set up and attend a project kick-off meeting with City staff. To ensure this is a productive meeting, we will perform preliminary research on the project and refine the project schedule to deliver at the meeting. The discussion will focus on exchange of relevant background information,

project schedule, and further fine tuning of project expectations. The project schedule will be updated throughout with special focus paid toward critical path items and target dates. This meeting will also be used to discuss the composition of and relationship with the Steering Committee, list key Staff and stakeholders to engage throughout the process, and map out specific roles as the project proceeds.

CITIZEN INPUT & ENGAGEMENT

A "clear and transparent" approach guides the RVi Team's efforts when undertaking public projects. In the context of Belle Isle, community engagement will be planned throughout the life of the project. We also understand budgetary limitations and will look to add value through the community outreach process, while limiting cost intensive meetings for the consultant team, staff the City Council.

The Consultant Team proposes to host one (1) community workshop prior to public hearings for the plan transmittal and adoption to garner public feedback and educate the citizenry on the intent of the plan update. We have a team of over 15 planners available to ensure the meeting is well-staffed and citizens get their questions answered as well as contact information to stay involved throughout the process. We also typically work with the City to develop a webpage dedicated to the project, where the public can readily access draft documents, once available for public consumption upon Staff review, as well as project timeline and updates.

Following the workshop, the community will have a minimum of three (3) public hearings before the Planning & Zoning Board and City Council to comment on the plan and provide input via the state required transmittal and adoption process. The proposed budget also provides flexibility for additional City Council/Planning & Zoning Board workshops if necessary to vet plan elements.

In addition to public workshops, the consultant team will conduct smaller, focused meetings with the Steering Committee as identified with staff during the initial

kick-off meeting. While we are flexible as to the timing and regularity of the Steering Committee meetings, we propose a regular quarterly or bi-monthly (every other month) gathering over the lifetime of the project. We intend to partner with the Steering Committee by collaborating on project timing, public meeting and facilitation, draft concepts, draft language, and support for final adoption. As representatives of the City Staff, the Steering Committee will have a special role in identifying potential issues.

RVi also has extensive experience preparing and conducting community surveys tools to incorporate public feedback. Survey data is useful for supplementing the feedback from the community and provides additional opportunities for input. RVi executes surveys in a cost-effective manner and can gain broader input when compared with conducting community meetings without surveys. Our team proposes to conduct an online community survey as part of this scope of work. To ensure the broadest input possible, the survey will be posted online, broadly distributed electronically and available at the appropriate public workshops.

Lastly, our team understands that community outreach must be based on inclusion. Our team includes several Spanish-speaking planners to ensure we can communicate effectively with the City's diverse population.

EVALUATION & ASSESSMENT OF CURRENT PLAN

Our Team is experienced in the review and analysis of Comprehensive Plans as part of state-mandated Evaluation and Appraisal Reports completed for multiple jurisdictions including the Cities of Bonita Springs, LaBelle and Marco Island, as well as Hendry County. We are adept at quickly and thoroughly understanding where updates are needed to ensure conformance with Florida Statutes. This is particularly important to this project, as significant updates to the City's Comprehensive Plan have not been undertaken since the passage of the 2011 Community Planning Act. It is evident based upon our initial review of the Comprehensive Plan that many of the policies relating to future land use and concurrency no longer comply with the Florida Statutes, which can be readily addressed through this process.

This step of the project will also include our team's evaluation of other adopted studies and plans to determine where references need to be incorporated into the Comprehensive Plan, and where information can be removed to simplify the document and make it more user-friendly for the general public.

The final deliverable of this step in the process is an



"Assessment Report" outlining the changed conditions since the last Plan was adopted, including population changes, demographic shifts and a thorough analysis of land use. The Report will also include a Chapter-by-Chapter review of the adopted Elements and their supportive goals, objectives and policies, and summary of recommendation for the Updated Comprehensive Plan. We will use a format that provides a conceptual road map for proposed changes that will be accessible to the Council, Staff and public.

DRAFT COMPREHENSIVE PLAN AMENDMENTS & MAP/GRAPHIC UPDATES

Following delivery and acceptance of the Assessment Report by Staff and City, the Team will begin drafting the elements based upon the agreed upon strategy. This will help eliminate potential confusion as the project proceeds, and it will ensure the City is comfortable with the direction of the update. Through the drafting process it is anticipated that the RVi Team will work closely with the Staff and Steering Committee.

As preliminary draft work products and deliverables are developed, we propose to have meetings with Staff early on to gain initial input, vet proposed policy and regulatory solutions based upon Staff's in-depth institutional knowledge and identify modifications or updates. This will help expedite Staff's final review and reduce the project timeline overall.

As noted in our professional bios included in this proposal, our Team includes several experienced planners with the depth and breadth to take on a re-write of this scale in a seamless and collaborative manner. The team will be provided assigned elements and deadlines. This is communicated to Staff through the working Project Schedule to ensure the project proceeds in a timely manner and the City's expectations are met.

FINALIZE COMPREHENSIVE PLAN AMENDMENTS & MAP GRAPHIC UPDATES

Following Staff, Steering Committee and community review of the draft Updated Comprehensive Plan, the Team will prepare the final document, including all required maps, data and analysis for transmittal to the Department of Economic Opportunity. The Team will also prepare a supplementary Staff Report to accompany the document and clearly explain the Plan's compliance with Florida Statutes.



PUBLIC HEARINGS & FORUMS

The RVi Team also understands the importance of delivering clear information to decision-makers. We have extensive experience working with elected officials, advisory committees, stakeholders, and members of the public to ensure project approval. We are adept at presenting complex materials and responding to questions and comments in the public hearing forum. The Team relies heavily on early engagement with the community to build consensus for the Plan before it arrives at the City for a formal vote. The RVi Team will also prepare a concise staff report outlining the key plan elements in the City's desired template/format for ease of review of the update.

DEO COORDINATION

Coordination with state agencies via the Department of Economic Opportunity is a required step in a comprehensive plan amendment process. The RVi Team regularly interfaces with the planners in Tallahassee and have good working relationships and lines of communication to troubleshoot any issues early on, and minimize recommended changes at the state level.

ADOPTION

Upon state review of the Comprehensive Plan Amendments, the Consultant Team will Respond to any comments received by the state agencies and make any necessary updates to the plan elements. Following the adoption of the Plan Update, a final version of the document in PDF and WORD format will be delivered to Staff to allow for administration of future updates. Additionally, all GIS maps will be delivered with the appropriate shapefiles to support easy implementation of the plan by the City.

SUMMARY OF APPROACH

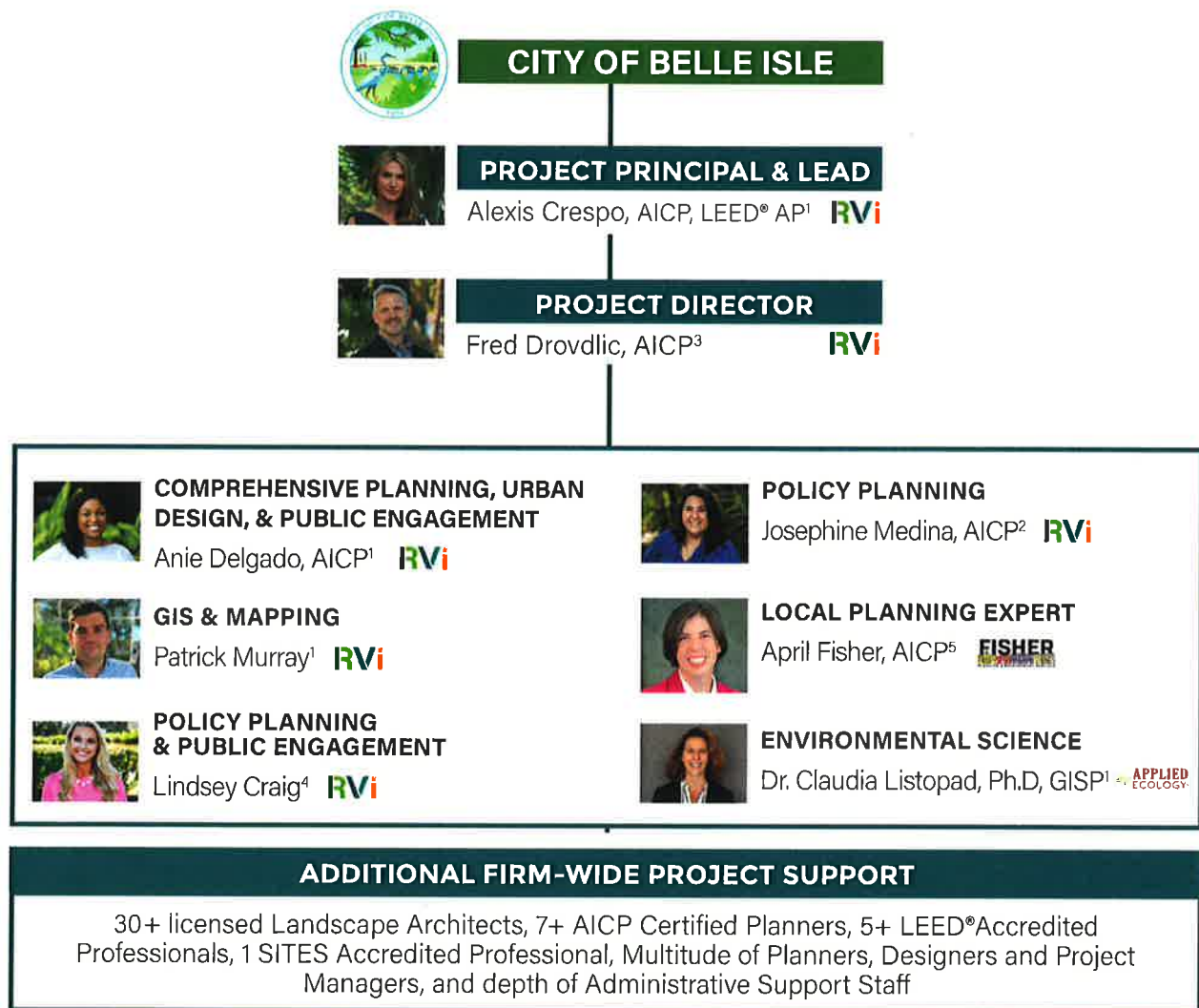
The result of our approach will be a practical, user-friendly, and community-based policy document that the City can easily use to implement its vision. The above approach is summarized in the Preliminary Work Plan/Schedule in Section E: Project Timeline.

C. Staffing Plan

TEAM ORGANIZATION CHART

Alexis Crespo, AICP will serve as the primary contact for the City, and will lead all efforts under this scope of work. Additionally, all work performed by RVi under this contract will be out of our Orlando, Tampa, Bonita Springs, and Fort Myers offices. We have the qualified personnel, depth of expertise, and support personnel within these offices to provide all the services required for this project. Additionally, we have teamed with **April Fisher** of Fisher Planning & Development services to provide local planning expertise. **April's experience serving as the planning consultant for the City of Belle Isle for seven years and expertise with the intricacies of the City's Comprehensive Plan, process, procedures, and needs is an invaluable asset for the success of this Comprehensive Plan Update.** Applied Ecology, Inc. will provide environmental policy analysis and support to address the City's unique natural resources centered around Lake Conway.

We understand the challenges our clients face in delivering planning services on tight budgets with limited staff. We pride ourselves on "right-sizing" our services to meet the needs of each client. Due to the breadth of our public sector planning experience, we're up to speed on recent legislative changes that require updates to local codes and comprehensive plans, and can analyze and make these changes efficiently and effectively.



Office Locations

¹ Orlando

² Bonita Springs

³ Fort Myers

⁴ Tampa

⁵ St. Cloud

ALEXIS CRESPO, AICP, LEED® AP

Project Principal & Lead | Vice President of Planning



Alexis offers a wealth professional planning experience in southwest Florida, and is certified with the American Institute of Certified Planners (AICP). She has led her planning staff in the successful completion of numerous privately initiated rezoning petitions, comprehensive plan amendments, annexations, variances, special exceptions, and other planning and zoning actions related to residential, commercial, institutional and mixed-use development. Alexis regularly assists local governments with the formulation of Land Development Code amendments, Comprehensive Plan updates and more. She also provides expert witness testimony and analysis relating to a variety of litigation matters.

EDUCATION

Ryerson University, Bachelor of Urban & Regional Planning

PROFESSIONAL LICENSURE

AICP Certified Planner
No. 022560

LEED® Accredited Professional

COMMUNITY INVOLVEMENT

American Planning Association,
past Chair of Promised Lands
Section

Florida Planning & Zoning
Association, past V.P. of
Financial Affairs, Board of
Governors

Urban Land Institute

Real Estate Investment Society

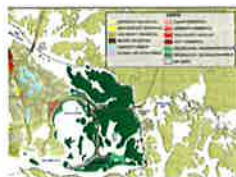
CLIENT REFERENCE

Daniel Smith, AICP
Director of Community Affairs
City of Marco Island, FL
239.389.5021
dsmith@cityofmarcoisland.com
Reference Project: Marco Island
Comprehensive Plan Update

ON A PERSONAL NOTE

An avid traveler and hiker, Alexis climbed Machu Picchu over four days and plans to take on Kilimanjaro.

SELECTED PROJECT EXPERIENCE



MARCO ISLAND COMPREHENSIVE PLAN UPDATE City of Marco Island, FL

Alexis served as Project Principal for the assessment and update of the City's Comprehensive Plan, last updated in 2009. She and her staff prepared an Assessment Report featuring policy analysis and updates corresponding with

required changes to sweeping state legislature. The report was completed within six months of contract and within the original budget. Following the completion of the assessment, Alexis and team conducted community outreach and prepared rewrites of all elements within the Comprehensive Plan, addressing community vision, demographic changes and emerging development trends. The Comprehensive Plan was drafted and adopted by City Council within a 10-month time frame.



COMPREHENSIVE PLAN & LDC UPDATES Bonita Springs, FL

Alexis has overseen her Planning staff's extensive work with the City since 2012 on a variety of projects aimed at updating its Comprehensive Plan and Land Development Code to reflect the City's vision for growth.

Work has included drafting and processing amendments to address strategic initiatives for beautification of main corridors, heightened design standards for intensive uses, and general amendments to facilitate implementation of the code's intent, where staff identified ambiguity in the existing regulations. Her team also successfully implemented supplementary standards for auto-oriented uses, such as car washes and service stations, "big box" retail, social services, "homeless shelters," and development standards for the US 41 Redevelopment Overlay District to guide future growth along that corridor. This included form-based code graphics, explanatory figures and vignettes, and site planning depictions to fully explain the language's intent.



GREATER PINE ISLAND COMMUNITY PLAN Lee County, FL

Alexis and staff prepared and processed Comprehensive Plan and LDC amendments tied to this Community Plan, which had been subject to numerous Bert Harris actions and required evaluation and updating to address legal

concerns. The solution balanced protection of private property rights with the community's vision for protection of the environment and rural character.

FRED DROVDLIC, AICP

Project Director | Director of Planning



Fred has been a certified planner with the American Institute of Certified Planners (AICP) since 1998 and has almost 20 years of experience in zoning, comprehensive plan writing and development consulting in both the public and private sectors. Additionally, he has served the development community by completing many privately initiated rezoning petitions relating to residential, commercial, institutional, and mixed-use development throughout the region. He brings a unique mix of team leadership, problem-solving and project management to each project, including a relatable nature with mature public presentation and community outreach and consensus building skills.

EDUCATION

University of Pittsburgh, Masters of Urban & Regional Planning

Ohio University, Bachelors of Business Administration – Economics

PROFESSIONAL LICENSURE

AICP Certified Planner
No. 014864

COMMUNITY INVOLVEMENT

American Planning Association

Florida Planning & Zoning Association

Urban Land Institute

Real Estate Investment Society

City of Fort Myers Board of (Zoning) Adjustments, past member

CLIENT REFERENCE

Daniel Smith, AICP
Director of Community Affairs
City of Marco Island, FL
239.389.5021
dsmith@cityofmarcoisland.com
Reference Project: Marco Island Comprehensive Plan Update

ON A PERSONAL NOTE

Fred enjoys woodworking as a hobby, is learning how to build furniture and has already crafted his own cabinets, shelving and a table from scratch.

SELECTED PROJECT EXPERIENCE



MONTURA RANCH ESTATES LAND USE STUDY Hendry County, FL

Fred served as Planning Team Leader for the Land Use Study and development of Comprehensive Plan and Land Development Code amendments for the 17-square-mile, pre-platted community in the County known as

Montura Ranch Estates. The purpose was to improve land use regulations within the community and ensure the long-term build-out occurs in a manner that protects public health, safety and welfare. The process involved the preparation and execution of an assessment report, policy and code recommendations, and a robust community outreach plan, including a series of outreach meetings, charettes and a community-wide planning survey.



MARCO ISLAND COMPREHENSIVE PLAN UPDATE Marco Island, FL

In partnership with Florida Gulf Coast University, Fred led the full assessment and update of the City's Comprehensive Plan update, a two-year process that began in summer of 2020. Fred and his team acted

as lead consultant in preparing the Assessment Report to recommend policy updates, led virtual town hall meetings, and prepared the plan's rewrites. The final draft was adopted by Council within 10 months.



CITY OF FORT MYERS LAND DEVELOPMENT CODE City of Fort Myers, FL

Fred oversaw the work by his planning staff, which has been contracted to amend seven different chapters of the City's Land Development Code since 2017. These amendments include updates to implement "complete

streets" provisions, landscape and corridor standards, modernization of parking regulations, and a total rewrite of the sign ordinance to bring it into legal compliance with recent court cases. Most recently, RVI's scope was further expanded to include updates to the Administrative Code, including consolidation of all boards and decision-making bodies, and a new Food Truck ordinance.

ANIE DELGADO, AICP

Comprehensive Planning, Urban Design, & Public Engagement | Project Director



Anie is a nationally-certified Planner with experience and accomplishments in land master planning, concept design, regional planning, transportation planning, architectural visualization, site analysis, feasibility studies and facility programming. She is adept at managing complex planning studies and development applications, including Comprehensive Plan amendments, rezoning, entitlements, annexations, site plans and plats. Anie is passionate about providing a voice for stakeholders that represent our most vulnerable populations. She advocates for people-centric design that is walkable, inspiring, inclusive and safe for all users.

SELECTED PROJECT EXPERIENCE

EDUCATION

Florida Atlantic University,
Master of Urban & Regional
Planning

University of Florida, Bachelor of
Design in Architecture

PROFESSIONAL LICENSURE

AICP Certified Urban Planner,
No. 31020

COMMUNITY INVOLVEMENT

CREW Orlando

City of Orlando Board of Zoning
Adjustment, Member

CLIENT REFERENCE

Paul A. Federico, MBA
President
Sterling Group Corp
905.669.8399
pfederico@sterlinggroupcorp.com
Reference Projects: Mill Slough
Road, Lake Lizzie, and Mascotte

ON A PERSONAL NOTE

Anie speaks four languages including English, French, Haitian Creole, and Spanish. She also enjoys Latin dance and baking in her spare time.



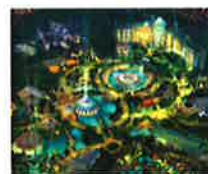
OAKS OF KISSIMMEE GOLF COURSE REDEVELOPMENT Osceola County, FL

As Planning Project Director, Anie has led the process since 2020 of applying to amend an existing PD to redevelop 107 acres of this golf course with a mix of new residential development, which is surrounded by a master-planned residential community that dates back to the 1980's. Her work has involved preparing submittal documents and serving as client liaison to County staff, coordinating a diverse team of consultants, and facilitating a stakeholder group for residents of the existing community to share input on the master plan revisions. Anie also led the creation of a project website as an avenue to quickly and accurately communicate project-related information to the public and facilitated an in-person community workshop to gather additional project feedback and spark creative discussion.



BICYCLE AND PEDESTRIAN PLAN & MAPS * City of Boca Raton, FL

Anie served as a Transportation Analyst and Grant Applications Coordinator for the City (2017-18), and helped the City to earn Bronze status with the League of American Bicyclists, which is based on the number of bicycle-friendly pathways and businesses within a municipality. She analyzed the entire bicycle network within the city to help bicyclists pick the safest route, produced that data in map form, and printed and distributed it throughout the community. Anie also was the City's liaison to the bicycle-pedestrian citizen advisory board to provide ideas for additional bicycle facilities and ways to improve safety. She also found grant funding for bicycle fix-it stations and racks to be placed throughout the city.



EPIC UNIVERSE THEME PARK - MASTER PLANNING* Orange County, FL

Anie served as an in-house Master Planner while with Universal Creative (2018-20), and carried out studies regarding new parcels in Orange County to determine yields and connectivity, produced visual intrusion studies and berm design surrounding the future Epic Universe site, produced a study to connect Universal Orlando's north campus parks to the Epic Universe site, led overall master planning of lands within the future park, and collaborated with architecture and landscape architecture teams to develop an interior network of pathways within the theme park. She also produced RFQ document and preliminary yield study for Universal's 1,000-unit mixed-income "Housing for Tomorrow" initiative, which launched in the fall of 2020. Beyond the Epic Universe project, Anie provided planning support to Universal's Global Real Estate team through site analysis and feasibility studies.

* indicates experience prior to joining RVI

JOSEPHINE MEDINA, AICP, LEED® GA

Policy Planning | Project Manager



Josephine has been a certified planner with the American Institute of Certified Planners (AICP) since the fall of 2021, and has more than seven years of experience in land use analysis, site plan review, comprehensive plan review, land development code compliance, planning project research, writing of technical reports, and stakeholder engagement for both the public and private sectors.

A native and fluent speaker of Spanish, she spent the first six and a half years of her career working as a Planner for municipalities across south Florida, including Collier County and the Collier Metropolitan Planning Organization (MPO).

EDUCATION

University of Florida, Bachelors
in Agriculture Operations
Management

University of Florida, Master of
Urban and Regional Planning (in
progress)

PROFESSIONAL LICENSURE

AICP Certified Planner No. 33747

COMMUNITY INVOLVEMENT

American Planning Association

Young Professionals of Naples

CLIENT REFERENCE

Michele R. Mosca, AICP
Planner III
Collier County
239.252.2466
Michelle.Mosca@colliercountyfl.gov
Reference Project: Past
Employment with Collier County

ON A PERSONAL NOTE

Josephine is a "Canine Coach" for her local Humane Society, helping to teach dogs social skills with people and other animals to help prepare them for adoption.

SELECTED PROJECT EXPERIENCE



ZONING ADMINISTRATION & REVIEW

City of LaBelle, FL

Josephine assists with the day-to-day tasks that come from RVI serving as a contracted extension of Planning staff for the City. She replies to preliminary questions that come from the public regarding land development and zoning, and assists with the "Planner on Call" role. RVI reviews

and processes all planning and zoning applications submitted to the City, and provides presentations of all applications requiring public hearing to the City Commission and advisory boards. She also updates the zoning and future land use map GIS Database.



COMMUNITY PLANNING, ZONING ADMIN & REVIEW*

Collier County, FL

Josephine served the County by replying to preliminary questions that came from the public relating to the County's Growth Management Plan and Land Development Code. She reviewed Growth Management Plan amendments and Zoning petitions submitted to the County, and provided

technical reports and presentations to the Local Planning Agency. She assisted in facilitation of community development and vision meetings, and provided review and recommendation for special area plan amendments, such as Immokalee Area Master Plan, Rural Fringe Mixed-Use District Re-Study, and Rural Lands Stewardship Area Re-Study.



COMPREHENSIVE PLANNING & ZONING REVIEW*

Henry County, GA

Josephine provided day-to-day tasks as Planning staff for the County, cities of Stockbridge and Hampton as part of a planning services inter-local agreement. She replied to preliminary questions from the public regarding land development and zoning, and filled the "Planner on

Call" role. She reviewed planning and zoning applications submitted to the municipalities, provided technical reports and presentations of variances, special exceptions, rezonings and amendments that required public hearing.

* Indicates experience prior to joining RVI

PATRICK MURRAY

GIS & Mapping | Planner



Patrick specializes in geospatial information and land use planning. Over the past five years his GIS experience has assisted several municipal planning and growth management departments prepare for future development. In addition to providing geospatial analysis on growth, he enjoys creating interactive web map applications that provide valuable and insightful information for better decision making.

As Planner/GIS Analyst, Patrick regularly works on comprehensive planning for local municipalities including future land use map updates and data analyses, density studies, and policy updates. Patrick also prepares Land Development Code updates for municipal clients focused on modernizing local regulations, including parking requirements, PUD ordinances, and subdivision standards.

EDUCATION

Florida State University, B.S. in Geography

Florida State College at Jacksonville, GIS Technical Certificate

COMMUNITY INVOLVEMENT
Central Florida GIS Workshop, Member

Greater Orlando Builders Association

Northeast Florida Map Info User Group, Member

CLIENT REFERENCE

Debbie Willis
GIS Analyst
St. Johns County Growth Management
904.209.0609
dwillis@sjcfl.us
Reference Project: GIS Growth Management Support

ON A PERSONAL NOTE

One of Patrick's many hobbies includes baking and cooking.

SELECTED PROJECT EXPERIENCE



FUTURE LAND USE ANALYSIS Hendry County, FL

Patrick serves as GIS Planner at RVI, and while under a continuing services contract with the County he has assisted the Community Planning Department to evaluate where future land use categories are currently established, where there is more opportunity for projected growth, and how the community can evolve in analyzing their current future land use elements and apply them elsewhere throughout the County. For example, analysis shows nearly 70 percent of County land is currently in agriculture. But the population growth projections are high, so RVI's GIS analysis is helping to justify the shift in future land use from agriculture to more residential and mixed-use.



GIS SUPPORT FOR GROWTH MANAGEMENT* St. Johns County, FL

Patrick served as GIS Technician for the Growth Management Department, and through GIS analysis and mapping helped calculate the land ownership and displayed that thematically within a geographic boundary. Color coding showed major land owners in the County. By understanding who the majority land owners are in certain areas and how much was owned by public versus private entities, this helped County staff better plan for additional growth within these target submarkets.



GIS SUPPORT FOR RESIDENTIAL GROWTH FORECAST* St. Johns County, FL

Patrick served as GIS Technician for the Growth Management Department, and assisted planners and decision-makers on evaluating where growth options could occur, and where approved residential housing is occurring but yet to be built. GIS maps help display visually the varying densities of growth that are forecast to occur. This information helped staff decide where future growth is appropriate and where current sprawl is occurring.

*Indicates experience prior to joining RVI

LINDSEY CRAIG

Urban Design & Public Engagement | Planner



Lindsey specializes in land use policy planning, and following more than three years as an intern with Orange County's Planning and Zoning departments she joined RVI in January 2022. She is experienced in the inner workings of local government, has assisted in coordinating public meetings, and produced research reports on Orange County's resiliency framework. Her role with RVI places Lindsey in the driver's seat of due diligence research for new projects, coordinating submittal packages for new projects, and writing narratives and legal justification for requests like Comprehensive Plan amendments, rezonings, future land use map changes, annexations and more.

EDUCATION

Univ. of Central Florida, Master's in City/Urban, Community and Regional Planning

Certificates in Emergency Management and Homeland Security (earned via Master's Degree program)

Univ. of Central Florida, Bachelor's in Public Administration

Valencia College, Associate of Arts - Architecture

COMMUNITY INVOLVEMENT

American Planning Association (APA), member

CLIENT REFERENCE

Lisette M. Egipciaco -
Orange County, FL
407.718.2744

Lisette.Egipciaco@ocfl.net
Reference Project: Past
Employment with Orange
County

ON A PERSONAL NOTE

Lindsey has participated in competitive Irish Dancing since age 7, and has traveled North America to 12 cities for professional Irish Dance competitions.

SELECTED PROJECT EXPERIENCE



TOLEDO VILLAGE City of North Port, FL

Lindsey has served as staff Planner on this 2,086-acre new master-planned community development, which is proposing up to 3,000 dwelling units across a mix of single-family housing and new golf course. Lindsey has coordinated materials for submittals to the City, including writing of the project narrative, and preparing text for Rezoning and Comprehensive Plan amendment applications.



COMPREHENSIVE PLAN UPDATE & REWRITE Hendry County, FL

Lindsey has assisted on this project by analyzing the Comprehensive Plan Future Land Use Context along with Zoning Districts from the Land Development Code. She organized and overlaid in Excel which Zoning Districts can be implemented under the current Future Land Use categories, based on density. She then analyzed each individual Future Land Use and Zoning District on maximum density, FAR, Range of Uses and Prohibited Uses. She also reviewed the most recent updates in Florida Statutes since 2018 to determine if they call for changes to the current Comprehensive Plan.



NEWPORT COMMUNITY Manatee County, FL

Lindsey has served as staff Planner on this 1,563-acre master-planned community development, which is proposing a mix of single-family residential across four land parcels. Lindsey has coordinated materials for submittal to the County, including writing applications, project narrative and legal justification, and coordinating with subconsultants for their work to support two PSPs and a new Planned Development zoning.

APRIL FISHER, AICP

Comprehensive Planning/Local Expert



April holds a Master of City and Regional Planning degree from Clemson University and has over 24 years of experience in urban and regional planning, providing services in both the public and private sectors. She is a member of the American Institute of Certified Planners (AICP), member number 128898.

SELECTED PROJECT EXPERIENCE**EDUCATION**

Clemson University, Master of City and Regional Planning

PROFESSIONAL LICENSURE

AICP Certified Planner No. 128898

CLIENT REFERENCE

Lance Johnson
City Manager
Destin, Florida
850.837.4242
ljohnson@cityofdestin.com
Reference Project: Expert Witness Testimony

COMPREHENSIVE PLAN UPDATE**City of Sanford, FL**

Subconsultant member of project team to update the city's comprehensive plan based on EAR amendments and consistency with state requirements. This included updating the housing and conservation elements to be consistent with the Future Land Use Element.

COMPREHENSIVE PLAN UPDATE**City of Edgewood, FL**

Lead subconsultant member of project team to update the city's comprehensive plan and map series. This project included public workshops and meeting with City Council to determine priorities and hold visioning sessions regarding the creation of mixed-use policies along major commercial corridors.

DR. CLAUDIA LISTOPAD, PH.D., GISP

Environmental Scientist/President

**EDUCATION**

Ph.D. in Conservation Biology, Applied Track, UCF

M.S. Ecology, Florida Tech

B.S. Ecology, Florida Tech

B.S. Marine Biology, Florida Tech

PROFESSIONAL LICENSURE

American Water Resources Association

Florida Stormwater Association

GIS Certification Institute Certified GIS Professional #91249

CLIENT REFERENCE

Tim Hull, MS, PWS
Environmental Programs Administrator
Orange County Environmental Protection
407-836-1428, tim.hull@ocfl.net

Dr. Claudia Listopad has 22 years of specialized experience in geospatial project management, remote sensing, and statistical analyses for resolving a multitude of environmental problems. As a trained marine biologist, ecologist, and conservation biologist, Dr. Listopad worked in the private consulting world for over eight years prior to founding Applied Ecology, Inc. Claudia Listopad has combined geospatial analyses and ENVI remote sensing skills with over six years of in-depth use of LiDAR for water resources and ecological studies. Her interest focuses on the application of cutting-edge remote sensing technology and advanced modeling to conservation and natural resource management.

Dr. Listopad specializes in the application of GIS, modeling, database development, statistical analyses, and remote sensing to complex data sets, particularly those related to stormwater, utilities, water resources, natural resources, and consumptive permitting. Since founding AEI, Dr. Listopad has provided stormwater, surface and groundwater quality monitoring, statistical analyses, and modeling services directly as a prime or subconsultant for Brevard County NRMD, City of Indian Harbour Beach, City of Cocoa Beach, City of Cape Canaveral, City of Titusville, City of Rockledge, City of Orlando and Orange County, and the US Air Force, among many others.

Dr. Listopad has been and is continuously involved in several projects funded by the State Legislature related to water quality of the Indian River Lagoon, including several groundwater source studies, which include large-scale monitoring, geospatial modeling, and statistical analyses. Additionally, she is actively involved in both the research and public consulting world for water resources. She presents at domestic and international conferences on a variety of ecological and remote sensing topics and participates in public workshops for water resources issues and their implementation.

D. References and Relevant Experience

REFERENCES & CONTACT INFORMATION

RVi encourages the City of Belle Isle to contact the following five RVi project references from Municipal clients for a description of our services and abilities to perform effectively on projects, both on time and within budget:

1. CITY OF LABELLE

GARY HULL, Superintendent of Public Works
481 West Hickpochee Avenue, LaBelle, FL 33935
ghull@citylabelle.com, 863.675.2872
Contract: 2018 — Present

Service Summary: RVi was engaged by the City to serve as their consulting City Planner in 2018 and has enjoyed a long-term working relationship since that time. As City Planner, RVi has been involved in the development of a comprehensive Community-Driven Economic Development Strategic Action Plan; Comprehensive Plan Updates; creation of supplementary regulations and procedural standards in the Land Development Code; and the day-to-day planning functions including application/permit review, pre-application meeting and planner-on-call duties, and monthly presentations to the City Commission and advisory boards. In this role, RVi has successfully worked through the Florida Land Use & Environmental Dispute Resolution Act (FLUEDRA) to avoid Bert Harris proceedings against the City.

Key Projects Include: the SR 80 Overlay supplementary regulations/design standards; significant oak tree ordinance; temporary use standards, and rewrite of review criteria for legislative and quasi-judicial land use applications. Most recently RVi has been engaged to provide updates to the City's Comprehensive Plan relating to the Outlying Mixed Use and Downtown Business District future land use categories.

2. CITY OF FORT MYERS

TONY PALERMO, Assistant Director
1825 Hendry Street, Fort Myers, FL 33901
apalermo@cityftmyers.com; 239.321.7926
Contract: 2017 — present

Service Summary: RVi was contracted to amend seven (7) different chapters of the City of Fort Myers Land Development Code (LDC) since late 2017. These amendments include updates to implement "complete streets" provisions, landscape and corridor standards, modernization of parking regulations, and a total rewrite of the sign ordinance to bring it into legal compliance with recent court cases.

Most recently, RVi's scope was further expanded to include updates to the Administrative Code, including consolidation of all boards and decision-making bodies, and a new Food Truck ordinance.

3. LEE COUNTY

RICHARD WESCH, County Attorney
2115 Second Street, Fort Myers, FL 33901
rwesch@leegov.com; 239.533.2236
Contract: 2014 — 2016

Service Summary: RVi (formerly Waldrop Engineering) was engaged by the Lee County Attorney's Office and Community Development Department for the preparation and processing of Lee Plan and Land Development Code (LDC) amendments relating to the Greater Pine Island Community Plan.

Originally adopted in 2003, the Community Plan was subject to numerous Bert Harris actions and required evaluation and updating to address legal concerns from numerous parties. The solution also needed to balance the protection of private property rights with the community's vision for environmental preservation, protection of rural character, and safe access to and from the island in the case of emergencies.

The resultant Comprehensive Plan and LDC amendments effectuated the desire of citizens to preserve Greater Pine Island's unique coastal rural character, while minimizing legal liability results from the existing policies and land use regulations. While highly controversial at the project outset, the changes were ultimately supported by Pine Island residents and stakeholders, as well as the development community.

REFERENCES & CONTACT INFORMATION

4. CITY OF BONITA SPRINGS

ARLEEN HUNTER, City Manager
9101 Bonita Beach Road, Bonita Springs, FL 34135
arleen.hunter@cityofbonitasprings.org; 239.949.6262
Contract: 2011 — 2018

Service Summary: RVi has worked with the City of Bonita Springs since 2012 on a variety of projects aimed at updating the Comprehensive Plan and Land Development Code to reflect the City's vision for growth.

Work has included drafting and processing amendments to address strategic initiatives for beautification of main corridors, heightened design standards for intensive uses, and general amendments to facilitate implementation of the code's intent, where Staff identified ambiguity in the existing regulations.

Our team also successfully implemented supplementary standards for auto-oriented uses, such as car washes and service stations, "big box" retail, social services, homeless shelters, and development standards for the US 41 Redevelopment Overlay District to guide future growth along the corridor. Efforts included form-based code graphics, explanatory figures, and site planning depictions to fully explain the language's intent.

5. GLADES COUNTY

RICHARD PRINGLE, County Attorney
2125 First Street, Suite 200, Fort Myers, FL 33901
richard@strayhornandstrayhornlaw.com; 239.332.4717
Contract: 2012 — 2018

Service Summary: RVi staff (formerly Waldrop Engineering) assisted the Glades County Manager and County Attorney's office to re-write the County's Planned Development (PD) zoning district ordinance. The amendment was a high priority for the County Commission in order to provide a straight-forward zoning process and appropriate design standards for several large-scale Planned Developments in and around the area known as the Inter-modal Logistics Center, or "inland port". RVi staff identified issues with the implementation of the adopted language, as well as a lack of design standards and review criteria to ensure high-quality, well-integrated development patterns. We worked extensively with Staff and stakeholders to ensure the resulting regulations provided the requisite flexibility intended by the PD district, while creating heightened design standards, such as buffering, common open space areas, minimum setbacks, and allowances for mixed-use developments. The project, including public hearings, was completed in less than six months due to the time-sensitive nature of the amendments.

Our team also assisted the Planning Department with review of privately-initiated land use applications, including comprehensive plan amendments, rezonings, and special exceptions. In this role, we facilitated discussions with applicants, performed all functions of staff review, including staff report preparation, and presented the petitions to the Planning Board and Board of County Commissioners on behalf of Staff.

Additionally, Waldrop Engineering, Inc. in partnership with Florida Gulf Coast University, was retained in June 2018 to prepare the Glades County US-27 Corridor Utilities Study (Study). The purpose of the Study was to provide an assessment of existing conditions relating to Glades County's potable water and sanitary sewer infrastructure and provide recommendations for prioritized improvements and public investment based upon potential short-term and long-term development scenarios.

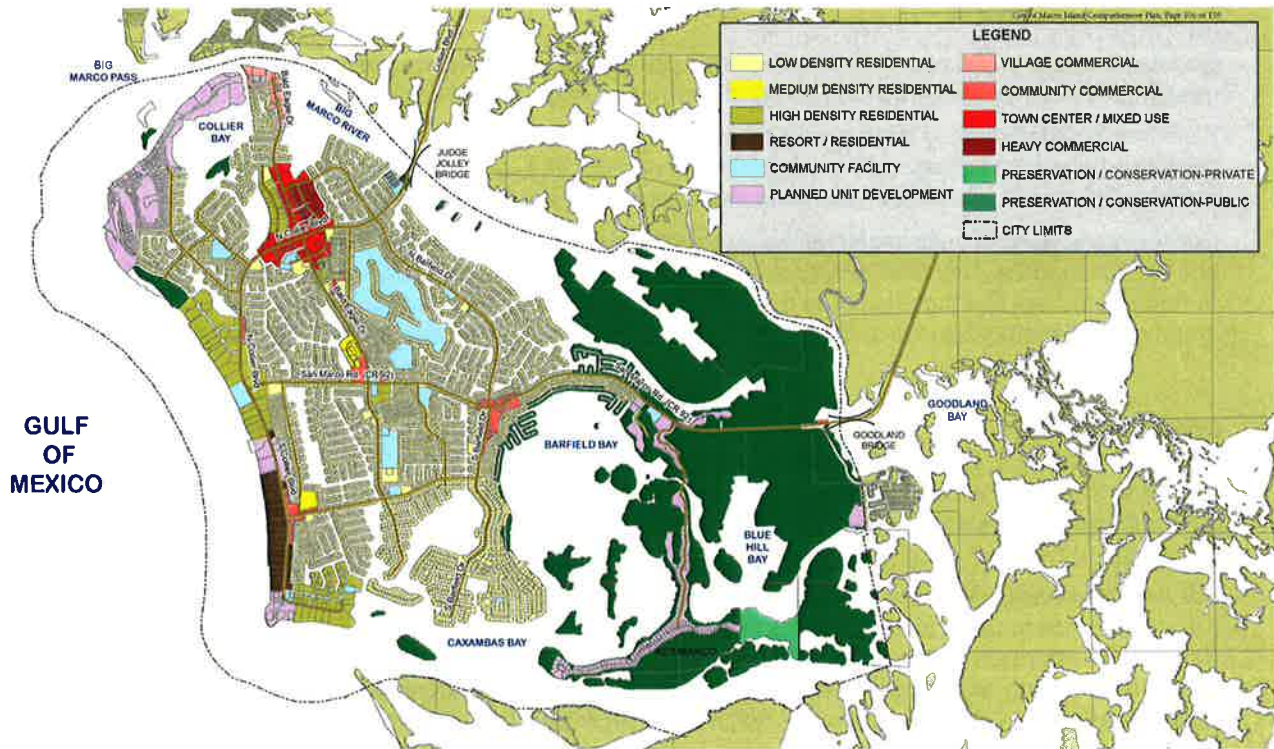
The consulting team examined the existing service area and capacities for centralized utility systems within a defined geographic boundary established with County Staff, and outlined three (3) likely development scenarios with cost estimates. The Study also incorporated public input obtained from landowners, stakeholders, and the community. The assessment was used by the County to help guide future decisions regarding infrastructure needs, investments in utility expansion projects, and land use planning, which will be closely tied to the timing of "catalyst" projects in the region, such as the Airglades Airport and America's Gateway Logistics Center. The study also assisted the County is seeking grant funding to offset improvement costs.

MARCO ISLAND COMPREHENSIVE PLAN UPDATE

CLIENT: City of Marco Island



Marco Island, FL



DATE

2019 - 2021

SCOPE

Policy Planning
Community Engagement

CONTACT PERSON

Daniel Smith, AICP
Director of Community Affairs
50 Bald Eagle Drive, Marco
Island, FL 34145
239.389.5021
dsmith@cityofmarcoisland.com

TEAM MEMBERS

Alexis Crespo, AICP, LEED AP
(Policy Planning Lead)
Fred Drovdic, AICP
Patrick Murray

PRIME/SUB

Prime

CONSULTANT COST

\$136,000

PROJECT DESCRIPTION

RVI's planning staff (formerly Waldrop Engineering), in conjunction with Florida Gulf Coast University (FGCU), was selected by the City of Marco Island to conduct a full assessment and update of their Comprehensive Plan which was last updated in 2009. The team acted as the lead consultant that prepared the Assessment Report outlining recommended policy updates to implement the City's vision, as well as changes required to comply with sweeping state legislative changes enacted over the past decade. The Assessment Report was completed within six months of contract execution and within the original budget.

RVI also conducted a series of in-person and "virtual" town hall meetings, most with more than 100 attendees, and crafted an online survey to garner early input from the public during the COVID-19 pandemic.

Following successful completion of the assessment, RVI prepared rewrites of all elements within the Comprehensive Plan to address the community vision, changes in demographics, as well as emerging redevelopment trends and growth pressures. The final Comprehensive Plan was drafted, curated with the community and ultimately adopted by City Council within a 10-month timeframe on time.

CITY OF LABELLE COMPREHENSIVE PLAN UPDATE

CLIENT: City of LaBelle

RVi
LaBelle, FL



DATE

2021 - present

SCOPE

Comprehensive Plan Update
Community Engagement

CONTACT PERSON

Gary Hull
Superintendent of Public Works
City of LaBelle
863.673.0948
ghull@citylabelle.com

TEAM MEMBERS

Alexis Crespo, AICP, LEED AP
(Policy Planning Lead)
Josephine Medina, AICP
Patrick Murray
Rhea Lopes

PRIME/SUB

Prime

CONSULTANT COST

\$100,000

PROJECT DESCRIPTION

RVi is undertaking a holistic update of the City's Comprehensive Plan to identify amendments required based upon changing conditions, land use patterns, infrastructure improvements, and demographic shifts.

This update was sparked by concern about neighborhood protection and infrastructure capacity to support unprecedented growth, which is not unique to LaBelle. RVi's Team has developed an incremental work plan to meet the City's limited budget for planning projects, and strategically works through Element updates that are most to least critical to the pending issues within the community.

The update will also address the sweeping legislative changes to Florida Statutes that significantly impact currently adopted policies. The project involves extensive community outreach, including workshops and a community-wide survey. The update is also focused on implementing the City's recently adopted Economic Development & Resiliency Plan, funded by Florida's Department of Economic Opportunity.

HENDRY COUNTY COMPREHENSIVE PLAN & LDC AMENDMENTS

CLIENT: Hendry County Government



Hendry County, FL



DATE

2018 – Present

SCOPE

Land Use / Policy Planning
Code Writing / Amendments
Overlay District Policy & Design
Comprehensive Plan
PUD Process Overhaul

CONTACT PERSON

Ryan Alexander
Associate County Planner
863.675.5241
ryanalexander@hendryfla.net

TEAM MEMBERS

Fred Drovdic, AICP
(Policy Planning Lead)
Alexis Crespo, AICP, LEED AP
Patrick Murray
Josephine Medina, AICP

PRIME/SUB

Prime

CONSULTANT COST

\$200,000

PROJECT DESCRIPTION

Hendry County has contracted with RVI to update, rewrite and amend various Comprehensive Plan and Land Development Code (LDC) elements to address specific issues, modernize code, improve processes and secure better long-term results of future development.

In 2019, the RVI team rewrote the Sign Ordinance to create a legally defensible, clear and easily administered code that is simple to use. In 2020, our team completed the adoption of a SR 80 Overlay, Affordable Housing/Bonus Density LDC and Comprehensive Plan amendments, Commercial Vehicles ordinance, Planned Unit Development process overhaul, and parking landscaping and lighting code amendments.

RVI has been responsible for writing, coordinating with County staff, presenting to stakeholders through community meetings (pictured above) and completing the adoption process.

ECONOMIC & DISASTER RESILIENCY PLAN

CLIENT: City of LaBelle



LaBelle, FL



DATE
2019

SCOPE
Economic Development &
Resiliency
Strategic Action Plan
Stakeholder Engagement

CONTACT PERSON
Gary Hull
Superintendent of Public Works
481 W Hickpochee Ave,
LaBelle, FL 33935
863.673.0948

TEAM MEMBERS
Alexis Crespo, AICP, LEED AP
(Policy Planning Lead)
Fred Drovdic, AICP

PRIME/SUB
Prime

CONSULTANT COST
\$42,000

PROJECT DESCRIPTION

The City was awarded a Department of Economic Opportunity Grant to assist with the development of a community-driven economic development strategy that could build upon the local strengths and assets of the City. This plan brought together information, resources and priorities that were not well-integrated in the City's existing plans and guiding documents. The scope broadly examined this rural community's economic development goals to form a strategic set of measurable targets to guide the City forward.

The final report provided the following components: Community vision relating to economic development; Inventory of existing conditions, assets, tools & infrastructure, including an asset mapping report; a summary of community-driven charette process and community feedback; a detailed summary of prioritized strategies for economic development; Timeline for action plan implementation; Regional partnerships and collaborative efforts; and Process and procedure for plan updates.

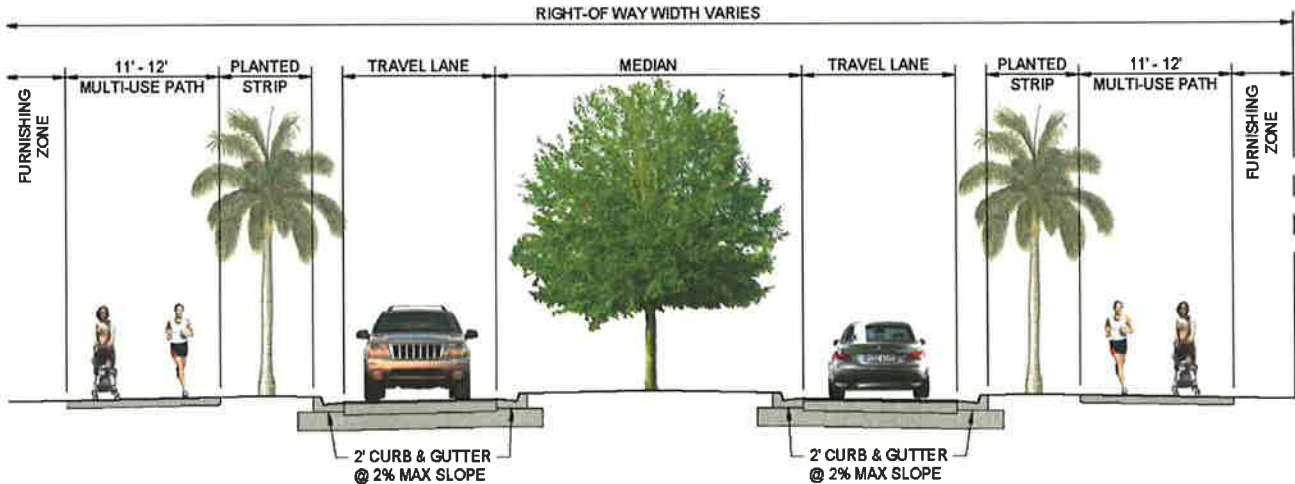
The process involved extensive community outreach and stakeholder coordination, including community survey, as well as coordination with City staff and departments.

BONITA SPRINGS COMP PLAN & LAND DEVELOPMENT CODE UPDATE



CLIENT: City of Bonita Springs

Bonita Springs, FL



DATE

2012 - 2018

SCOPE

Land Use & Policy Planning
Master Planning
Community Engagement
Expert Witness Testimony

CLIENT NAME

City of Bonita Springs

CONTACT PERSON

Arleen Hunter
City Manager
9101 Bonita Beach Road, Bonita
Springs, FL 34135
239.949.6262

TEAM MEMBERS

Alexis Crespo, AICP, LEED AP
(Policy Planning Lead)

PRIME/SUB
Prime

CONSULTANT COST

\$120,000 (scoped over
multiple contracts)

PROJECT DESCRIPTION

Starting in 2012, RVI (formerly Waldrop Engineering) was engaged by the City of Bonita Springs to work on a variety of projects relating to the City's Land Development Code, Comprehensive Plan and various visioning and corridor studies.

In partnership with Florida Gulf Coast University (FGCU), RVI assisted the City with the preparation of the Evaluation and Appraisal Report (EAR) to identify necessary updates to the City's Comprehensive Plan. Following a successful completion of the EAR, our team prepared both state-required and optional amendments to the Comprehensive Plan to implement the City's updated vision.

We also assisted in several corridor studies and the implementation of policy and land development code regulations, including the U.S. 41 Overlay District and the Bonita Beach Road Corridor Visioning Study. These efforts examined updates to the City's regulatory documents in order to modernize their approach to achieving multi-modal transportation facilities and well-integrated land use patterns.

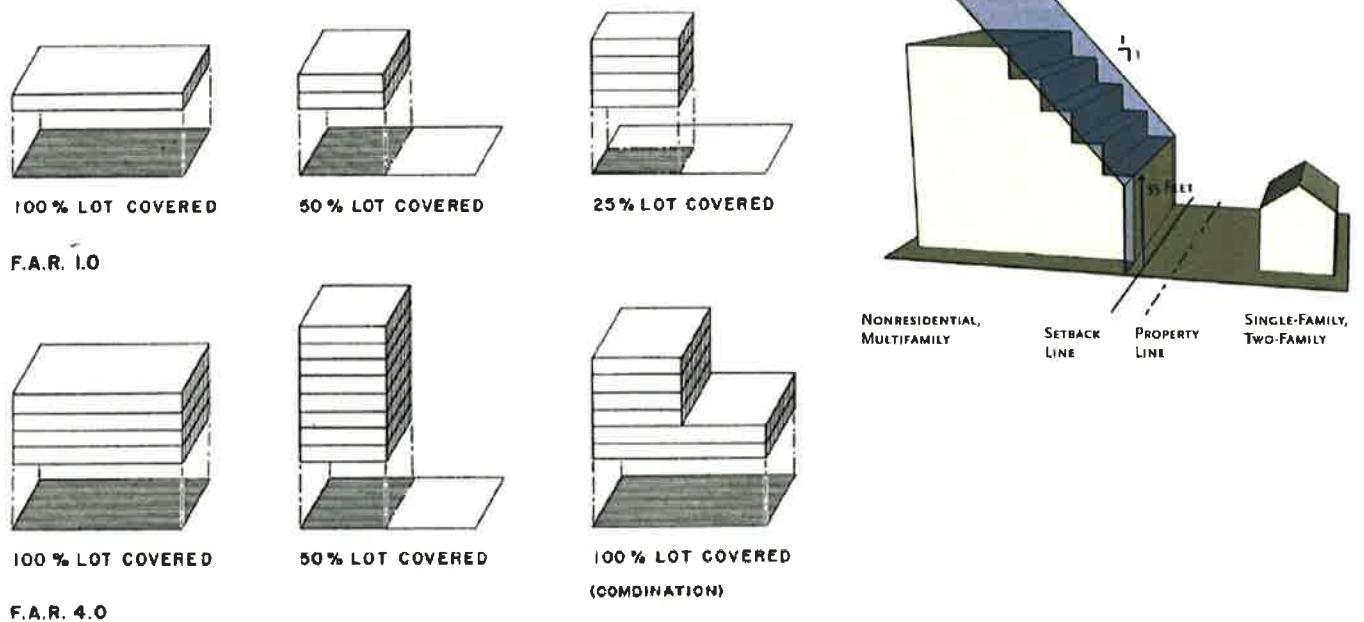
In addition, our planning staff prepared incremental LDC updates to address complete street standards, food trucks, big-box retail standards, building design standards and updates to the City's antiquated zoning districts and related permissible uses. All of these efforts included significant community engagement efforts, including public workshops, community-wide surveys and presentations at public hearings.

FORT MYERS LAND DEVELOPMENT CODE UPDATES

CLIENT: City of Fort Myers



Fort Myers, FL

**DATE**

2017 – Present

SCOPE

Land Use / Policy Planning
Code Writing
Sign Ordinance
Subdivision, Traffic/Parking, and
Definition Amendments

CONTACT PERSON

Steven Belden
Community Development
Director
2200 Second Street,
Fort Myers, FL 33901
239.321.7902

TEAM MEMBERS

Fred Drovdic, AICP
(Policy Planning Lead)
Alexis Crespo, AICP, LEED AP

PRIME/SUB

Prime

CONSULTANT COST

\$100,000

PROJECT DESCRIPTION

RVI's Planning staff was contracted to amend seven different chapters of the City of Fort Myers Land Development Code (LDC) since late 2017.

These amendments include updates to implement "complete streets" provisions, landscape and corridor standards, modernization of parking regulations, and a total rewrite of the sign ordinance to bring it into legal compliance with recent court cases.

Most recently RVI's scope was further expanded to include updates to the Administrative Code, including consolidation of all boards and decision-making bodies, and a new Food Truck ordinance.

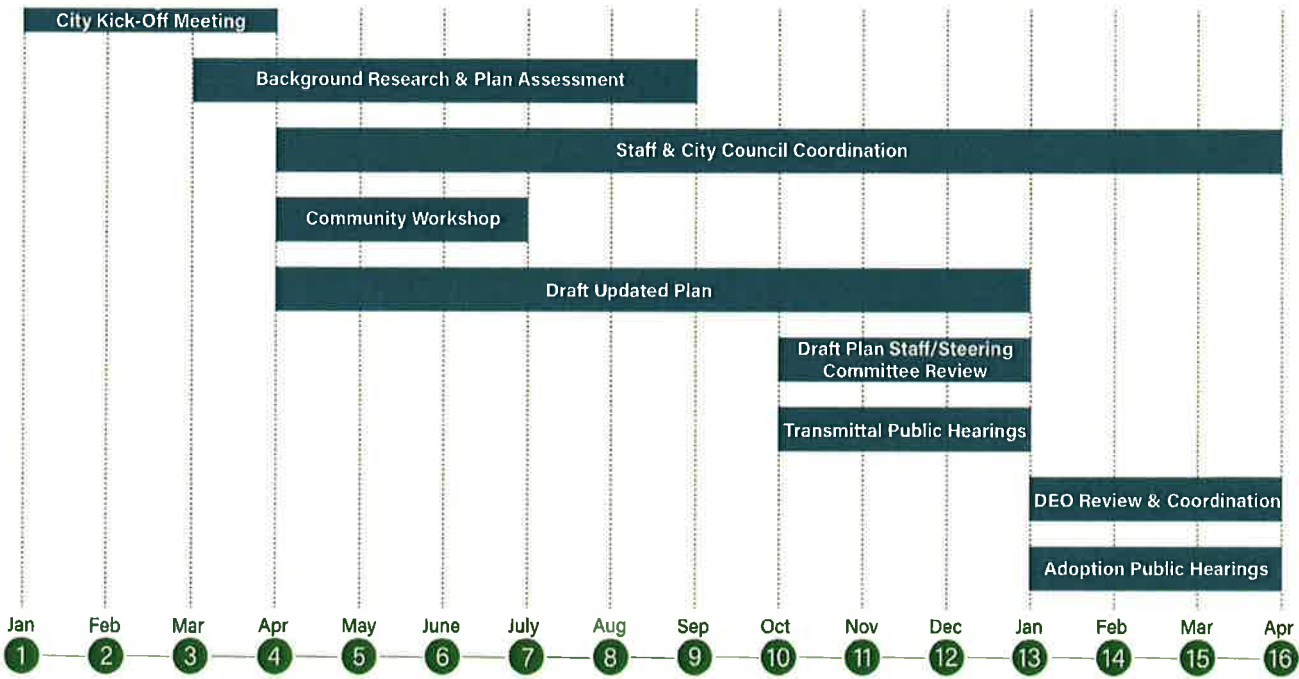
E. Project Timetable

PROJECT TIMETABLE

The RVi Team approach is summarized in the below Project Timetable. Our Team has completed similar Comprehensive Plan Updates in approximately 12-14 months' time and believe based upon our understanding of the City's goals with this project, the breadth of the existing plan, and extent of legislative updates, that we can complete this project in a similar 12-14 month timeframe.

RVi understands the importance of customer service and meeting deadlines, especially for local governments that have extensive internal deadlines for public advertisement and notification, legal review, and inter-departmental coordination. We enjoy an exceptional record of providing planning services to public sector clientele in a timely and efficient manner where deadlines are always met.

The Project Principal leads the assignment of personnel and resources for the project and coordinates the project's needs between RVi's Planning division and sub consultants on the project Team. As a company, work assignments are scheduled by each office two weeks in advance with long-range projected workloads for each department, and for each project manager a quarter in advance



F. Required Forms

Appendix B
NONCOLLUSION AFFIDAVIT

I state that I am Vice President of Planning of RVi Planning + Landscape Architecture
(TITLE) (NAME OF FIRM)

and that I am authorized to make this affidavit on behalf of my firm, and its owners, directors, and officers. I am the person responsible in my firm for the price(s) and the amount of this bid.

I state that

1. The price(s) and amount(s) of this bid have been arrived at independently and without consultation, communication or agreement with any other contractor, bidder, or potential bidder.
2. Neither the price(s) nor the amount(s) of this bid, and neither the approximate price(s) nor approximate amount(s) of this bid, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before bid opening.
3. No attempt has been made or will be made to induce any firm or person to refrain from bidding on this contract, or to submit a bid higher than this bid, or to submit any intentionally high or noncompetitive bid or other form of complementary bid.
4. The bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive bid.
5. RVi Planning + Landscape Architecture its affiliates, subsidiaries, officers, directors, and
(NAME OF FIRM)

employees are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

I state that RVi Planning + Landscape Architecture understands and acknowledges that the
(NAME OF FIRM)

above representations are material and important, and will be relied on by City of Belle Isle in awarding the contract(s) for which this bid is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from City of Belle Isle of the true facts relating to the submission of bids for this contract.

RVi Planning + Landscape Architecture
(NAME OF FIRM)


(SIGNATURE)

Witnessed before me this

27th Day of January, 2023.



My commission expires March 5, 2023



Appendix C

NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization or business entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Belle Isle. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

It is the policy of the City of Belle Isle that Minority/Women- Owned Business Enterprises (MWBE) shall have the maximum opportunity to participate in all contracts. The City of Belle Isle will accept MWBE certifications from Orange County and any State of Florida certification.

Further, City Purchasing Police Section 1.8 requires that all contracting agencies of the City, or any department thereof, acting for or on behalf of the City, shall include in all contracts and property contracts hereinafter executed or amended in any manner or as to any portion thereof, a provision obligating the contractor not to unlawfully discriminate (as proscribed by federal, state, county, or other local law) on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, sexual orientation, gender identity or expression, marital status, pregnancy, familial status, veterans status, political affiliation, or physical or mental disability and such person's association with members of classes protected under this chapter or in retaliation for or opposition to any practices forbidden under this chapter against any employee of, any City employee working with, or applicant for employment with such contractor and shall require such contractor to include a similar provision in all subcontracts executed or amended there under.


By: Alexis Crespo 

Title: Vice President of Planning

STATE OF FLORIDA
COUNTY OF ~~Orange~~ PINELLAS

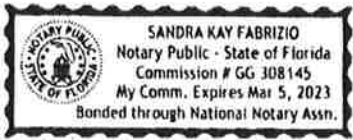
Sworn to and subscribed before me this 26th day of January, 2023, by

Alexis Crespo, Vice President of Planning


Signature of Notary Public

X Personally known, or
Produced Identification

Type of ID Produced: _____



Appendix D

Page 1 of 2

NON-DEBARMENT AFFIDAVIT

Alexis Crespo, AICP

Being first duly sworn, deposes and says that:

He/She is Vice President of RVi Planning + Landscape Architecture the Proposer ("Respondent") that has

submitted the attached Proposal. By offering a submission to this RFP, the Respondent certifies and affirms that to the best of his/her knowledge and belief, that:

1. The Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any transaction of any Federal, state or local agency; and
2. The Respondent has not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records; making false statements; or receiving stolen property; and
3. The Respondent is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph 2 of this affidavit; and
4. The Respondent has not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default; and
5. The Respondent will submit a revised Debarment Affidavit immediately if the status changes.

If the Respondent cannot certify that he/she is not debarred, he/she shall provide an explanation with this submittal. An explanation will not necessarily result in denial of participation in a contract. Failure to submit a debarment affidavit will disqualify the contractor from the award of any contract.

_____ Check here if an explanation is attached to this affidavit.

Alexis Crespo

By: _____

Print Name: Alexis Crespo, AICP

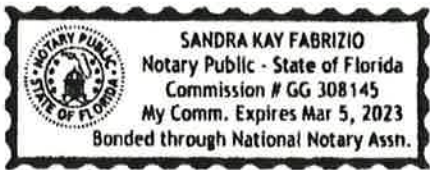
Title: Vice President

Date: 2/7/2023

STATE OF FLORIDA)
COUNTY OF PINELLAS)

The foregoing Agreement was acknowledged before me this 8TH day of
February, 2023, by Alexis Crespo, who has affirmed
that he/she has been duly authorized to execute the above document. He/she is personally
known to me or has produced FL Driver's License as identification.

NOTARY'S SEAL:



NOTARY PUBLIC, STATE OF FLORIDA

Sandra K. Fabrizio

Name of Acknowledger, typed, printed, or
Stamped

Sandra Kay Fabrizio, Notary Public

Appendix E

DRUG-FREE WORKPLACE CERTIFICATION

Preference must be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program, a business shall:

- 1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- 2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- 3) Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- 4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- 5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- 6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

RVi Planning + Landscape Architecture

COMPANY NAME



VENDOR'S SIGNATURE

Alexis Crespo, AICP, LEED AP, Vice President

Must be executed and returned with attached proposal to be considered.

Appendix F

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Alexis Crespo, AICP, LEED AP, Vice President, on behalf of RVi Planning + Landscape Architechure,

Print Name and Title

Company Name

certify that RVi Planning + Landscape Architechure does

not:

Company Name

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. The City shall provide notice, in writing, to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S. or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

RVi Planning + Landscape Architechure

COMPANY NAME

Alexis Crespo, AICP, LEED AP

PRINT NAME

Vice President

TITLE



SIGNATURE

Must be executed and returned with attached proposal to be considered

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RVi
Open the Outdoors

RFP #23-04
(TECHNICAL PROPOSAL, COMPREHENSIVE PLAN)
PLANNING SERVICES FOR COMPREHENSIVE PLAN UPDATE



CONTACT: NILSA ZACARIAS, AICP

Project Manager
Telephone: +1 (407) 536-7970
Fax: +1 (407) 536-7971
email: nzacarias@chenmoore.com

Office Location
341 North Maitland Avenue
Suite 346
Maitland, FL 32751



SECTION 1

g. Cost Estimate

b.

PROJECT TASKS		COST ESTIMATE	
		%	\$
	Project Kick-Off and Coordination with City Staff	5%	\$4,942.00
1	Existing Conditions Analysis	20%	\$ 19,768.00
2	Coordination with Committee	10%	\$ 9,884.00
3	Public Engagement	10%	\$ 9,884.00
	Individual Interviews/Meetings with Committee members, City Staff and City Leaders, and Community Key Stakeholders		
	Community Open Houses, and Workshops, Public Hearings		
	Community Survey, QR Code, Flyers		
	City's Website, Social Media		
	Prepare Summary of Public Engagment Outcome		
4	Review and Update each Element (GOPs; Data and Analysis; and Maps)	40%	\$ 39,536.00
	Introduction Chapter		
	1. Future Land Use		
	2. Housing		
	3. Transportation		
	4. Infrastructure		
	5. Recreation and Open Space		
	6. Conservation		
	7. Intergovernmental Coordination		
	8. Capital Improvements		
	9. Public School Facilities		
	10. Private Property Rights (Rquired New Element by F.S.)		
	11. Proposed New Elements based on the recommendations of the Committee, City Staff , City Leaders, and Public Engagemen (For example: <i>Economic Development, Healthy Community, Resiliency, etc.</i>)		
	12. Map Series		
5	Approval Process and Final Deliverables	15%	\$ 14,826.00
	LPA Hearing		
	Council Transmittal Hearing		
	Transmittal to DEO and Other Agencies (Seven Agencies)		
	ORC Report Responses if Needed		
	Council Adoption Hearing and Transmittal to DEO and other Agencies		
	Deliver to the City all documents according to the RFP and Proposal		
	TOTAL	100%	\$ 98,840.00

Note: The total maximum cost for this project is \$98,840.

Section 1

TABLE OF CONTENTS

b.

Section Number	Section Title	Page Number
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	b. Executive Summary	
	c. Staffing Plan	
	d. References	
	e. Project timetable	
	f. Forms	
A	Appendix A	A-1

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341 N. Maitland Ave., Suite 346
Maitland, FL 32751
Office: +1 (407) 536-7970



Letter of Interest

February 9, 2023

Raquel Lozano
City Planner
City of Belle Isle
1600 Nela Avenue
Belle Isle, FL 32809

**Re: Planning Services for Comprehensive Plan Update RFP #23-04
CMA Project No. 23-0000.P0013**

Dear Ms. Lozano:

The City of Belle Isle located along Lake Conway and its chain of lakes strive to preserve its natural resources and enhance the quality of life of its residents since its incorporation in 1924. This dedicated commitment is reflected in the vibrant community life, and its continuous goal to provide a safe and sustainable city.

Chen Moore and Associates (CMA) is grateful for the opportunity to submit our response for professional Planning Services for the Comprehensive Plan Update for the City of Belle Isle. CMA is an awarded multidisciplinary consulting firm founded in 1986 that provides outstanding city planning, civil engineering, and landscape architecture services to local governments in Florida.

CMA is proposing a high-level proficient team including AICP planners and P.E. engineers proficient in Florida Statutes and engineering standards to in-depth analysis and policy amendments. The CMA Team has the credentials to provide land planning, urban design, public meeting facilitation, landscape architecture, transportation, drainage, water, and wastewater engineering. With unparalleled technical analysis, writing skills, and graphic design capabilities (CAD renderings and GIS mapping), the CMA Team is positioned to deliver successful and meaningful planning services to the City of Belle Isle.

Communication is paramount for a successful long-range project, and CMA is appointing a project manager that will keep a fluid communication with the City and the appointed Committee. As indicated on the evaluations provided by current clients, CMA professionals have a track record of going above and beyond to ensure that **services are delivered on time and on budget**. CMA understands the City needs and challenges, and it will ensure that the final adopted Comprehensive Plan will include policies for the future development of the City based on an in-depth analysis of each element, public engagement and recommendations; and state and local regulations.

The Comprehensive Plan prepared by CMA will reflect the City's commitment to maintain and enhance the quality of life to its residents. CMA will provide a successful outcome by providing the following qualifications further detailed in this proposal:

- KNOWLEDGE of the City of Belle Isle
- EXPERTISE in Florida Statutes and Engineering Standards
- EXPERIENCED AND QUALIFIED TEAM - AICP Certified Planners, and P.E Engineers
- PROVEN RECORD OF OUTSTANDING SERVICE - Compliance with Time and Budget Requirements.
- GRAPHIC RESOURCE CAPABILITIES - Advanced GIS and Computer Graphics
- EFFECTIVE PUBLIC COMMUNICATION - Presentations to Residents, City Council, Boards and Committees.

CMA understands the scope of work and is committed to meeting all the specified requirements outlined in the RFP document, including all insurances. The CMA Team will be honored to provide services to the City of Belle Isle and work with the City Staff. Thank you for the opportunity.

Respectfully submitted,

CHEN MOORE AND ASSOCIATES

Peter Moore, P.E., F.ASCE, FACEC, President

chenmoore.com

SECTION 1

b.

a. Proposer Form

IX. Form of Proposal

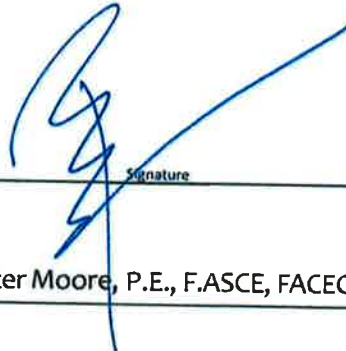
Planning Services to Complete a Comprehensive Plan

City of Belle Isle, Florida

The undersigned, being a duly authorized officer of the organization listed below, does hereby submit this proposal for Planning Services, under all terms and conditions (except those noted) as specified in the City of Belle Isle Request for Planning Services to Complete a Comprehensive Plan.

All information requested in Section IV, Proposed Content, is included in this proposal for planning services for the City's consideration.

Respectfully submitted by:


Signature

Name (Typed):

Peter Moore, P.E., F.ASCE, FACEC

Position:

President

Company or Organization:

Chen Moore and Associates, Inc.

Address:

341 North Maitland Avenue, Suite 346

Maitland, FL 32751

Telephone Number:

(407) 536-7970

Email Address:

pmoore@chenmoore.com

b. Executive Summary

Profile and Locations

Founded in 1986, Chen Moore and Associates (CMA) specializes in planning and irrigation, landscape architecture, environmental, civil engineering, water resources, water and sewer, electrical engineering, transportation, and construction engineering services. With the recent addition of Fred Wilson and Associates (opened in 1962) during the 3rd quarter of 2021, the combined firm has now officially been in business for over sixty (60) years. The firm commits to providing responsive quality services while meeting the schedules and specific project needs of our clients. The firm has its headquarters in Fort Lauderdale. CMA has regional offices in Miami, West Palm Beach, Orlando (Maitland), and Jacksonville, with additional offices in Port St. Lucie, Sarasota (Nokomis), Gainesville, Tampa, and Atlanta, GA. The firm commits to providing responsive quality services while meeting the schedules and specific project needs of our clients.

CMA's key services groups include Civil Engineering (water/sewer, roadway/highway, stormwater, general civil), Electrical Engineering, Landscape Architecture & Planning, and Construction Administration.

CMA's key market groups are as follows: Water and Sewer; Transportation; Water Resources; Parks and Recreation; Energy and Land Development.

CMA employs 116 full time staff, including 41 registered professional engineers, 7 registered landscape architects, 4 certified planners and a certified irrigation designer. With our highly experienced technical design staff, the CMA team has the capabilities to address the smallest to the most challenging planning, landscape architecture, civil, environmental and transportation engineering, and construction administration tasks required for many types of public, semi-public and private sector projects. The City can be assured that the CMA team can handle all components of the projects performed under this contract.

The Comprehensive Plan prepared by Chen Moore and Associates (CMA) will reflect the City's commitment to maintain and enhance the quality of life of its residents. **CMA understands the City's Mission and Vision, and it will ensure that the final adopted Comprehensive Plan will include policies for future development based on in-depth analysis of each element, public engagement, City's staff, Committee recommendations, and federal, state and local regulations.**

Mission The City of Belle Isle continuously preserves our natural resources and enhances our quality of life through intelligent, inclusive leadership and outstanding municipal services.

Vision A safe, serene Florida community where families desire to reside, raise a family, enjoy our natural surroundings, excellent schools and quiet way of life.

Belle Isle was founded by Central Floridians in 1924 to protect Lake Conway and its chain of lakes. Belle Isle's first citizens and interim Mayor C.H. Hoffner unanimously voted on the city's name, which resembles the French phrase for "beautiful island." The city has a total area of 5.1 square miles (13.2 km²), of which 2.3 square miles (6.0 km²) is land and 2.8 square miles (7.2 km²) (54.42%) is water. According to the 2020 US Census, the following demographics applies to Belle Isle:

- Population 7,032
- Median value of owner-occupied housing \$367,500
- Owner Occupy Housing Unit Rate 94.3%
- Median Household Income \$113,309
- High School Graduate or Higher 96.2%



CMA is an awarded multidisciplinary consulting firm founded in 1986 that provides outstanding city planning, civil engineering, and landscape architecture services to local governments in Florida. CMA is proposing a high-level team including AICP planners and P.E. engineers proficient in Florida Statutes and engineering standards. The CMA Team has the credentials to provide land planning, urban design, public

meeting facilitation, landscape architecture, transportation, drainage, water, and wastewater engineering. With unparalleled technical analysis, writing skills, and graphic design capabilities (CAD renderings and GIS mapping), the CMA Team is positioned to deliver successful and meaningful planning services to the City of Belle Isle.

Communication is paramount for a successful long-range project, and CMA is appointing **Nilsa Zacarias, AICP**, as the project manager for this initiative. Ms. Zacarias has more than 20 years of experience in working with local governments and preparing Comprehensive Plans. **Mr. Osniel Leon, AICP**, Senior Planner, brings to the team his in-depth knowledge of Florida Statutes, and outstanding writing skills. **Ms. Mckenna Page** expertise in data analysis and GIS mapping are essentials to prepare a well thought through Comprehensive Plan. The Transportation, Infrastructure and Capital Improvement elements will be analyzed and updated by an expert team of licensed engineers with more than 15 years of experience as indicated in their resumes: **Mr. Robert Best, Jr., P.E;** **Ms. Jennifer Smith, P.E.;** **Mr. Benjamin Lehr, P.E., DBIA, LEED AP.**

The CMA Team proposed Comprehensive Plan update will be based on a proactive community engagement process and collaboration with the Committee, City Staff and Leaders. The scope of work includes the following tasks:

TASK 1. EXISTING CONDITIONS ANALYSIS

The CMA Team will analyze existing conditions and trends based on collected information, visual observation and **meetings with Committee members, City Staff and Leaders.** *The goal of this existing condition analysis is to understand key issues, identify constraints, potentials and trends experiencing the City.*

The CMA Team will be responsible for the following tasks:

- Review the City's existing planning documents, including the past Comprehensive Plan plus any plans for specific departments, facilities, or public community assets.
- Review the City's current Zoning Ordinance, land use policies, environmental resources and open space, historic properties, economic and population statistics, past planning documents, infrastructure, stormwater management, and other relevant information and data to form the groundwork for the Plan's development. Planner will work with City staff for the necessary information.
- Assess the City's transportation network, focusing on roads, walkability, connections to public transportation, handicap accessibility, and general accessibility of public assets and community attractions.

All aspects of the plan will be completed with consideration of the Orange, County Comprehensive Plan, the Municipal Planning Code, the Municipal, Separate Stormwater Sewer System regulations, the City's Stormwater Management Plan, the City's Transportation System Plan, and all other applicable state and federal guidelines and regulations.

TASK 2. COORDINATION WITH THE COMMITTEE

The CMA Team will establish goals and objectives for the planning process in collaboration with the Committee, including:

- Meet regularly with the Committee to provide updates and incorporate feedback on the Plan.
- Help the Committee develop a strategy for soliciting public involvement and input to the Plan, such as a visioning workshop, public meetings, and/or other methods of public engagement.
- Attend public meetings as part of the public involvement strategy as well as a public meeting of each the Planning Commission and the Board to present the Plan when completed.

TASK 3. PUBLIC ENGAGEMENT

The CMA Team proposes a Comprehensive Plan based on the long term vision of the City. The Project Team will lead the residents, City's leaders, committee and boards to "Develop the community's long-term goals and objectives of the City". The purpose of the proposed public outreach and participation program includes the following:

- Listen to the resident's current and future needs regarding the City's vision
- Define the City's long term goals that will serve as the basis of the updated documents
- Create a fun, inclusive and engaging process that celebrates Belle Isle identity and character

Public involvement and community outreach are the building blocks of updating the Comprehensive, and it should be incorporated into all steps of preparing the draft and the final version of the proposed document. Strategies will be coordinated with the Committee and it could include the following initiatives:

- Open Forums and Workshops at City Hall; One-on-One Interviews with appointed Committee Members, Key Stakeholders and Community Members
- Survey: paper copy and digital using QR Code to allow replying survey from mobile phone
- City's Website and Social Media Communication

TASK 4. REVIEW AND UPDATE EACH ELEMENT: POLICY, DATA AND MAPS

The CMA Team including planners and engineers will review and update the Goals, Objectives, and Policies (GOPs) and Data and Analysis of the following elements:

- Future Land Use Element
- Transportation Element
- Housing Element
- Infrastructure Element
- Conservation Element
- Recreation and Open Space Element
- Intergovernmental Coordination Element
- Capital Improvements Element
- Public School Facilities
- Private Property Rights element (this element will be added per F. S.)
- **New elements** as needed, and as a result of the Public Engagement process, for example, Economic Development, Healthy Communities, Environmental Resiliency, etc.

The CMA Team will:

- Prepare a detail demographic analysis based on the 2020 US Census including population, housing, e and others to assess economic trends that will be included in the recommendations.
- Incorporate into the Plan recommendations for changes to the Zoning Ordinance, land use and development policies, and other related policies for future development in the City. Inclusion of a map(s) highlighting developable land, potential changes to zoning districts, and other information that can be depicted visually will be included.
- Recommend strategies for open space and historic property preservation as well as providing options for land use not currently recognized in the City's land use policies.
- Prepare an action plan to implement the recommendations set forth, including identification of potential partners and stakeholders in the community.
- **Update all the Map Series required by F. S.**

TASK 5. REVIEW AND APPROVAL PROCESS

The CMA Team will lead the approval process of the updated Comprehensive Plan including the following:

- Provide final draft to Committee, conduct a workshop and update the document per feedback .
- Local Planning Agency (LPA) hearing – Power Point Presentation
- First Reading - City Council – Power Point Presentation
- Transmittal of proposed document to Department of Economic Development (DEO) and all required agencies
- Respond to the ORC Report if needed (Objections, Recommendations and Comments)
- Second Reading – City Council – Power Point Presentation
- Transmittal of adopted document to DEO and all required agencies.
- Provide electronic files and 15 printed copies of the ALL adopted document to the City including a large Future Land Use Map to be display.

The CMA Team will prepare a substantive document that will be graphic driven, easy to read and navigate by the City Staff and the Public. We will welcome the opportunity to share with you examples of Comprehensive Plans that we prepared for other local governments.

Why the CMA Team will be the best Planner for the City?

- **KNOWLEDGE:** We know Belle Isle and understand its values
- **EXPERIENCE:** We have prepared Comprehensive Plans for municipalities with similar demographics
- **REPUTATION:** We have an excellent track record to accomplish projects on time and on budget
- **COMMUNICATION:** We are easy to reach and keep continuous communication with City Staff

CMA is grateful for the opportunity to submit our response for professional Planning Services for the Comprehensive Plan Update for the City of Belle Isle. We understands the scope of work and are committed to meeting all the specified requirements outlined in the RFP document, including all insurances. **The CMA Team will be honored to provide services to the City of Belle Isle and work with the City Staff. Thank you for the opportunity.**

c. Staffing Plan

CMA has assembled a team of professionals and technicians with experience and expertise in the areas required to meet the goals and objectives of the City of Belle Isle. We have all the professionals needed to provide a wide range of technical services to the City. For detailed information please refer to our team's resumes following this section.

	Cristobal A Betancourt, PLA, AICP/Principal-in-Charge is CMA's Vice President of Landscape Architecture and Planning. He has experience providing planning and landscape architecture design solutions for public and private sector clients. His team provides a full range of services starting with due diligence and master planning culminating in detailed site design. He is well versed in the use of low-impact development techniques specifically applied to site planning, has knowledge of local municipal codes, and is proficient in Florida's plant palette, local environmental conditions, and site-specific microclimates used to prepare aesthetic and functioning landscape designs. <i>Office Location:</i> 500 Australian Avenue South, Suite 850, West Palm Beach, FL 33401
	Nilsa Zacarias, AICP/Project Manager and Lead is CMA's Principal Planner. She is a nationally and internationally recognized professional and Fulbright Scholar with over 25 years of experience working on challenging and complex planning initiatives. <i>Office Location:</i> 1851 W. Indiantown Road, Suite 100, Jupiter, FL 33458
	Osniel Leon, AICP/Senior Planner has more than 10 years of combined experience in the areas of land use, zoning, platting, and development regulations. <i>Office Location:</i> 1851 W. Indiantown Road, Suite 100, Jupiter, FL 33458
	Lance Lilly/Senior Planner is completing his fifth year in public sector land planning and project management in South Florida. As Planner for the Village of Tequesta, Mr. Lilly has experience in comprehensive planning, zoning review and site plan development review in municipal planning. Mr. Lilly has represented the Community Development Department at public hearings. <i>Office Location:</i> 1851 W. Indiantown Road, Suite 100, Jupiter, FL 33458
	McKenna Page/GIS Planner is a recent graduate of Florida Atlantic University's Bachelor of Urban and Regional Planning program. Ms. Page is currently assisting NZ Consultants with GIS mapping, company marketing, and research. <i>Office Location:</i> 1851 W. Indiantown Road, Suite 100, Jupiter, FL 33458
	Jason Sutton, PLA, CA/Landscape Architecture is a Principal Landscape Architect for CMA's landscape architecture team. He is proficient in Florida's plant palette, local environmental conditions, and site-specific microclimates used to prepare aesthetic and functioning landscape designs. He also brings experience with environmental and wildlife monitoring adding significant field knowledge to our team. Mr. Sutton is well versed in the use of low-impact development techniques specifically applied to site planning, and has extensive experience with parks and recreation facilities throughout Florida for public and private sector clients domestically and internationally, providing design, permitting, and construction observation services for many types of improvements, including numerous transportation projects; municipal parks; streetscapes; VA National Cemeteries; athletic fields; pedestrian, bicycle, and equestrian trails; site amenities; playgrounds; boating and aquatic facilities; resort properties; themed wayfinding; amphitheaters; landscape; hardscape; and irrigation.



Robert Best, Jr., P.E./Lead Engineer is a Principal Engineer for CMA and the Orlando (Maitland) Office Leader. Mr. Best has 19 years of experience, specializing in project management, study, design, and construction services in the areas of utilities, transportation, stormwater, and land development. This includes the analysis, design, and permitting of water distribution systems, wastewater collection systems, water reuse systems, roadways, stormwater systems/components, and development sites. Mr. Best's expertise includes hydraulic analysis; master planning and demand analysis; design of watermains, gravity sewers, force mains, pump stations, and treatment plant components; signing and pavement marking design; transportation corridor evaluations; stormwater analysis, design, and permitting; grading design; and site evaluation.

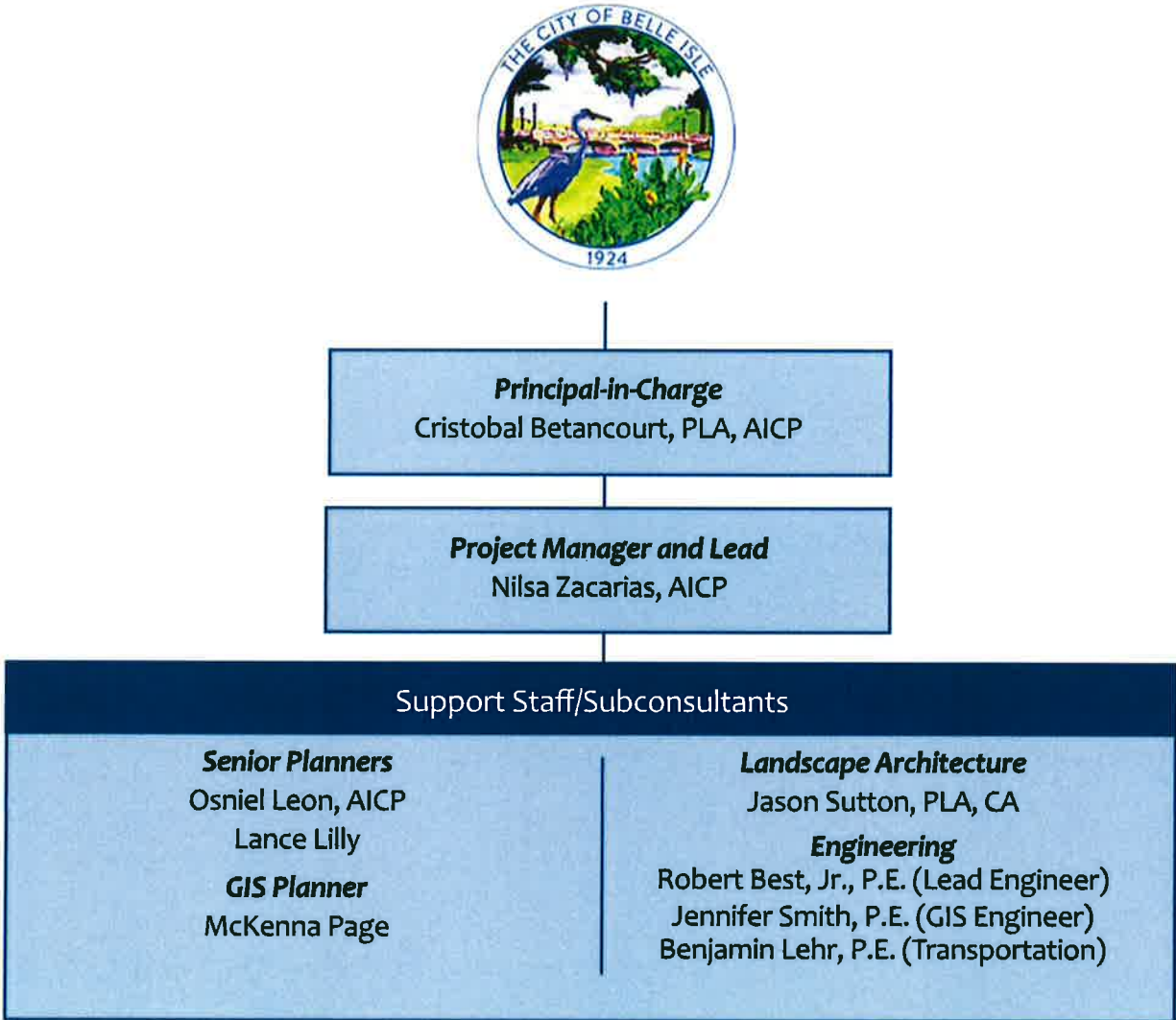


Jennifer Smith, P.E./GIS Engineer serves as a Principal Engineer for CMA's engineering team and has the technical experience necessary to accomplish the project goals related to the final deliverable. She has over 16 years of experience in civil engineering design, drafting, permitting, and construction inspection. Her design experience includes paving, drainage, stormwater management, water, sewer, and roadway design. She has prepared engineering drawings, cost evaluations, design reports, and various permit applications. She has been responsible for stormwater modeling and permitting on diverse public projects. *Office Location: 3970 Hendricks Avenue, Jacksonville, FL 32207*



Benjamin Lehr, P.E., DBIA, LEED AP/Transportation Engineer is responsible for the pursuit and delivery of transportation related public improvement projects in Florida and Georgia. He has 22 years of experience in project oversight, management and structural design for numerous transportation related projects in Florida, Georgia, Mississippi, South Carolina, North Carolina, Texas, Virginia, West Virginia and Ohio. *Office Location: 3001 N Rocky Point Dr. E, Suite 200 Tampa, FL 33607*

Organizational Chart



**Cristobal Belancourt, PLA,
AICP
Principal-in-Charge**

Hire Date

02/14/2011

Years with other firms: 16

Education

Bachelor of Science,
Landscape Architecture,
Cornell University, 1995
Master of Science, Urban
Design, Royal Danish
Academy of Fine Arts,
School of Architecture, 1996

Registration

Registered Landscape
Architect, Florida,
LA6666941, 2008
Registered Landscape
Architect, New Jersey,
AA000949, 2006
Registered Landscape
Architect, New York, 001959,
2005

Professional Affiliations

American Planning
Association

American Society of
Landscape Architects

Florida Recreation and Park
Association

National Recreation and
Park Association

Urban Land Institute

Certifications

American Institute of
Certified Planners
Council of Landscape
Architectural Registration
Board

Mr. Betancourt is CMA's Vice President of Landscape Architecture and Planning. He has experience providing planning and landscape architecture design solutions for public and private sector clients. His team provides a full range of services starting with comprehensive plan, land development regulations, due diligence and master planning culminating in detailed site design. He is well versed in the use of low-impact development techniques specifically applied to site planning, has knowledge of local municipal codes, and is proficient in Florida's plant palette, local environmental conditions, and site-specific microclimates used to prepare aesthetic and functioning landscape designs. Mr. Betancourt leads multi-discipline teams for comprehensive plans, parks and recreation facilities throughout Florida, providing design, permitting, and construction observation services for many types of improvements, including athletic fields; pedestrian, bicycle, and equestrian trails; site amenities; playgrounds; boating and aquatic facilities; themed wayfinding; amphitheaters; landscape; hardscape; and irrigation.

Project Experience

Hawthorne Rd Corridor Land Use Planning and Improvements. Gainesville Community Redevelopment Agency. CMA was contracted by the Gainesville Community Redevelopment Agency to create this visioning document for the Hawthorne Road Corridor from the Eastside Gateway feature (at approximately SE 14th Street) to SW 24th Street. This task included three main sub-tasks:

- Assess the infrastructure in the corridor and identify any deficient infrastructure that could impede redevelopment;
- Analyze current and future land uses and zoning to identify where current uses or zoning could impede redevelopment of adjacent parcels, and;
- Provide a Final Concept Plan for the Corridor to include overall pedestrian, bicycle, and motor vehicle circulation; hardscape treatments (paving, bus shelters, benches, trash receptacles, etc); lighting standards; and signage.

City of Westlake Comprehensive Plan and LDRs. City of Westlake. CMA is providing engineering and landscape architecture services for the City of Westlake. The scope includes review of permit applications; review of plans for the development within in the entire city limits; coordination with the City's planner; coordination with the City's staff members; and coordination with Seminole Improvement District whose jurisdictional boundary coincides with the City.

Broward County Infrastructure Element and Project Implementation UAZ 110/111 & 113 Water Sewer Improvements 113A (RFP No. R1356803P1). Broward County. Broward County UAZ Water Sewer Improvements 113A, Lauderdale Lakes, FL. The UAZ 113A project include the improvements to the existing water distribution and sanitary sewer system within the City of Lauderdale Lakes, along with restoration of surface areas disturbed for the construction of the improvements. The project had a total area of 207 acres and included the installation of 22,000 linear feet of gravity sewer, 5,800 linear feet of forcemain, and 29,800 linear feet of watermain. The total project included 57,600 linear feet of pipe. Pipe installation took place along local city roads, as well as County and FDOT jurisdiction roadways including West Oakland Park Boulevard and US-441. The existing water main consists of asbestos cement, cast iron, ductile iron, galvanized steel, and polyvinyl chloride pipe ranging

from 2" - 18" in diameter size. The sanitary sewer consists of vitrified clay, fold and form liner, cured in place liner, and ductile iron pipe ranging from 8" - 12" in diameter size. The force main consists of asbestos cement, cured in place liner, ductile iron, and polyvinyl chloride pipe ranging from 6" - 16" diameter size. County lift station 50N was rehabilitated as part of this project. The restoration of roadways, sidewalks, driveways, and landscape areas will need to be performed as needed for water and sanitary sewer improvement construction. The project is currently under construction and CMA is performing construction administration services.

Open and Space and Recreation Element and Project Implementation 2500 Jupiter Park Drive Conceptual Site Planning - PO 22-0211. Loxahatchee River District. CMA shall provide professional services for planning, engineering, environmental assessments, architecture, and landscape architecture for the conceptual planning of proposed facilities at Loxahatchee River Environmental Control District's (LRECD) 160-acre regional wastewater facility and administration site. The scope of work includes environmental assessments, regulatory reviews, extensive coordination with staff for desired site needs and optimization of operations, massing studies, and conceptual site plans. Passive recreation will be a component of the proposed site plans and associated funding opportunities to support it. A sustainability and resiliency effort will also be conducted. Both the existing and proposed site will be reviewed in terms of site security and vulnerability.

Currie Park – Public Engagement, Open Space and Recreation Element and Project Implementation - Architectural and Engineering Services (20862.002). City of West Palm Beach. CMA is the prime consultant leading the redevelopment of Currie Park for the City of West Palm Beach. The project aims to enhance a public asset to provide a substantial public benefit increasing the health, welfare and economic vitality of the community. The 13.6 acre waterfront park currently consists of public open space including boat ramps with trailer parking, tennis courts, fishing pier, playground, a landmark memorial to commemorate the late Dr. Martin Luther King Jr., covered pavilions and restroom facilities. The Project is broken into two phases. CMA led the development Phase I which included Information Gathering, Public Engagement, and Visioning for the Project. In addition to Visioning, our team conducted a marina market analysis, developed a maintenance and operations plan, and identified public/private partnerships and other means of financing the construction and operation of Currie Park as part of Phase I services. The CMA team identified and assisted the City/CRA in applying for a \$20.3 million Building Resiliency Grant offered through the Florida Department of Economic Opportunity. The project was awarded \$16.74 million of the grant request. The Vision Plan was approved by the CRA Board and Commission on June 1, 2021. CMA is currently planning Phase II activities which will include Construction Documentation, Permitting, and Construction Administration.

Infrastructure Element and Project Implementation: Miccosukee Service Plaza. Burton Hersh PA. CMA is providing surveying, geotechnical engineering/testing, water/wastewater master planning (treatment plant), civil engineering design, landscape architecture, permitting, and construction observations services for the bus and truck route parking/drop off at the Miccosukee Service Plaza. CMA will coordinate with subconsultants for a boundary and topographic survey, subsurface utility engineering services, and geotechnical engineering testing. CMA's civil engineering services include providing a water and sewer master plan, utility coordination and preliminary engineering, construction documents, government permitting, bidding assistance, and construction services. CMA's landscape architecture services include landscape and hardscape plans for the site, entry features and ramp; irrigation plans; bidding/permitting; and construction administration.

Transportation Element and Project Implementation: Margate Boulevard Crosswalk and Landscape Improvements - City of Margate CRA - PO 211033 - RFQ 2021-002. Margate Community Redevelopment Agency. CMA is providing civil engineering, planning and landscape architecture services for the design, permitting, and construction administration services. The services provided will include sidewalk and crosswalk repairs that conform to the current ADA compliance standards, landscaping, irrigation, and landscape up lighting. The landscape improvements will be limited to the edges of the roadway corridor adjacent to the pedestrian sidewalks, the roundabout approaches at Margate Boulevard/NW 58 Avenue and the green space within the roundabout.

Nilsa Zacarias, AICP
Project Manager

Hire Date

07/27/2009

Years with other firms: N/A

Education

Master of Science, Master of
Community and Regional
Planning Minor in Housing,
Iowa State University,
Fulbright Scholar,
Bachelor of Architecture,
Catholic University Asuncion,
Paraguay

Professional Affiliations

CTM, Toastmasters
International
Fulbright Alumni Association
Historical Preservation
Board, Town of Jupiter
Palm Beach Planning
Congress
Planning & Zoning
Commission, Town of
Jupiter

Certifications

Certified Planner by the
American Institute of
Certified Planners (AICP)

Presentations at

Conferences

Urban Planning and Public
Participation, Lecture at the
Catholic University, Paraguay,
South America, March 2022
Our Cities Post Pandemic
Reality: How Land Use and
Design Are Defining Our
"New Normal." American
Planning Association Florida
Chapter Conference (FAPA),
Miami, Florida – September
2021

The Critical Role of Land Use
Compatibility: Amazon
Distribution Center in Village
of Golf, Planning Challenges
Seminar. The Palm Beach
County Planning Congress,
July 2021.

Nilsa Zacarias, AICP is CMA's Principal Planner. She is a nationally and internationally recognized professional and Fulbright Scholar with over 25 years of experience working on challenging and complex planning initiatives including Comprehensive Planning, Public Engagement, Land Development Regulations, Annexations, Corridor and Neighborhood Plans. She has an in-depth knowledge of Florida Statutes and required process to transmit and adopt a Comprehensive Plan.

Project Experience

Lake Worth Beach Visioning & Sustainable Comprehensive Plan Update. City of Lake Worth Beach. CMA was hired, in 2016, by the City of Lake Worth Beach. The City determined it was necessary to conduct a review and evaluation of its current Comprehensive Plan to reflect changes in state requirements, current City's conditions, challenges, and future community trends. Pursuant to Chapter 163.3191, Florida Statutes (F.S.), local governments are required to evaluate their local comprehensive plan every seven years to determine if plan amendments are necessary since the last update of the Comprehensive Plan and notify the State Land Planning agency as to its determination.

To prepare the subject amendments, the City contracted CMA to work with the Sustainability Department as well as other City's Departments. The Comprehensive Plan update focused on strengthening Lake Worth Beach as a sustainable community incorporates multi-modal transportation network; compact, walkable, mixed-use patterns of development; provision of civic spaces and interconnected open spaces for recreation; economic vitality and job choices; diversify its housing supply; and a robust educational system.

The proposed Comprehensive Plan amendment encompasses the following eleven (11) elements including a new element-Economic Development-and the addition of Neighborhoods to the existing Housing Element:

- Future Land Use
- Transportation
- Housing & Neighborhoods (Neighborhoods was added to this element)
- Infrastructure
- Coastal Management
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement
- Public School Facilities
- Economic Development (New Element)

Village of Tequesta Visioning & Comprehensive Plan Update. Village of Tequesta. The CMA planning team revised and updated each element to be in compliance with Florida Statutes and provide a sustainable community. The State of Florida (Department of Economic Opportunity) found the subject plan in compliance with Florida Statutes. The Comprehensive Plan addressed Senate Bill 1040 Peril of Flood that applies to Coastal Communities

The CMA planning team prepared the EAR-based (Evaluation and Appraisal Report) Comprehensive Plan Amendment for the Village of Tequesta. The Comprehensive Plan encompasses the following elements:

- Future Land Use
- Recreation & Open Space
- Capital Improvement
- Housing
- Utilities
- Conservation
- Intergovernmental Coordination
- Coastal Management
- Transportation

Manalapan Town Planning. Town of Manalapan. The CMA planning team has been providing planning and zoning services to the Town of Manalapan since 2015. The team is responsible for site plan reviews, comprehensive plan updates and zoning code amendments. The CMA planning team also prepared the Community Rating System report for the Town of Manalapan including the following information :

- Public Information
- Mapping and Regulations
- Flood Damage Reduction
- Warning and Response

City of Westlake Visioning & Comprehensive Plan. City of Westlake. Palm Beach County's new 39th City was incorporated on June 20, 2016. The 38,000 acres of mostly vacant, previously agricultural land in western Palm Beach County will be the site of 4,500 homes and 2.2 million square feet of commercial space. This new city will provide much-needed urban services to the surrounding suburban residential areas.

The CMA planning team prepared the first comprehensive plan for the City of Westlake. The plan was adopted in 2018, and it is in compliance with Florida Statutes. The CMA planning team has been the City's planning staff since 2016. The team wrote the new Zoning Code to be consistent with the City's Comprehensive Plan Vision in compliance with the following goals:

- Protect Residential Neighborhoods
- Provide Diversity of Housing
- Promote a Vibrant Mixed-Use District
- Support Employment Hubs
- Embrace Parks and Open Spaces

Town of Mangonia Park Visioning, Comprehensive Plan, & Land Development Regulations. Town of Mangonia Park. CMA was contracted by the Town of Mangonia Park to update their comprehensive plan. Florida Statutes require that each local government within the state must prepare, adopt, and submit an Evaluation and Appraisal Review of its comprehensive plan at least every seven years. This EAR based amendment should address changes in the state requirements and changes to local conditions since the last update of the comprehensive plan. In 2020, the Mangonia Park comprehensive plan prepared by the CMA planning team was adopted.

The CMA planning team prepared the EAR based (Evaluation and Appraisal Review) Comprehensive Plan Amendment for the Town of Mangonia Park. The Comprehensive Plan consists of the following elements:

- Introduction and Administration
- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement Element

Osniel Leon, AICP
Senior Planner

Hire Date

10/21/2021

Years with other firms: N/A

Education

Bachelor of Science, Urban
 and Regional Planning,
 Florida Atlantic University

Professional Affiliations

American Planning
 Association

Congress for the New
 Urbanism

Palm Beach Planning
 Congress

Certifications

Certified Planner by the
 American Institute of
 Certified Planners (AICP)

Mr. Leon has more than 10 years of experience in the areas of comprehensive planning, land use, zoning, platting, and development regulations. Mr. Leon knowledge of comprehensive planning and land development regulations are based on years of experience providing services to local governments.

Project Experience

Town of Mangonia Park Visioning, Comprehensive Plan, & Land Development Regulations. Town of Mangonia Park. CMA was contracted by the Town of Mangonia Park to update their comprehensive plan. Florida Statutes require that each local government within the state must prepare, adopt, and submit an Evaluation and Appraisal Review of its comprehensive plan at least every seven years. This EAR based amendment should address changes in the state requirements and changes to local conditions since the last update of the comprehensive plan. In 2020, the Mangonia Park comprehensive plan prepared by the CMA planning team was adopted.

The CMA planning team prepared the EAR based (Evaluation and Appraisal Review) Comprehensive Plan Amendment for the Town of Mangonia Park. The Comprehensive Plan consists of the following elements:

- Introduction and Administration
- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement Element

City of Westlake Visioning & Comprehensive Plan. Palm Beach County's 39th City was incorporated on June 20, 2016. The 38,000 acres of mostly vacant, previously agricultural land in western Palm Beach County will be the site of 4,500 homes and 2.2 million square feet of commercial space. This new city will provide much-needed urban services to the surrounding suburban residential areas.

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- Protect Residential Neighborhoods
- Provide Diversity of Housing
- Promote a Vibrant Mixed-Use District
- Support Employment Hubs
- Embrace Parks and Open Spaces

City of Westlake Visioning & New Land Development Regulations. City of Westlake. CMA was contracted by the City to provide general planning and zoning services. The consulting contract includes long range and current planning projects.

Researching, Identifying, and Recommending Amendments to Comprehensive Plan

- Small and Large Scale

Reviewing and Amending Land Development Regulations

- In-depth Analysis
- Write Code Text

Reviewing and processing Site Plan and Variance Applications

Conducting Development Review Committee Meetings

Preparing Staff Reports and Presentations

- Municipal Council

Local Planning and Zoning Review Board

Lance Lilly
Senior Planner

Hire Date

09/28/2016

Years with other firms: N/A

Education

Master of Science, Master of
Urban and Regional
Planning, Florida Atlantic
University

Professional Affiliations

Palm Beach Planning
Congress

Lance Lilly has more than 6 years in public sector land planning and project management in South Florida. As a CMS Planner he provides services for the Village of Tequesta, City of Ft. Pierce, City of Westlake and others. Mr. Lilly has experience in comprehensive planning, zoning review and site plan development review in municipal planning. Mr. Lilly has represented the Community Development Department at public hearings.

Project Experience

Village of Tequesta Visioning & Comprehensive Plan Update. Village of Tequesta. The CMA planning team revised and updated each element to be in compliance with Florida Statutes and provide a sustainable community. The State of Florida (Department of Economic Opportunity) found the subject plan in compliance with Florida Statutes. The Comprehensive Plan addressed Senate Bill 1040 Peril of Flood that applies to Coastal Communities.

The CMA planning team prepared the EAR-based (Evaluation and Appraisal Report) Comprehensive Plan Amendment for the Village of Tequesta. The Comprehensive Plan encompasses the following elements:

- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation & Open Space
- Intergovernmental Coordination
- Coastal Management
- Capital Improvement

City of Westlake Visioning & Comprehensive Plan. Palm Beach County's 39th City was incorporated on June 20, 2016. The 38,000 acres of mostly vacant, previously agricultural land in western Palm Beach County will be the site of 4,500 homes and 2.2 million square feet of commercial space. This new city will provide much-needed urban services to the surrounding suburban residential areas.

The CMA planning team prepared the first comprehensive plan for the City of Westlake. The plan was adopted in 2018, and it is in compliance with Florida Statutes. The CMA planning team has been the City's planning staff since 2016. The team wrote the new Zoning Code to be consistent with the City's Comprehensive Plan Vision with the following goals:

- Protect Residential Neighborhoods
- Provide Diversity of Housing
- Promote a Vibrant Mixed-Use District
- Support Employment Hubs
- Embrace Parks and Open Spaces

McKenna Page
GIS Planner

Hire Date

07/11/2022

Years with other firms: N/A

Education

Bachelor of Arts, Urban and
Regional Planning, Florida
Atlantic University, 2022

McKenna Page passion for data analysis and GIS mapping are key attributes to a successful Comprehensive Plan. She had prepared outstanding map series to comply with Florida Statutes requirements.

Project Experience

Town of Lake Park, GIS Mapping. The CMA Team prepared the map series to update the Town's Comprehensive Plan including the following:

- Future Land Use Map
- FEMA Flood Zone Designation
- Potential Annexation Area Map
- Hurricane Surge Map
- Vacant Parcels Map
- Coastal High Hazard Area Map

Village of Tequesta Visioning & Comprehensive Plan Update. Village of Tequesta. The CMA planning team revised and updated each element to be in compliance with Florida Statutes and provide a sustainable community. The State of Florida (Department of Economic Opportunity) found the subject plan in compliance with Florida Statutes. The Comprehensive Plan addressed Senate Bill 1040 Peril of Flood that applies to Coastal Communities.

The CMA planning team prepared the EAR-based (Evaluation and Appraisal Report) Comprehensive Plan Amendment for the Village of Tequesta. The Comprehensive Plan encompasses the following elements:

- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation & Open Space
- Intergovernmental Coordination
- Coastal Management
- Capital Improvement



Jason Sutton, PLA, CA
Landscape Architect

Hire Date

08/31/2017

Years with other firms: 7

Education

Bachelor of Science,
 Landscape Architecture,
 University of Florida, 2007
 Minor Degree in
 Horticultural Science

Registration

Registered Landscape
 Architect, Florida,
 LA6667189, 2014

Professional Affiliations

Florida Planning and Zoning
 Association (Past President)

Certifications

FDOT Specifications
 ISA Certified Arborist

Civic Organizations

Seminole County Parks and
 Preservation Advisory
 Committee (SCPPAC)

Mr. Sutton is a Principal Landscape Architect for CMA's landscape architecture team. He is proficient in Florida's plant palette, local environmental conditions, and site-specific microclimates used to prepare aesthetic and functioning landscape designs. He also brings experience with environmental and wildlife monitoring adding significant field knowledge to our team. Mr. Sutton is well versed in the use of low-impact development techniques specifically applied to site planning, and has extensive experience with parks and recreation facilities throughout Florida for public and private sector clients domestically and internationally, providing design, permitting, and construction observation services for many types of improvements, including numerous transportation projects; municipal parks; streetscapes; VA National Cemeteries; athletic fields; pedestrian, bicycle, and equestrian trails; site amenities; playgrounds; boating and aquatic facilities; resort properties; themed wayfinding; amphitheaters; landscape; hardscape; and irrigation.

Project Experience

Design Criteria Professional Services for Winter Garden FS DCP Services with Bentley Architects & City of Winter Garden - RFQ EN19-030. City of Winter Garden. CMA is a subconsultant to Bentley Architects and Engineers for developing a Design Criteria Package for the City of Winter Garden's Fire Station 21. CMA is responsible for developing the landscape and irrigation criteria for the project. CMA's scope includes developing a concept plan for the landscape and irrigation components.

Turnpike GEC LA Services (FTE), FL. Florida Turnpike Enterprise General Engineering Contract. CMA is a subconsultant to HNTB on the General Engineering Contract for the Florida Turnpike Enterprise. CMA provides support to the District Landscape Architect's office in developing, managing, and implementing the five year landscape work program; landscape architectural design; updates and management of the FTE branding document; master planning of the FTE's landscape design; design for special assignments such as Suntrax, SR528, Coral Way Park, and interchange design for multiple locations; plans review; post design services; and landscape inventory utilizing ESRI GIS Collector to manage FTE's landscape assets.

TWO 01 Misc District Wide Landscape Support. State of Florida Department of Transportation District 6. CMA is providing FDOT District 6 with miscellaneous landscape architectural services. The scope of services includes plan reviews; attending and reporting on design, coordination, and review meetings; miscellaneous landscape architectural and engineering consultation; miscellaneous landscape architectural planning and design; construction inspection and/or field assessments; rendering sections and plan boards; permitting; project coordination, correspondence, and project filing; and developing project scopes.

238 W University Avenue. The Collier Companies. CMA provided site planning, civil engineering, and landscape architecture services for the development of a 5 story 297 unit mixed use residential project located in Downtown Gainesville known as 238 University. The project required site plan approval through the City of Gainesville and permitting through Gainesville Regional Utilities, St. John's Water Management District, and Florida Department of Transportation. The project received site plan approvals and permits but was discontinued because of concerns about available parking to support the development Downtown.

Stormwater Master Plan Modeling and Design Implementation. Hazen and Sawyer. CMA is providing engineering design services for the Stormwater Improvement Master Plan Modeling and Design Implementation Project under the City of Fort Lauderdale. CMA is responsible for the planning, modeling, design, and permitting for the proposed stormwater improvements within the Victoria Park neighborhood, which was identified as one of the 7 priority neighborhoods with the City. A combination of multiple improvements to the stormwater management system have been developed to alleviate the existing flooding issues within the Victoria Park neighborhood. The proposed stormwater improvements within the Victoria Park neighborhood include separate alternatives for the eastern and western portions of the neighborhood. Within the western portions of the Victoria Park neighborhood, the proposed stormwater improvements consist of installing additional pipe interconnectivity of various existing independent drainage networks located throughout the neighborhood, installing new exfiltration trench, and completing limited roadway swale restoration where feasible. Within the eastern portions of the Victoria Park neighborhood, the proposed improvements consist of interconnecting 6 independent positive outfalls into the Middle River, installing new backflow prevention, and adding a new stormwater pump station. The proposed stormwater improvements within the Victoria Park neighborhood are estimated to be approximately \$13 million in construction costs.

Temple Beth El-Building Addition & Associated Site Improvements. PGAL, Inc. Chen Moore and Associates is providing design, permitting, and construction administration of a building addition and associated site improvements to the Temple Beth El of Boca Raton. CMA is providing both landscape architecture and civil engineering. The landscape architecture scope includes schematic design, design development and construction/bid and permit documents, construction administration. The civil engineering scope includes schematic design, design development, construction documents, bid/permitting assistance, construction administration and site planning and processing.

Miami Dade County PROS - Area 226 Park - Multiple Playgrounds (5) EDP-PR-9999990C. Miami Dade Parks, Recreation and Open Spaces Department. CMA is providing master planning, construction documents, permitting, and construction administration services for five (5) nature themed playgrounds for Miami Dade County Parks, Recreation and Open Space (MDC PROS). The projects are distributed throughout the County and include Highland Oaks Park, Glenwood Park, Area 226, The Women's Park and Oak Grove Park.

Downtown Coral Springs Streetscaping. City of Coral Springs. CMA was contracted by the City of Coral Springs to assist the Coral Springs CRA in the planning, design, permitting, and construction support of various streetscaping improvements in Downtown Coral Springs. As the prime consultants, CMA provided civil engineering, landscape architecture, environmental permitting, and construction engineering and inspection services for the project. The project included implementing Complete Street concepts for NW 31st Court, NW 94th Avenue, and NW 32nd Street. Additionally, CMA implemented the culverting of the canal along NW 31st court to provide space for a linear park, called the "Art Walk", which is an important pedestrian connection between the downtown pathways project and The Walk development. Finally, the project included the implementation of turn lanes along Sample Road, median improvements in Sample Road, and minor improvements to adjacent alleyways and pedestrian pathways. Overall, the project improved the walkable nature of Downtown Coral Springs, while tying together various aesthetic elements in advance of the City Hall project sited adjacent to the projects. CMA was awarded a Florida Chapter of American Society of Landscape Architect's Merit Award for The Coral Springs Art Walk which is a flexible venue developed over an existing Sunshine Water Drainage Control District canal. It is reclaimed public space, which anchors the City's new Municipal Complex. The Art Walk hosts the City's Green Market, special events, and has rotating public art displays throughout the year.

Riviera Beach Heights Community Center. City of Riviera Beach Public Works. CMA is providing civil engineering and landscape architecture services to the City of Riviera Beach for a community center in the Riviera Beach Heights Neighborhood. The facility was designed as a multi-purpose community activity building. The proposed program for the project included site planning, hardscape, landscape, lighting, drainage and utilities design. Utilizing Low Impact Development (LID) site design techniques like parking lots with pervious concrete and sustainable landscaping. The sites amenities included outdoor seating areas, bicycle parking, and space for future multi-use courts.

Robert Best, Jr., P.E.
Lead Engineer

Hire Date

10/07/2019

Years with other firms: 16

Education

Master of Science,
 Environmental Engineering,
 University of Massachusetts
 at Amherst, 2005
 Bachelor of Science, Civil and
 Environmental Engineering,
 University of Massachusetts
 at Amherst, 2002

Registration

Professional Engineer,
 Florida, 69875, 2009

Professional Affiliations

American Society of Civil
 Engineers

Florida Engineering Society

Certifications

FDOT Temporary Traffic
 Control (TTC) Intermediate
 Course
 FDOT Advanced MOT/TTC
 Certification

Robert Best, Jr., P.E. is a Principal Engineer for CMA and the Orlando (Maitland) Office Leader. Mr. Best has 19 years of experience, specializing in project management, study, design, and construction services in the areas of utilities, transportation, stormwater, and land development. This includes the analysis, design, and permitting of water distribution systems, wastewater collection systems, water reuse systems, roadways, stormwater systems/components, and development sites. Mr. Best's expertise includes hydraulic analysis; master planning and demand analysis; design of watermains, gravity sewers, force mains, pump stations, and treatment plant components; signing and pavement marking design; transportation corridor evaluations; stormwater analysis, design, and permitting; grading design; and site evaluation.

Project Experience

South Bermuda - Parkway Reuse Interconnect & Judge Farms Pipeline Project - Design & Construction - RFQu-21-047. Tohopekaliga Water Authority. CMA is providing professional services associated with the second phase of the South Bermuda-Parkway Reuse Interconnect and Judge Farms Pipeline Project. During this phase CMA will provide professional services for the surveying, geotechnical, design, permitting, and construction of approximately 8,000 LF of 20-inch and 3,000 LF of 12-inch reuse water transmission mains to interconnect the South Bermuda and Parkway Water Reclamation Facilities' reclaimed water systems. The previous phase encompassed the routing study and identified the preferred option.

Wastewater Master Plan Update with City of Pompano Beach - PO 311557. City of Pompano Beach. The City of Pompano Beach wishes to update the City's previous wastewater master plan, which was initially completed in March 2012 and further updated in December 2016 by Mathews Consulting. The purpose of the previous wastewater master plan was to evaluate the existing wastewater utility system and to recommend system improvements needed to maintain adequate level of service over the 20-year planning period. CMA will update this previous wastewater master plan to incorporate various changes that have occurred since 2016 that have impacted or will impact the City's wastewater system, such as operational changes by the City, recent improvements to the City's wastewater system, recent development activities within the City, new future development planned within the City, and new regulatory requirements related to the wastewater system. CMA will focus our effort on operational capacity the City's wastewater lift stations and force main transmission system under both the existing conditions and the future conditions. As part of this effort, CMA will develop a capital improvement program for improvements to the City's wastewater system, which will include estimated construction costs and implementation schedule for each recommended improvement project.

The following two projects were performed by Mr. Best while with another firm:
SLF Infrastructure Phase 1 Development. NASA. As Engineer of Record, Mr. Best provided planning, surveying, geotechnical evaluation, design, and permitting services to NASA to repurpose the Shuttle Landing Facility (SLF) as a multi-use horizontal launch and landing facility. The SLF design project provides construction documents and permits to install common-use infrastructure, the design of which is based around schematic designs from the preceding studies for future commercial and industrial tenant hangars, buildings, and roadways to be developed along the SLF runway. Managed the

utilities design team and EOR for potable water, non-potable industrial water, wastewater, and high-pressure gas design.

East Putnam Water System Construction. Putnam County. As Engineer of Record, Mr. Best provided all planning, design, and permitting for the new regional water system. We also performed the construction-phase permitting services for this project. Executed and delivered construction contracts to the contracting parties and the funding agencies. Designed and performed calculations for the installation of three potable water distribution mains which comprised of approximately 2,400 LF of 6" PVC WM, approximately 4,800 LF of 10" PVC WM, approximately 85 LF of 8" HDPE WM by HDD, and approximately 85 LF of 10" HDPE WM by HDD. Prepared and submitted FDEP permit applications and supporting information and responded to FDEP RAIs.

O'Connell Center Stormwater Improvements (PO 1900720394). University of Florida. CMA provided engineering services to prepare a level of service assessment and possible replacement of stormwater facilities on the south side of the O'Connell Center adjacent to Van Fleet Hall. The University of Florida had identified a drainage issue adjacent to the O'Connell Center that appeared to be a result of undersized or insufficient infrastructure to connect the contributing area to the north with the natural area south of Stadium Road between the Keys Residential Complex and Tolbert Hall. The intent of this effort was to analyze the existing infrastructure based on as-built records, atlas data, and field survey to determine what infrastructure is needed to improve the drainage condition. The necessary infrastructure had been identified and construction documents will be prepared to be used by the selected Contractor for construction.

TWO 05 - C9Z63 - Design Landscaping Services for I-75 (SR 93) at CR 769 (Kings Hwy) - C9Z63 - FDOT D1 - FM No. 438996-1-52-01. State of Florida Department of Transportation District 1. CMA is the prime consultant providing professional landscape architecture services for FDOT District 1 through a continuing services contract for "Districtwide Landscaping." This task work order is for landscape improvements associated with the interchange of SR 93 (I-75) and CR 766 (King's Highway) in Charlotte County. The project limits are within the SR 93 right of way from (MP 20.77 to MP 21.41) immediately south and north of CR 769. The scope includes coordination with stakeholders, tree disposition, landscape design, irrigation design, and MOT. CMA is providing professional services for FDOT District 1, as part of a continuing services contract for "Districtwide Landscaping". This task work order is for landscape improvements associated with the interchange of I-75 and King's Highway. CMA's scope includes tree disposition, landscape and irrigation design, and MOT.

Hollywood Boulevard/26th Avenue Mast Arms Replacement (R-2020-136). City of Hollywood. CMA is providing civil engineering services for the City of Hollywood for the replacement of the structurally deficient three mast arms located at the northeast corner of N 26th Avenue and Polk Street, southeast corner of S 26th Avenue and Van Buren Street, and southwest corner of S 26th Avenue and Van Buren Street. This project also includes the removal of the driveway cut between Hollywood Boulevard and Van Buren Street. This driveway cut originally allowed traffic movement from Hollywood Boulevard eastbound to Van Buren Street westbound when Van Buren Street was a two-way, two lane roadway. When Van Buren Street was converted to a one-way, two lane roadway (eastbound), this driveway cut became nonfunctional and the City installed delineators. The work includes new mast arms; new conduit installation; controller cabinet modifications and/or replacement; new signing and pavement marking; restoration of pavement, sidewalks (including new curb and gutters and curb ramps), and sod; and appropriate drainage modifications.

Lift Stations and Force Main Condition Assessment. University of Florida. CMA is developing a sewer master plan for the University of Florida that includes a new gravity system, and new force main networks and lift stations. CMA is also handling the investigation and evaluation of the existing system that includes a hydraulic model of the sewer system, recommendations, and cost estimates. The evaluation of the existing sewer system includes documenting pipe layout and physical properties of sewage system, estimating sewage flows, inflow and infiltration analysis, documenting pump operating conditions at each lift station, and determining existing flow and pressures conditions throughout the existing force main networks. The hydraulic model of the sewer system is being developed in SewerCAD and includes gravity sewer pipes, pressurized pipes, and lift station network. Model results will be used to develop various system improvements alternatives for re-configuration of the sewer system and to determine its effectiveness. Cost estimates will be developed for the proposed recommendations.

Jennifer Smith, P.E.
GIS Engineer

Hire Date

05/30/2006

Years with other firms: N/A

Education

Bachelor of Science, Civil
 Engineering, Florida Atlantic
 Engineering, 2006

Registration

Professional Engineer,
 Florida, 72232, 2011

Professional Affiliations

American Society of Civil
 Engineers
 Florida Atlantic University
 Civil Engineering (CE)
 Department Advisory
 Florida Engineering Society
 Florida Water and
 Environmental Association
 Leadership Broward
 National Society of
 Professional Engineers

Certifications

SWMM training
 ICPR 3 and ICPR 4 Training
 Stormwater Management
 Inspector

Awards

ASCE Broward Branch of the
 Year under Jennifer's
 leadership as President of
 the branch - 2019
 ASCE Florida Young Engineer
 of the Year - 2019
 ASCE Region 5 Young Civil
 Engineer of the Year Award
 2020
 Most Active Broward ASCE
 Member - 2009
 Outstanding Engineering
 Achievement Merit Award
 by Palm Beach County
 Business Development
 Board 2021

Ms. Smith serves as a Principal Engineer for CMA's engineering team and has the technical experience necessary to accomplish the project goals related to the final deliverable. She has over 16 years of experience in civil engineering design, drafting, permitting, and construction inspection. Her design experience includes paving, drainage, stormwater management, water, sewer, and roadway design. She has prepared engineering drawings, cost evaluations, design reports, and various permit applications. She has been responsible for stormwater modeling and permitting on diverse public projects.

Project Experience

Broward County UAZ 110/111 & 113 Water Sewer Improvements 113B (RFP No. R1356803P1). Broward County. Broward County UAZ Water Sewer Improvements 113B, Lauderdale Lakes, FL. The UAZ 113B project included the improvements to the existing water distribution and sanitary sewer system within the City of Lauderdale Lakes, along with restoration of surface areas disturbed for the construction of the improvements. The project had a total area of 350 acres and included the installation of 42,700 linear feet of gravity sewer, 1,500 linear feet of forcemain, and 66,200 linear feet of watermain. The total project included 110,400 linear feet of pipe. Pipe installation took place along local city roads, as well as County and FDOT jurisdiction roadways including NW 31st Avenue, West Oakland Park Boulevard, and US-441. The existing water main consists of asbestos cement, cast iron, ductile iron, galvanized steel, and polyvinyl chloride pipe ranging from 2" - 24" in diameter size. The sanitary sewer consists of vitrified clay, fold and form liner, cured in place liner, and ductile iron pipe ranging from 8" - 18" in diameter size. The force main consists of asbestos cement, cured in place liner, ductile iron, and polyvinyl chloride pipe ranging from 6" - 8" in diameter size. County lift station 50M1 was rehabilitated as part of this project. The restoration of roadways, sidewalks, driveways, and landscape areas will need to be performed as needed for water and sanitary sewer improvement construction. CMA performed CEI services during construction and the project is currently in the close-out phase.

South Bermuda - Parkway Reuse Interconnect & Judge Farms Pipeline Project - Design & Construction - RFQu-21-047. Tohopekaliga Water Authority. CMA is providing professional services associated with the second phase of the South Bermuda-Parkway Reuse Interconnect and Judge Farms Pipeline Project. During this phase CMA will provide professional services for the surveying, geotechnical, design, permitting, and construction of approximately 8,000 LF of 20-inch and 3,000 LF of 12-inch reuse water transmission mains to interconnect the South Bermuda and Parkway Water Reclamation Facilities' reclaimed water systems. The previous phase encompassed the routing study and identified the preferred option.

GIS Update and Implementation Project - City of Wilton Manors - PO 23-1108. City of Wilton Manors. Update the City's existing GIS utility atlas to incorporate any missing utility system information, such as pipe material, pipe diameters, pipe age, pipe lining, valves, laterals, service lines, meters, and relevant lift station information. CMA will incorporate this missing utility system information based on available as-built record drawings provided by the City along with any recent GPS coordinates obtained by the City during recent system maintenance activities. CMA will also incorporate any recently completed projects, such as water main improvements, water valve

maintenance, gravity sewer lining, force main improvements, lift station improvements, and drainage improvements. CMA will also update the GIS databases to prepare for future uses for compliance under the NPDES Program and the CMOM Program. CMA will update the City's existing GIS data to allow for the transition into the GIS Online platform, which will provide easier access by the City in the future. CMA will conduct basic training of City staff for use of the GIS Online platform.

NPDES Permit Compliance Services 2019. City of Dania Beach. CMA is assisting the City of Dania Beach with the annual reporting pertaining to the Municipal Separate Storm Sewer Systems (MS4) NPDES Permit. CMA will create the City's GIS stormwater atlas; review the NPDES documentation; provide NPDES erosion and sedimentation control inspection training; and complete the NPDES Annual Report.

District 2 Wastewater Study. Brown & Caldwell. BCWWS has contracted Brown and Caldwell (B&C) and CMA to perform a study to identify areas throughout the District 2 sanitary sewer system that exhibit elevated chloride levels, which could potentially be caused by inflow and infiltration (I&I). BCWWS has noticed elevated chloride levels in wastewater effluent and wishes to proactively review potential sources. CMA will perform a study of the existing sewer system to determine if the source of the excess levels of chloride concentrations in the NRWTP are caused by the salinity inflow and infiltration. Tasks will include the following:

- Preliminary review of existing GIS sewer atlas
- Perform Testing at the master pump stations including installing data loggers and collecting grab samples to be sent to a lab to be analyzed for chloride concentration
- Analyze potential infiltration sites based on initial testing results and preliminary investigation of sanitary sewer system
- Perform additional testing with dataloggers and grab samples within the gravity sewer system in an effort to narrow the specific location of possible I&I
- Prepare Analysis Report to include all testing results with recommendations

2016/2017 City Engineering Services. City of Coral Springs. From 2005 to 2017, Chen Moore and Associates served as the City Engineer for Coral Springs. Beginning in February 2012, the firm also provided planning support for the City of Coral Springs Community Development Department. The firm performed the typical duties of an on-staff engineer and planner, including architectural review board compliance, DRC review for site plan compliance, engineering permit review and inspections, development reviews and concurrency evaluations, coordination with other City departments and outside agencies, and a variety of special projects. As part of this contract, the firm managed the vertical construction program for the City, including work for several departments including Police, Fire, Parks and Recs, Public Works, and the Fine Arts Center. To date, CMA still provides assistance to the Engineering Department.

One of the special projects was engineering assistance to the Community Development Division rewrite of the Land Development Code for the new provisions of redevelopment. As part of this rewrite, multiple sections of referenced code were reviewed and revised to meet both the intent of the City to keep their standards high and the needs of the development community for flexibility in dealing with existing conditions. CMA also updated the City's Engineering Standards including a special section on redevelopment.

CMA instituted a Municipal Separate Storm Sewer System (MS4) program for the City of Coral Springs and has been maintaining the program for several years. CMA provided training to the City's building department staff. Currently, CMA was also responsible for inspecting projects that require a MS4 permit in the City of Coral Springs. Inspections occurred following heavy rainfalls or on a monthly basis if rainfall has been minimal. As a co-permittee to Broward County through the state MS4 program, CMA completed a yearly report that ensures the City is in compliance with the requirements of the program.

CMA also digitized and added attribute data for a stormwater GIS and creating a field maintenance tracking tool for NPDES permit compliance. The City utility locator was trained in GIS to eventually take over the system.

**Benjamin Lehr, P.E., DBIA,
LEED AP
Transportation Engineer**

Hire Date

02/28/2022

Years with other firms: 22

Education

Master of Engineering,
Structural Engineering,
University of Florida, 2002
Bachelor of Engineering,
Civil Engineering, University
of Florida, 2000

Registration

Professional Engineer,
Florida, 63051, 2005

Professional Affiliations

American Road and
Transportation Builders
Association
American Society of Civil
Engineers
Design-Build Institute of
America

Certifications

LEED Accredited
Professional; U.S. Green
Building Council

Awards

Gary R. Consolazio, G.
Benjamin Lehr and Michael
C. McVay, "Dynamic Finite
Element Analysis of Vessel-
Pier-Soil Interaction During
Barge Impact Events," 2003
Northeast Florida Chapter of
Florida Engineering Society,
President's Award, For
outstanding leadership and
contribution to the growth
and success of the
MATHCOUNTS program and
competition, 2014
RS&H, Harold V. Aiken
Quality Award, for
recognition of dedication,
loyalty, and commitment to
quality exemplified through
professional service, 2013

Mr. Lehr as a transportation engineer is proficient with the preparation of the Transportation Element of comprehensive plans. He is also responsible for the pursuit and delivery of transportation and aviation related design-build projects across the United States. He is responsible for managing risks and promoting the use of best practices in pursuit and delivery of design-build projects nationwide. He has 22 years of experience in project management and structural design for numerous transportation related projects in Florida, Georgia, Mississippi, South Carolina, North Carolina, Texas, Virginia, West Virginia and Ohio.

Project Experience

A. Max Brewer Bridge Replacement PD&E Study; Brevard County; Titusville, FL; Structural Engineer. This project entailed a Preliminary Engineering Report and associated environmental documents for the replacement of the A. Max Brewer Bridge. Constructed in 1948, the existing bridge incorporates a swing span at the main channel and carries vehicle traffic over the Indian River. Main factors driving the need for replacement include structural deficiencies and functional obsolescence. Bridge alternatives included two- and four-lane high level structures (65-foot vertical clearance) parallel to the existing structure, as well as evaluation of the removal of the existing approach causeways and their replacement with elevated structure. Extreme coordination with the State Historic Preservation Officer (SHPO) and Brevard County Historical Society successfully developed a plan to document the history of the A. Max Brewer Bridge. Responsible for the bridge development report and analysis of all bridge rehabilitation and replacement alternatives.

CR 14A over Econfina River PD&E Study and Final Design; FDOT - District Two; Shady Grove, FL; Structural Engineer. PD&E and final design services for the replacement of a county-owned bridge carrying CR 14A over the Econfina River. The study required close coordinating with Taylor County and the development of a suitable detour plan to close the roadway during the bridge replacement, as the existing bridge is one lane. Responsible for writing and quality control of the Bridge Development Report, development of procedure for analysis and design of full height, U-Shaped abutments, and quality control for abutment design and plans.

East Central Regional Rail Trail PD&E Study; Volusia County; Central Florida, FL; Structural Engineer. PD&E study for the proposed 46-mile paved multi-use trail known as the East Central Regional Rail Trail (ECRRT). The ECRRT is the largest rails-to-trails purchase in Florida and will eventually connect with the proposed 230-mile St. Johns River to the Sea trail system. The objective of the study was to develop alignment and design alternatives for the proposed ECRRT. Concept development and evaluation of various design elements were prepared, including nine trailheads, ten "pocket" pavilions, six information kiosks, access management, and enhanced roadway crossing options. The proposed trail traverses through urbanized areas, while also providing access to rural areas consisting of scrublands, wetlands, and other natural resources. Numerous structures over creeks, water bodies, canals, and wetlands are also proposed. Developed multiple alternatives and cost estimates for the bridge crossings along the proposed trail route.

Edison Avenue over McCoys Creek PD&E Study and Final Design; FDOT - District Two; Jacksonville, FL; Project Oversight. This project replaced a city-

owned bridge carrying Edison Avenue over McCoy's Creek. The existing two-lane bridge is part of a historic resource group of early 20th century bridges in the vicinity and is adjacent to a city park. Consequently, the study required a Programmatic Section 4(f) Evaluation and close coordination with SHPO and the FHWA. The final design portion of the project entailed extensive utility involvement and the relocation of a major sanitary sewer line serving the adjacent historic neighborhood. Responsible for mentorship of structural team and performing quality control for structural design elements of the bridge and associated retaining walls.

SR 10A (Arlington Expressway) Mathews Bridge PD&E Study; FDOT - District Two; Jacksonville, FL; Structural Engineer. This project required the development of a Preliminary Engineering Report to examine capacity improvements on the Mathews Bridge crossing of the St. Johns River, the adjacent limited access Arlington Expressway to the east, and the City of Jacksonville downtown street system to the west. The report discusses the need for improvement, describes existing conditions, and defines design standards and criteria. In addition, the report discusses existing traffic and future forecasts, describes the No Build and Build Alternative evaluations, and selects and describes a Preferred Alternative. Preliminary analysis included the review of National Register of Historic Places eligibility, development of alternatives that comply with natural and biological constraints, evaluating previously completed traffic analyses (including hurricane/emergency evacuation needs) a community involvement program, and the development of roadway and bridge alternatives to satisfy future transportation demands. Responsible for the new bridge investigation study, load and resistance factor rating analysis of the existing Mathews Bridge, and preparation of cost estimates for new bridge construction and existing bridge rehabilitation.

SR 40 PD&E Study; FDOT - District Five; Ocala, FL; Lead Structural Engineer. PD&E study to evaluate the feasibility of widening a 40-mile segment of SR 40, including a portion which runs through the Ocala National Forest. The project involved evaluating impacts to wetlands, traffic noise impacts, preparation of NEPA documentation (EA/FONSI) in cooperation with the US Forest Service, and support for all public involvement activities. A conceptual engineering report was developed to identify areas of SR 40 that could benefit from roadway safety improvements, as well as wildlife crossing that provide under or overpasses for animals to avoid crossing SR 40. Additionally, the existing Ocklawaha River Bridge, built in the 1970s for the Cross Florida Barge Canal, was evaluated as part of the review to either rehabilitate or replace it with a new bridge. Responsible for the conceptual detailing and cost estimating for the Ocklawaha Bridge replacement alternatives and wildlife crossing alternatives, as well as final report development and public involvement. Mr. Lehr also developed cost estimates and preliminary concept plans for a timber boardwalk across the Silver River as part of the project's right-of-way mitigation plan.

Veterans Memorial Bridge Design-Build; FDOT - District Four; Palm City, FL. This project converted an existing two-lane neighborhood street into a four-lane divided arterial provides an important segment in the connection between Florida's Turnpike and US 1/SR 5. The centerpiece of the project is a new 3,100-foot, high-level Category 2 bridge structure built within a highly sensitive environmental corridor over the St. Lucie River. The design was completed on an accelerated schedule and all permit applications were submitted just 24 days after contract execution. The team achieved released-for-construction plans in just 9 months, greatly accelerating the project. Mr. Lehr was responsible for the project management of the design and post-design project phases, including seven subconsultants, as well as serving as the Structural Engineer-of-Record for the new bridge.

Center City Streetcar Corridor; Charlotte Area Transit System; Charlotte, NC; Structural Engineer. Mr. Lehr was selected by CATS as part of a consultant team that provided planning and engineering services for the design and construction of a streetcar system. The project team was responsible for the planning, design, and construction oversight of a 10-mile streetcar system with an estimated value of \$250 million. In Phase I, Mr. Lehr led the infrastructure design effort and supported the planning and public involvement portions of the project. In Phase II, Mr. Lehr assisted with final civil design for the proposed streetcar corridor. The Center City Streetcar is conceived as a "Portland" type streetcar system, utilizing modern vehicle technology based on the European "Tram" that is a smaller, lighter-weight vehicle than those used for "Light Rail Transit" and is capable of operating in the street with mixed traffic.

d. References

City of Westlake Visioning & New Land Development Regulations Westlake, Florida

Project Completion Date

2018

Fee

\$120,000

Client

City of Westlake

Kenneth Cassel, City Manager

4001 Seminole Pratt Whitney Rd.

Westlake, FL 33470

(561) 530-5880

kcassel@westlakegov.com

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP

Osniel Leon, AICP

Palm Beach County's 39th City was incorporated on June 20, 2016. The 38,000 acres of mostly vacant, previously agricultural land in western Palm Beach County will be the site of 4,500 homes and 2.2 million square feet of commercial space. This new city will provide much-needed urban services to the surrounding suburban residential areas. CMA has been the City's planning staff since 2016.

The CMA planning team wrote the new Zoning Code to be consistent with the City's Comprehensive Plan Vision with the following goals:

- Protect Residential Neighborhoods
- Provide Diversity of Housing
- Promote a Vibrant Mixed-Use District
- Support Employment Hubs
- Embrace Parks and Open Spaces

CMA was contracted by the City to provide general planning and zoning services. The consulting contract includes long range and current planning projects.

Researching, Identifying, and Recommending Amendments to Comprehensive Plan

- Small and Large Scale

Reviewing and Amending Land Development Regulations

- In-depth Analysis
- Write Code Text

Reviewing and processing Site Plan and Variance Applications

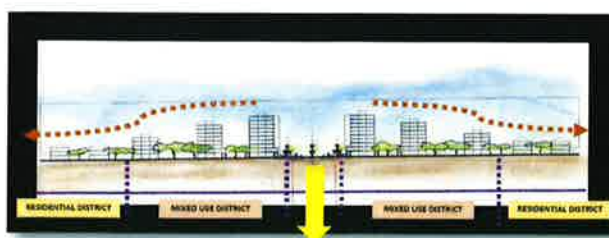
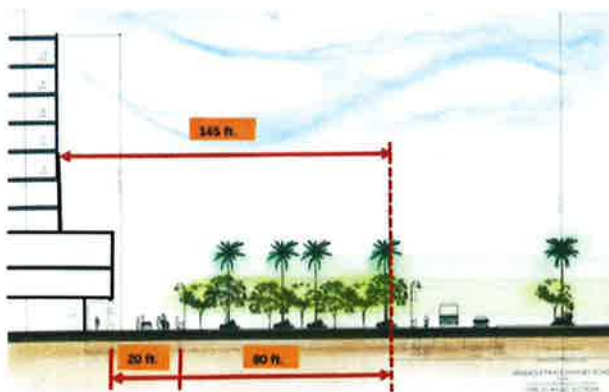
Conducting Development Review Committee Meetings

Preparing Staff Reports and Presentations

- Municipal Council
- Local Planning and Zoning Review Board

Code Compliance

- Conducting Site Inspections
- Receiving and Processing Complaints
- Preparing and Presenting Code Cases



City of Westlake Visioning & Comprehensive Plan Westlake, Florida

Project Completion Date

2018

Fee

\$85,000

Client

City of Westlake

Kenneth Cassel, City Manager

4001 Seminole Pratt Whitney Rd.

Westlake, FL 33470

(561) 530-5880

kcassel@westlakegov.com

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP

Osniel Leon, AICP

McKenna Page

Palm Beach County's 39th City was incorporated on June 20, 2016. The 38,000 acres of mostly vacant, previously agricultural land in western Palm Beach County will be the site of 4,500 homes and 2.2 million square feet of commercial space. This new city will provide much-needed urban services to the surrounding suburban residential areas.

The CMA planning team prepared the first comprehensive plan for the City of Westlake. The plan was adopted in 2018, and it is in compliance with Florida Statutes. The CMA planning team has been the City's planning staff since 2016. The team wrote the new Zoning Code to be consistent with the City's Comprehensive Plan Vision with the following goals:

- Protect Residential Neighborhoods
- Provide Diversity of Housing
- Promote a Vibrant Mixed-Use District
- Support Employment Hubs
- Embrace Parks and Open Spaces

CMA was contracted by the City to provide general planning and zoning services. The consulting contract includes long range and current planning projects.

CMA revised and updated each element to be in compliance with Florida Statutes and to provide a sustainable community. These elements included:

- Administrative
- Future Land Use
- Transportation
- Infrastructure
- Conservation
- Recreation & Open Space
- Housing
- Capital Improvements
- Intergovernmental Coordination
- 10 Year Water Supply Plan

Project Highlights

CMA was contracted by the City to provide general planning and zoning services in 2016. The consulting contract includes long range and current planning projects.

Researching, Identifying, and Recommending Amendments to Comprehensive Plan

- Small and Large Scale

Reviewing and Amending Land Development Regulations

- In-depth Analysis
- Write Code Text

Reviewing and processing Site Plan and Variance Applications

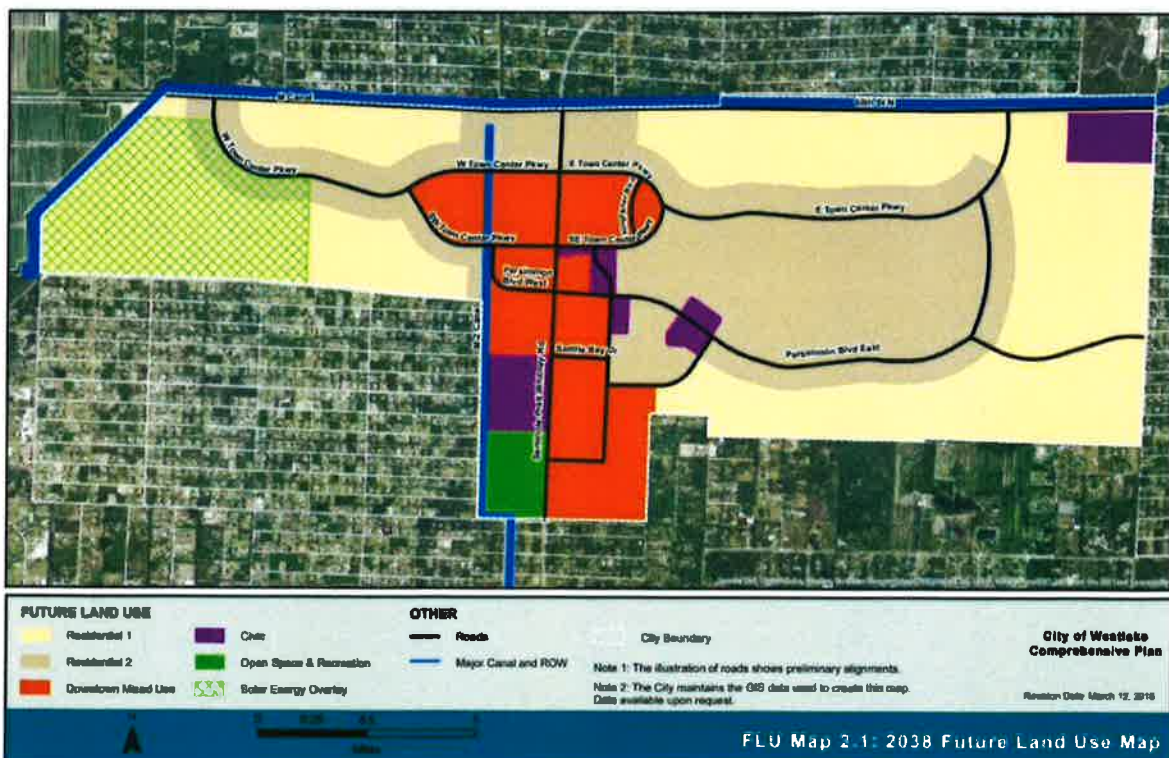
Conducting Development Review Committee Meetings

Preparing Staff Reports and Presentations

- Municipal Council
- Local Planning and Zoning Review Board

Code Compliance

- Conducting Site Inspections
- Receiving and Processing Complaints
- Preparing and Presenting Code Cases



Westlake City Engineering Services **Westlake, Florida**

Project Completion Date

2020

Fee

\$1,172,844

Client

City of Westlake

Kenneth Cassel

210 N. University Dr., Suite 702

Coral Springs, FL 33072

(561) 227-2272

Role

Prime

Key Personnel

Cristobal Betancourt, PLA

CMA is serving as City Engineer for the newly incorporated City of Westlake in Palm Beach County. CMA provides oversight and administration of engineering services, provides technical support for other City departments, assists in the site plan application and review process for engineering and landscape architecture design and overall quality control/quality assurance, including but not limited to technical review and approval of water, sewer, paving and drainage, landscape, hardscape and irrigation plans for compliance with applicable regulatory standards.



Village of Tequesta Visioning & Comprehensive Plan Update Tequesta, Florida

Project Completion Date

2018

Fee

\$60,000

Client

Village of Tequesta
Jeremy Allen, Village Manager
345 Tequesta Drive
Tequesta, FL 33469
(561) 768-0465

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP
Lance Lilly
McKenna Page



In April 2018, the Village of Tequesta Council adopted the fully updated EAR-based Comprehensive Plan. The CMA planning team revised and updated each element to be in compliance with Florida Statutes and provide a sustainable community. The State of Florida (Department of Economic Opportunity) found the subject plan in compliance with Florida Statutes. The Comprehensive Plan addressed Senate Bill 1040 Peril of Flood that applies to Coastal Communities.

A City's Land Development Regulations (LDRs) are the most important part of the land planning and regulation effort. LDRs are a community's legislative instrument for preventing harm, protecting property values, preventing negative aesthetic impact, protecting and promoting public welfare, and promoting economic growth. Updates become necessary to accommodate changes in boundaries, land uses, legal constraints, and shifting political priorities. The CMA planning team has amended the Village of Tequesta's LDRs to introduce "place of assembly" use, introduce "rehabilitation facility" as a special exception use, and provide regulations for outdoor seating at restaurants.

The CMA planning team prepared the EAR-based (Evaluation and Appraisal Report) Comprehensive Plan Amendment for the Village of Tequesta. The Comprehensive Plan encompasses the following elements:

- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation & Open Space
- Intergovernmental Coordination
- Coastal Management
- Capital Improvement

City of Lake Worth Beach Visioning & Land Development Regulations Lakeworth Beach, Florida

Project Completion Date

2018

Fee

\$130,000

Client

City of Lakeworth Beach

William Waters, Community Sustainability Director

1900 2nd Ave N

Lake Worth, FL 33461

(561) 586-1634

wwaters@lakeworthbeachfl.gov

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP

The City of Lake Worth Beach initiated a proactive marketing campaign to promote redevelopment and publicize its newly adopted Land Development Regulations (LDRs). The CMA planning team supplied high-impact graphics, data and analysis, GIS mapping, and presentation materials to attract investment into the City. CMA's campaign included site maps showing possible development scenarios; architectural 3-D illustrations portraying site design options, building elevations, and street views. This outreach initiative included public engaging forums with the community, developers, and potential investors.



Lake Worth Beach Visioning & Sustainable Comprehensive Plan Update

Lakeworth Beach, Florida

Project Completion Date

2018

Fee

\$165,000

Client

City of Lakeworth Beach

William Waters, Community Sustainability Director
1900 2nd Ave N

Lake Worth, FL 33461

(561) 586-1634

wwaters@lakeworthbeachfl.gov

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP



CMA was hired, in 2016, by the City of Lake Worth Beach. The City determined it was necessary to conduct a review and evaluation of its current Comprehensive Plan to reflect changes in state requirements, current City's conditions, challenges, and future community trends. Pursuant to Chapter 163.3191, Florida Statutes (F.S.), local governments are required to evaluate their local comprehensive plan every seven years to determine if plan amendments are necessary since the last update of the Comprehensive Plan and notify the State Land Planning agency as to its determination.

To prepare the subject amendments, the City contracted CMA to work with the Sustainability Department as well as other City's Departments. The Comprehensive Plan update focused on strengthening Lake Worth Beach as a sustainable community incorporates multi-modal transportation network; compact, walkable, mixed-use patterns of development; provision of civic spaces and interconnected open spaces for recreation; economic vitality and job choices; diversify its housing supply; and a robust educational system.

The City of Lake Worth Beach initiated a proactive marketing campaign to promote redevelopment and publicize its newly adopted Land Development Regulations (LDRs). The CMA planning team supplied high-impact graphics, data and analysis, GIS mapping, and presentation materials to attract investment into the City. The firm's campaign included site maps showing possible development scenarios; architectural 3-D illustrations portraying site design options, building elevations, and street views. This outreach initiative included public engaging forums with the community, developers, and potential investors.

The proposed Comprehensive Plan amendment encompasses the following eleven (11) elements including a new element-Economic Development-and the addition of Neighborhoods to the existing Housing Element:

- Future Land Use
- Transportation
- Housing & Neighborhoods
- Infrastructure
- Coastal Management
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement
- Public School Facilities
- Economic Development

Manalapan Town Planning **Manalapan , Florida**

Project Completion Date

2022

Fee

\$55,000

Client

Town of Manalapan

Linda Stumpf, Town Manager

600 South Ocean Blvd

Manalapan, FL 33462

(561) 585-9477

lstumpf@manalapan.org

Role

Prime

Key Personnel

Nilsa Zarcarias, AICP

The CMA planning team has been providing planning and zoning services to the Town of Manalapan since 2015. The team is responsible for site plan reviews, comprehensive plan updates and zoning code amendments.

The CMA planning team also prepared the Community Rating System report for the Town of Manalapan including the following information :

- Public Information
- Mapping and Regulations
- Flood Damage Reduction
- Warning and Response

In 2022, the CMA Team conducted a Comprehensive Plan Update to the Coastal Management element. The subject project included amendments to the policies .



Mangonia Park Vision, Comprehensive Plan & Land Development Regulations Mangonia Park, Florida

Project Completion Date

2020

Fee

\$45,000

Client

Town of Mangonia Park
Ken Metcalf, Town Manager
1755 East Tiffany Drive,
Mangonia Park, FL 33407
(561) 848-1235
kmetcalf@tompfl.com

Role

Prime

Key Personnel

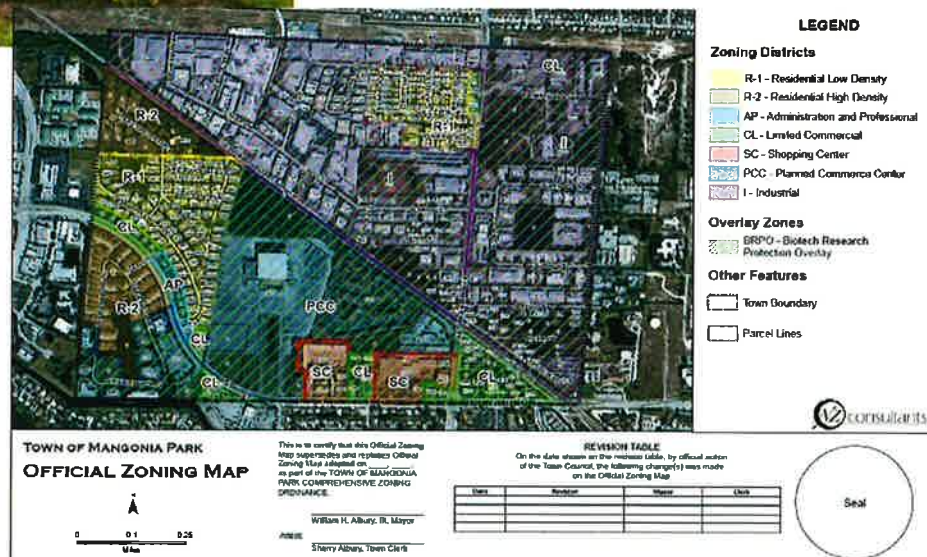
Nilsa Zarcarias, AICP
Osniel Leon, AICP

CMA was contracted by the Town of Mangonia Park to update their comprehensive plan. The CMA planning team prepared the EAR based (Evaluation and Appraisal Review) Comprehensive Plan Amendment for the Town of Mangonia Park.

Florida Statutes require that each local government within the state must prepare, adopt, and submit an Evaluation and Appraisal Review of its comprehensive plan at least every seven years. This EAR based amendment should address changes in the state requirements and changes to local conditions since the last update of the comprehensive plan. In 2020, the Mangonia Park comprehensive plan prepared by the CMA planning team was adopted.

The Comprehensive Plan consists of the following elements:

- Introduction and Administration
- Future Land Use
- Transportation
- Housing
- Utilities
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement Element



Hawthorne Rd Corridor Improvements Gainesville, Florida

Project Completion Date

2013

Fee

\$22,550

Client

Gainesville Community Redevelopment Agency

Sarah Vidal-Finn, Senior Analyst

802 NW 5th Avenue

Gainesville, FL 32601

(352) 334-2205

vidalsc@gainesvillecra.com

Role

Prime

Key Personnel

Cristobal Betancourt, PLA

CMA was contracted by the Gainesville Community Redevelopment Agency to create this visioning document for the Hawthorne Road Corridor from the Eastside Gateway feature (at approximately SE 14th Street) to SW 24th Street. This task included three main sub-tasks:

- Assess the infrastructure in the corridor and identify any deficient infrastructure that could impede redevelopment;
- Analyze current and future land uses and zoning to identify where current uses or zoning could impede redevelopment of adjacent parcels, and;
- Provide a Final Concept Plan for the Corridor to include overall pedestrian, bicycle, and motor vehicle circulation; hardscape treatments (paving, bus shelters, benches, trash receptacles, etc); lighting standards; and signage.



**Design Criteria Professional Services
for Winter Garden FS DCP Services
with Bentley Architects & City of
Winter Garden - RFQ EN19-030
Winter Garden, Florida**

Project Completion Date

2020

Fee

\$11,274

Client

Bentley Architects + Engineers

Gary Kranston, RA, AIA, NCARB, Vice President
Architecture

651 W. Warren Ave, Suite 200

Longwood FL 32750

(407) 331-6116 ext 104

gary@baeonline.com

Role

Subconsultant

Key Personnel

Jason Sutton, PLA, CA

CMA is a subconsultant to Bentley Architects and Engineers for developing a Design Criteria Package for the City of Winter Garden's Fire Station 21. CMA is responsible for developing the landscape and irrigation criteria for the project. CMA's scope includes developing a concept plan for the landscape and irrigation components.



Broward County UAZ Water Sewer Improvements

Lauderdale Lakes, Florida

Project Completion Date

2019

Fee

\$11,171,568

Client

Broward County

Michael Hagerty, P.E., LEED AP, Engineering Unit Supervisor, Water and Wastewater

2555 West Copans Road

Pompano Beach, FL 33069-1233

(954) 831-0901

MHAGERTY@broward.org

Role

Prime

Key Personnel

Jennifer Smith, P.E.

Cristobal Betancourt, PLA



UAZ 307 / 315 - The Broward County UAZ 307 / 315 Utilities project included replacing existing water main and providing sanitary sewer for County Service Areas in the City of Dania Beach, near Griffin Road and Ravenswood Road. The main technical components included replacing a 12-inch water main on Ravenswood Road, replacing the residential water distribution system, providing sanitary sewer to connect existing septic tanks and rehabilitating and installation of new lift stations and force main. In order to achieve the necessary information, site visits concentrated on contacting residents to determine the location of existing tanks. A great deal of coordination was required to accommodate developer projects, tie into County projects, and obtain easements for crossing private properties. GIS was used to keep track of all ongoing projects and determine/update projected utility flow rates. A total of 20,000 linear feet of water main replacement, three lift stations and 14,000 linear feet of sanitary sewer, which serviced over 400 parcels, were designed for this project. Chen Moore and Associates also performed construction administration for this project.

UAZ 303, 314, 316 and 318 - The Broward County UAZ 303, 314, 316 and 318 project was part 1 of what was projected to be an \$8.8 million project replacing existing water and providing sanitary sewer for County Service Areas in the City of Dania Beach, just east of State Road 7, north and south of Griffin Road. The main technical components included replacing 12-inch water mains on County roads, replacing the residential water distribution system, providing sanitary sewer systems to eliminate existing septic tanks, and rehabilitating or installing new lift stations. In order to obtain the necessary information, site visits concentrated on contacting residents to determine the location of existing tanks. A great deal of coordination was required to accommodate developer projects, tie into County projects and obtain easements for crossing private properties. GIS was used to keep track of all ongoing projects, log pertinent site information, determine the projected flow rates, track questions from residents of the area and track responses from utility companies regarding their existing facilities. The design of these improvements began in January 2009 and construction has been completed. Chen Moore and Associates also performed construction administration for this project.

UAZ 316 - The Broward County UAZ 316 project is part 2 of the estimated \$8.8 million project servicing Broward County utility zones in the City of Dania Beach which includes replacing existing water and providing sanitary sewer just east of State Road 7, and south of Griffin Road. The main technical components include replacing 12-inch water mains on County Roads, replacing the residential water distribution system, providing sanitary sewer systems to eliminate existing septic tanks and rehabilitating or installing new lift stations. In order to obtain the necessary information, site visits concentrated on contacting residents to determine the location of existing tanks. A great deal of coordination was required to accommodate developer projects, tie into County projects and obtain easements for crossing private properties. GIS was used to keep track of all ongoing projects, determine the projected flow rates, track questions from residents of the area and track responses from utility companies regarding their existing facilities. Design of these improvements began in 2009 and construction was completed in 2016. Chen Moore and Associates also performed construction administration for this project.

Broward County UAZ 110/111 & 113 Water Sewer Improvements 113A / Broward County UAZ 110/111 & 113 Water Sewer Improvements 113B - The Water and Sanitary Sewer Improvements for the UAZ 110/111 & 113 Project included the improvements to the existing water distribution system, sanitary sewer system, and transmission systems within the project area along with the restoration of surface areas disturbed for the construction of said improvements. All projects combined



a total area of over 1000 acres within multiple Cities. The existing system replaced consists of approximately 168,100 LF of water mains, 122,100 LF of sanitary sewer mains, and 23,600 LF force main. The existing water main consists of asbestos cement, cast iron, ductile iron, galvanized steel, and polyvinyl chloride pipe ranging from 2" - 24" in diameter size. The sanitary sewer consists of vitrified clay, fold and form liner, cured in place liner, and ductile iron pipe ranging from 8" - 15" in diameter size. The force main consists of asbestos cement, cured in place liner, ductile iron, and polyvinyl chloride pipe ranging from 6" - 16" in diameter size. There are 8 Broward County lift stations in these UAZ areas and 1 private lift station which sanitary sewer systems will need to connect to. Two of these stations will need rehabilitation/replacement. The restoration of roadways, sidewalks, driveways, and landscape areas will need to be performed as needed for water and sanitary sewer improvement construction.

The project is scheduled to be completed on time and within budget. The Water and Sanitary Sewer Improvements for the UAZ 110/111 & 113 Project will include the improvements to the existing water distribution system, sanitary sewer system, and transmission systems within the project area along with the restoration of surface areas disturbed for the construction of said improvements. All projects combined totaled an area of over 1000 acres within multiple Cities. CMA is currently providing CEI services for the project.



Veterans Memorial Bridge Design- Build, FDOT District 4 Palm City, FL

Project Completion Date

2015

Fee

\$

Client

Martin County

Lisa Wichser, County Engineer

2401 SE Monterey Road

Stuart, FL 34996

(727) 223-7495

lwichser@martin.fl.us

Role

Prime

Key Personnel

Benjamin Lehr, P.E., DBIA, LEED AP

This project converted an existing two-lane neighborhood street into a four-lane divided arterial provides an important segment in the connection between Florida's Turnpike and US 1/SR 5. The centerpiece of the project is a new 3,100-foot, high-level Category 2 bridge structure built within a highly sensitive environmental corridor over the St. Lucie River. The design was completed on an accelerated schedule and all permit applications were submitted just 24 days after contract execution. The team achieved released-for-construction plans in just 9 months, greatly accelerating the project. Mr. Lehr was responsible for the project management of the design and post-design project phases, including seven subconsultants, as well as serving as the Structural Engineer-of-Record for the new bridge.

Mr. Lehr worked on this project while with another firm.



e. Project timetable

b.

PROJECT TASKS		MONTHS											
		1	2	3	4	5	6	7	8	9	10	11	12
Project Kick-Off and Coordination with City Staff													
1 Existing Conditions Analysis													
2 Coordination with Committee													
3 Public Engagement													
Individual Interviews/Meetings with Committee members, City Staff and City Leaders, and Community Key Stakeholders													
Community Open Houses, and Workshops, Public Hearings													
Community Survey, QR Code, Flyers													
City's Website, Social Media													
Prepare Summary of Public Engagement Outcome													
4 Review and Update each Element (GOPs; Data and Analysis; and Maps)													
Introduction Chapter													
1. Future Land Use													
2. Housing													
3. Transportation													
4. Infrastructure													
5. Recreation and Open Space													
6. Conservation													
7. Intergovernmental Coordination													
8. Capital Improvements													
9. Public School Facilities													
10. Private Property Rights (Required New Element by F.S.)													
11. Proposed New Elements based on the recommendations of the Committee, City Staff, City Leaders, and Public Engagement (For example: Economic Development, Healthy Community, Resiliency, etc.)													
12. Map Series													
5 Approval Process and Final Deliverables													
LPA Hearing													
Council Transmittal Hearing													
Transmittal to DEO and Other Agencies (Seven Agencies)													
ORC Report Responses if Needed													
Council Adoption Hearing and Transmittal to DEO and other Agencies													
Deliver to the City all documents according to the RFP and Proposal													

Note: CMA will adjust the proposed timeline to fulfill the City's schedule and goals.



Draft Submittals for Review and Comments

Section 1



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

01/19/2023

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 PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or 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).

PRODUCER LassiterWare LLC 1300 N. Westshore Blvd. Suite 110 Tampa FL 33607		CONTACT NAME: Wendy Tyree PHONE (A/C, No, Ext): (800) 845-8437 FAX (A/C, No): (888) 883-8680 E-MAIL ADDRESS: wendyt@lassiterware.com																						
INSURED Chen Moore & Associates, Inc. d/b/a CMS 500 W. Cypress Creek Road Suite 630 Fort Lauderdale FL 33309		<table border="1"> <thead> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A:</td> <td>Crum & Forster Specialty Insurance Co</td> <td>44520</td> </tr> <tr> <td>INSURER B:</td> <td>Travelers Cas Ins Co of Amer</td> <td>19046</td> </tr> <tr> <td>INSURER C:</td> <td>Travelers Casualty & Surety Co</td> <td>19038</td> </tr> <tr> <td>INSURER D:</td> <td></td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A:	Crum & Forster Specialty Insurance Co	44520	INSURER B:	Travelers Cas Ins Co of Amer	19046	INSURER C:	Travelers Casualty & Surety Co	19038	INSURER D:			INSURER E:			INSURER F:		
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INSURER C:	Travelers Casualty & Surety Co	19038																						
INSURER D:																								
INSURER E:																								
INSURER F:																								

COVERAGES

CERTIFICATE NUMBER: 23-24 Cert

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVO	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Contractors Pollution Liability GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		EPK142287	01/01/2023	01/01/2024	EACH OCCURRENCE \$ 1,000,000
	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000						
	MED EXP (Any one person) \$ 5,000						
	PERSONAL & ADV INJURY \$ 1,000,000						
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BA2W1500872247G	12/16/2022	12/16/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	BODILY INJURY (Per person) \$						
	BODILY INJURY (Per accident) \$						
	PROPERTY DAMAGE (Per accident) \$						
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DEF: RETENTION \$			EFX121958	01/01/2023	01/01/2024	EACH OCCURRENCE \$ 5,000,000
	AGGREGATE \$ 5,000,000						
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	UB2W148891	12/16/2022	12/16/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Liability (Claims-Made) Limits included with General Liability			EPK142287	01/01/2023	01/01/2024	Each Claim \$1,000,000
	Aggregate \$2,000,000						

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

The City, its employees, agents, officials and volunteers are included as additional insured under the terms and conditions of the attached forms on the General Liability policy, when additional insured status is required by written contract. Cancellation: Thirty (30) days' notice except for Ten (10) days' notice for non-payment of premium.

CERTIFICATE HOLDER

CANCELLATION

City of Belle Isle 1600 Nela Avenue Belle Isle FL 32809	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
---	---

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ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD

AGENCY CUSTOMER ID: _____

b.

LOC #: _____

**ADDITIONAL REMARKS SCHEDULE**

Page ____ of ____

AGENCY LassiterWare LLC		NAMED INSURED Chen Moore & Associates, Inc.	
POLICY NUMBER			
CARRIER	NAIC CODE	EFFECTIVE DATE:	

ADDITIONAL REMARKS**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,****FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance: Notes

*Excess Liability extends over the underlying General Liability, Contractors Pollution Liability, Automobile Liability, Professional Liability and Workers' Compensation per the terms and conditions of the policies.

All supporting endorsement(s) and policy form(s) attached, if any, comprise the Certificate of Liability Insurance in its entirety. Please review these endorsement(s) and policy form(s) as certain coverage provided by them may only apply when a written contract or agreement between the parties requires such coverage be provided.

The attached page(s) noting additional terms, conditions, coverage and/or comments applies.

**CRUM & FORSTER***
A TAIHEAS COMPANY

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART
CONTRACTORS POLLUTION LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) or Organization(s)
Blanket when specifically required in a written contract with the named insured.

SECTION III – WHO IS AN INSURED within the Common Provisions is amended to include as an additional insured the person(s) or organization(s) indicated in the Schedule shown above, but only with respect to liability caused, in whole or in part, by "your work" for that insured which is performed by you or by those acting on your behalf.

ALL OTHER TERMS AND CONDITIONS OF THE POLICY REMAIN UNCHANGED.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS –
COMPLETED OPERATIONS**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name of Additional Person(s) or Organization(s):	Location And Description Of Completed Operations
Blanket when specifically required in a written contract with the named insured.	Blanket when specifically required in a written contract with the named insured.
Information required to complete this Schedule, if not shown above, will be shown in the Declarations.	

A. Section III – Who Is An Insured within the Common Provisions is amended to include as an insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury" or "property damage" caused, in whole or in part, by "your work" at the location designated and described in the schedule of this endorsement performed for that additional insured and included in the "products-completed operations hazard".

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

DESIGNATED PERSON OR ORGANIZATION – NOTICE OF CANCELLATION PROVIDED BY US

This endorsement modifies insurance provided under the following:

ALL COVERAGE PARTS INCLUDED IN THIS POLICY

SCHEDULE

CANCELLATION:

Number of Days Notice:

30

PERSON OR

ORGANIZATION: ANY PERSON OR ORGANIZATION TO WHOM YOU HAVE AGREED IN A WRITTEN CONTRACT THAT NOTICE OF CANCELLATION OF THIS POLICY WILL BE GIVEN, BUT ONLY IF:

1. YOU SEND US A WRITTEN REQUEST TO PROVIDE SUCH NOTICE, INCLUDING THE NAME AND ADDRESS OF SUCH PERSON OR ORGANIZATION, AFTER THE FIRST NAMED INSURED RECEIVES NOTICE FROM US OF THE CANCELLATION OF THIS POLICY; AND
2. WE RECEIVE SUCH WRITTEN REQUEST AT LEAST 14 DAYS BEFORE THE BEGINNING OF THE APPLICABLE NUMBER OF DAYS SHOWN IN THIS SCHEDULE.

ADDRESS:

THE ADDRESS FOR THAT PERSON OR ORGANIZATION INCLUDED IN SUCH WRITTEN REQUEST FROM YOU TO US.

PROVISIONS

If we cancel this policy for any legally permitted reason other than nonpayment of premium, and a number of days is shown for Cancellation in the Schedule above, we will mail notice of cancellation to the person or organization shown in such Schedule. We will mail such notice to the address shown in the Schedule above at least the number of days shown for Cancellation in such Schedule before the effective date of cancellation.

POLICY NUMBER: UB-2W148891-22-47-G

NOTICE OF CANCELLATION TO DESIGNATED PERSONS OR ORGANIZATIONS

The following is added to PART SIX – CONDITIONS :

Notice Of Cancellation To Designated Persons Or Organizations

If we cancel this policy for any reason other than non-payment of premium by you, we will provide notice of such cancellation to each person or organization designated in the Schedule below. We will mail or deliver such notice to each person or organization at its listed address at least the number of days shown for that person or organization before the cancellation is to take effect.

You are responsible for providing us with the information necessary to accurately complete the Schedule below. If we cannot mail or deliver a notice of cancellation to a designated person or organization because the name or address of such designated person or organization provided to us is not accurate or complete, we have no responsibility to mail, deliver or otherwise notify such designated person or organization of the cancellation.

SCHEDULE

Name and Address of Designated Persons or Organizations:	Number of Days Notice
ANY PERSON OR ORGANIZATION TO WHOM YOU HAVE AGREED IN A WRITTEN CONTRACT THAT NOTICE OF CANCELLATION OF THIS POLICY WILL BE GIVEN, BUT ONLY IF: 1. YOU SEND US A WRITTEN REQUEST TO PROVIDE SUCH NOTICE, INCLUDING THE NAME AND ADDRESS OF SUCH PERSON OR ORGANIZATION, AFTER THE FIRST NAMED INSURED RECEIVES NOTICE FROM US OF THE CANCELLATION OF THIS POLICY, AND 2. WE RECEIVED SUCH WRITTEN REQUEST AT LEAST 14 DAYS BEFORE THE BEGINNING OF THE APPLICABLE NUMBER OF DAYS SHOWN IN THIS SCHEDULE.	30

ADDRESS:
THE ADDRESS FOR THAT PERSON OR
ORGANIZATION INCLUDED IN SUCH WRITTEN
REQUEST FROM YOU TO US.

All other terms and conditions of this policy remain unchanged.

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.

(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective
Insured

Policy No.

Endorsement No.
Premium \$

Insurance Company

Countersigned by _____

DATE OF ISSUE: 12-20-22 ST ASSIGN:

Page 1 of 1

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Appendix B
NONCOLLUSION AFFIDAVIT

I state that I am President of Chen Moore and Associates, Inc.
(TITLE) (NAME OF FIRM)

and that I am authorized to make this affidavit on behalf of my firm, and its owners, directors, and officers. I am the person responsible in my firm for the price(s) and the amount of this bid.

I state that

1. The price(s) and amount(s) of this bid have been arrived at independently and without consultation, communication or agreement with any other contractor, bidder, or potential bidder.
2. Neither the price(s) nor the amount(s) of this bid, and neither the approximate price(s) nor approximate amount(s) of this bid, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before bid opening.
3. No attempt has been made or will be made to induce any firm or person to refrain from bidding on this contract, or to submit a bid higher than this bid, or to submit any intentionally high or noncompetitive bid or other form of complementary bid.
4. The bid of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive bid.
5. Chen Moore and Associates, Inc. its affiliates, subsidiaries, officers, directors, and
(NAME OF FIRM)

employees are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

I state that Chen Moore and Associates, Inc. understands and acknowledges that the
(NAME OF FIRM)

above representations are material and important, and will be relied on by City of Belle Isle in awarding the contract(s) for which this bid is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from City of Belle Isle of the true facts relating to the submission of bids for this contract.



Chen Moore and Associates, Inc.
(NAME OF FIRM)

Peter Moore, P.E., F.ASCE, FACEC
(SIGNATURE)

Witnessed before me this

9th Day of February, 2023.

My commission expires JANUARY 24, 2026

Appendix C

NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization or business entity represented herein shall not discriminate against any person in its operations, activities or delivery of services under any agreement it enters into with the City of Belle Isle. The same shall affirmatively comply with all applicable provisions of federal, state and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

It is the policy of the City of Belle Isle that Minority/Women - Owned Business Enterprises (MWBE) shall have the maximum opportunity to participate in all contracts. The City of Belle Isle will accept MWBE certifications from Orange County and any State of Florida certification.

Further, City Purchasing Police Section 1.8 requires that all contracting agencies of the City, or any department thereof, acting for or on behalf of the City, shall include in all contracts and property contracts hereinafter executed or amended in any manner or as to any portion thereof, a provision obligating the contractor not to unlawfully discriminate (as proscribed by federal, state, county, or other local law) on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, sexual orientation, gender identity or expression, marital status, pregnancy, familial status, veterans status, political affiliation, or physical or mental disability and such person's association with members of classes protected under this chapter or in retaliation for or opposition to any practices forbidden under this chapter against any employee of, any City employee working with, or applicant for employment with such contractor and shall require such contractor to include a similar provision in all subcontracts executed or amended there under.

By: Peter Moore, P.E., F.ASCE, FACEC

Title: President

STATE OF FLORIDA
COUNTY OF Orange

Sworn to and subscribed before me this 9th day of February, 2023, by

[Signature]
Signature of Notary Public

☒ Personally known, or
☐ Produced Identification

Type of ID Produced: _____



NON-DEBARMENT AFFIDAVIT

Peter Moore, P.E., F.ASCE, FACEC Being first duly sworn, deposes and says that:

He/She is President of Chen Moore and Associates, Inc. the Proposer ("Respondent") that has

submitted the attached Proposal. By offering a submission to this RFP, the Respondent certifies and affirms that to the best of his/her knowledge and belief, that:

1. The Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any transaction of any Federal, state or local agency; and
2. The Respondent has not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records; making false statements; or receiving stolen property; and
3. The Respondent is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph 2 of this affidavit; and
4. The Respondent has not within a three-year period preceding this proposal had one or more public transactions (Federal, State or local) terminated for cause or default; and
5. The Respondent will submit a revised Debarment Affidavit immediately if the status changes.

If the Respondent cannot certify that he/she is not debarred, he/she shall provide an explanation with this submittal. An explanation will not necessarily result in denial of participation in a contract. Failure to submit a debarment affidavit will disqualify the contractor from the award of any contract.

_____ Check here if an explanation is attached to this affidavit.

By: 

Print Name: Peter Moore, P.E., F.ASCE, FACEC

Title: President

Date: February 9, 2023

STATE OF FLORIDA)
COUNTY OF Orange)

The foregoing Agreement was acknowledged before me this 9th day of
February, 2023, by _____, who has affirmed
that he/she has been duly authorized to execute the above document. He/she is personally
known to me or has produced _____ as identification.

NOTARY'S SEAL:



NOTARY PUBLIC, STATE OF FLORIDA

Johanna Zona

Name of Acknowledger, typed, printed, or
Stamped

Appendix E

DRUG-FREE WORKPLACE CERTIFICATION

Preference must be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program, a business shall:

- 1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- 2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- 3) Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- 4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- 5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- 6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Chen Moore and Associates, Inc.

COMPANY NAME

VENDOR'S SIGNATURE

Must be executed and returned with attached proposal to be considered.

Appendix F

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Peter Moore, P.E., F.ASCE, FACEC, on behalf of Chen Moore and Associates, Inc.

Print Name and Title

Company Name

certify that Chen Moore and Associates, Inc. does
not:

Company Name

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. The City shall provide notice, in writing, to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S. or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Chen Moore and Associates, Inc.

COMPANY NAME
Peter Moore, P.E., F.ASCE, FACEC

PRINT NAME
President

TITLE


SIGNATURE

Must be executed and returned with attached proposal to be considered

COMPREHENSIVE PLAN

POLICY DOCUMENT
*Goals, Objectives,
& Policies*

FUTURE LAND USE ELEMENT

WELCOME TO THE
VILLAGE OF
TEQUESTA

VILLAGE OF TEQUESTA COMPREHENSIVE PLAN

FUTURE LAND USE ELEMENT

- Goal: 1.0.0** *Provide for the development and redevelopment of suitable and compatible land uses which will preserve, enhance, and promote strong sense of community within the established character of the Village of Tequesta, which will encourage sustainability and protect its natural resources.*
- Objective: 1.1.0** *Coordinate all future land use decisions with the appropriate topography and soil conditions, the availability of facilities and services and land use designations as per the Future Land Use Map.*
- Policy: 1.1.1** Continue to maintain regulations (subdivisions, zoning, signage etc.) which guide future land use configurations so as to preserve topography and soils; require facilities and services; and, protect against seasonal and periodic flooding.
- Policy: 1.1.2** The Village’s Land Development Regulations shall conform to, and implement, the use, density and intensity standards as outlined on Table FLU-1 below:



Table FLU-1. Future Land Use Districts, Density and Intensity Standards

District	Uses	Maximum Density and Intensity
Low Density Residential	Residential units	5.4 units per acre
Medium Density Residential	Residential units	12 units per acre
Commercial	Activities related to the sale, lease or distribution of products and/or the provision of services	Floor Area Ratio of 2.0
Recreation and Open Space	Active or passive recreational uses	Floor Area Ratio of .10
Public Buildings and Grounds	Land and structures owned, leased or operated by a government entity, and/or privately owned but used for a public purpose	Floor Area Ratio of 2.0
Other Public Facilities	Public or private facilities or institutions such as churches, schools, fraternal organizations, and nursing homes	Floor Area Ratio of 2.0
Conservation	Land used for the conservation and preservation of natural resources	Floor Area Ratio of .10
Mixed Use	A mix of: single and multi-family residential uses; small scale retail sales and services, business services and professional services primarily designed to serve residential neighborhoods, and; recreation and open space	18 dwelling units per acre, 18 dwelling units per acre in an Adult Congregate Living Facility. Maximum Floor Area Ratio of 4.2 for non-residential uses and mixed use buildings. Residential uses shall comprise no less than 20 percent and no more than 80 percent of a mixed-use district. 8 Units per acre for Rehabilitation Facility (Ord. 2-14)



Policy: 1.1.3	Coordinate and support Palm Beach County and Martin County in the protection of potable water well fields, and in the implementation of applicable well field protection programs.
Objective: 1.2.0	<i>Continue to monitor conditions in the Village in order to identify redevelopment and infill areas.</i>
Policy: 1.2.1	There are no residential blighted areas within the Village of Tequesta. However, the Village will, wherever and whenever appropriate, cooperate with other local governments in these efforts to redevelop and renew such areas in their respective jurisdictions.
Policy: 1.2.2	Encourage redevelopment of commercial plazas to support economic development efforts and sustainable planning practices.
Policy: 1.2.3	Support mixed use designations on main corridors to promote a vibrant economy and walkability.
Objective: 1.3.0	<i>Prohibit land uses which are inconsistent with the community's character and future land uses.</i>
Policy: 1.3.1	Through the implementation of planned unit development, mixed-use and other innovative regulations, encourage the development of housing types within a physical setting that permit both comfortable and creative living, while affording both privacy and sociability.
Policy: 1.3.2	Maintain the quality of existing single family neighborhoods by prohibiting commercial and high density residential development in these areas.
Policy: 1.3.3	Support consistent quality of design and protect existing neighborhood integrity, character and environmental resources.
Policy: 1.3.4	Continue to monitor aesthetic and architectural initiatives through the Planning and Zoning Board and applicable local regulations.
Policy: 1.3.5	Implement height limitations in accordance with the Land Development Regulations.
Policy: 1.3.6	Maintain residential densities in accordance with the standards prescribed in Table FLU-1 and the Land Development Regulations.
Policy: 1.3.7	Require adequate parking, suitably arranged and attractively landscaped, in all developments.



- Policy: 1.3.8 Commercial developments shall be developed in a manner that will compatibly serve the community's needs by restricting their location to those areas indicated on the Future Land Use Map.
- Policy: 1.3.9 Strive for compatible developments and redevelopments that will benefit the Village and compliment the aesthetic character of the community.
- Policy: 1.3.10 Require signs that are visually attractive and low-key through implementation of Village sign regulations.
- Policy: 1.3.11 Require parking areas that are generously landscaped and appropriately lighted by implementing provisions within the Zoning Ordinance.
- Policy: 1.3.12 Respect the privacy associated with the existing open space.
- Policy: 1.3.13 As part of the Site Plan Review process, compatibility with adjacent land uses shall be demonstrated. Compatibility is defined as consistency with the Future Land Use Map and compliance with Village land development regulations.
- Objective: 1.4.0 Ensure the protection of natural resources and historic resources.*
- Policy: 1.4.1 Utilize orientations to water, to the fullest extent.
- Policy: 1.4.2 By 2019 the Village will, where applicable,– Identify, designate, and protect historic, archeological and cultural resources that may be located within its boundaries by conducting a survey to identify such resources, if any, and adopting appropriate protection mechanisms into the Code of Ordinances.
- Policy: 1.4.3 Implement an ordinance requiring a land development permit prior to commencement of development activities to protect natural resources.
- Policy: 1.4.4 The trimming or removal of mangroves should be consistent with Sections 403.9321-403.9333 of the Florida Statutes and subject to approval of the Village.
- Policy: 1.4.5 The Village shall continue to support the U.S. Department of Interior, Bureau of Land Management/ Palm Beach County Environmental Resource Management Department Land Stewardship Memorandum of Understanding to provide for joint management of the Jupiter Inlet Natural Area. The Village shall support preservation of native plant and animal species on Eco-Site #61, a 52 acre parcel located east of

US-1 and north of County Road 707 (Beach Road), as a component of this effort.

Policy: 1.4.6 The Village will protect mangroves within Tequesta by deferring the regulation of mangroves in proposed development and redevelopment areas to the Florida Department of Environmental Protection for enforcement and protection under Sections 403.9321-403.9333 of the Florida Statutes. This shall be made a part of the Village Site Plan Review Process.

Policy: 1.4.7 The Village shall protect potable water wellfields by allowing only the land uses encompassed within the wellfield drawdown zones of influence shown on the Future Land Use map.

Objective: 1.5.0 *Require, through the land development review process that suitable land is made available for infrastructure facilities necessary to support all proposed development and which are consistent with locally adopted level of service standards.*

Policy: 1.5.1 Implement standards for future land use development in accordance with the density, intensity and use standards outlined in Table FLU-1 of this Element.

Policy: 1.5.2 The Village shall ensure that public facilities and services meet adopted levels of service, and are provided concurrent with development impacts.

Policy: 1.5.3 The Village shall continue to condition the issuance of permits on the availability of facilities and services necessary to serve the proposed development.

Policy: 1.5.4 The approval and authorization of land use development within the Village shall be concurrent with the provision of utility service.

Policy: 1.5.5 Apply the standards and requirements of the adopted hurricane evacuation and civil defense regulations where applicable.

Policy: 1.5.6 Provide for drainage and storm water management, open space, and safe and convenient parking and on site traffic flow by applying the site plan review requirements of the current land development regulations within the Village.

Policy: 1.5.7 Ensure that adjacent land uses are protected by strictly enforcing setback, height, landscaping and signage provisions within the Village land development regulations.



- Policy: 1.5.8 The Building Official is designated as the Floodplain Administrator for the Village of Tequesta. The Floodplain Administrator shall coordinate the impacts of all new development and redevelopment within the coastal zone against existing hurricane evacuation plans.
- Policy: 1.5.9 Electric substations shall be permitted in all Future Land Use Districts except Conservation.
- Policy: 1.5.10 The Village shall implement land development regulations to accommodate and protect existing and future energy efficient electric power generation and transmission systems, including right-of-way protection, allowing substations and transmission lines in Future Land Use and zoning districts, and other mechanisms. The Village prefers and shall encourage the provision of underground utility lines where feasible.
- Policy: 1.5.11 The Village of Tequesta, through the Land Development Regulations, will coordinate current land uses and any future land use changes with the availability of water supplies and water supply facilities.
- Objective: 1.6.0 Coordinate with any appropriate resource planning and management plan prepared pursuant to Chapter 380, Florida Statutes, and approved by the Governor and Cabinet.*
- Policy: 1.6.1 The Village will coordinate its future planning and development with the South Florida Water Management District by requiring the issuance of a Surface Water Management permit, as appropriate, prior to issuing a site plan approval.
- Objective: 1.7.0 Development within Flood Insurance Rate Map zones shall be subject to restrictions implemented through the Village of Tequesta's Flood Damage Prevention Ordinance, flood resistant construction requirements of the Florida Building Code, land development regulations and other provisions of the Code of Ordinances.*
- Policy: 1.7.1 The Village should keep abreast of federal requirements to assure resident's eligibility for flood insurance in the Federal Emergency Management Agency's (FEMA's) National Flood Insurance Program (NFIP).
- Policy: 1.7.2 The Village Floodplain Administrator shall review all development applications and plans in flood hazard areas to comply with the requirements of the Village of Tequesta's Flood Damage Prevention Ordinance and the flood resistant construction requirements of the Florida Building Code

- Policy: 1.7.3 The Village shall continue to operate within FEMA's NFIP Rating System (CRS) and continue to work toward maintaining and improving its CRS status.
- Policy: 1.7.4 A minimum finish first floor elevation above mean sea level (MSL) for all new construction, additions and substantial sea level, or 18 inches above the crown of any road, street, cul-de-sac or highway, or meet the requirements of the Code of Ordinances pertaining to flood hazard areas, whichever is most stringent. (Ord. 22-11)
- Objective: 1.8.0 All proposed new development and redevelopment within the special flood hazard areas shall be subject to site plan review. Delineation of flood hazard areas, floodway boundaries and flood zones, and design flood elevations, shall be shown on preliminary and final plats.*
- Policy: 1.8.1 The Village Floodplain Administrator shall examine the latest land use control criteria relating to flood zone development for inclusion in site plan review process to ensure such development proposals are consistent with the need to minimize flood damage and be reasonably safe from flooding.
- Policy: 1.8.2 The Village should to discourage high intensity land uses and public facilities in the Flood Insurance Rate Map zones and the Coastal High Hazard Area.
- Objective: 1.9.0 The Village shall continue to enforce regulations found in the Florida Building Code requiring new construction, additions, renovations, and substantial renovations or substantial repairs in the Flood Insurance Rate Map zones and Coastal High Hazard Area to utilize the latest wind damage and flood prevention techniques.*
- Policy: 1.9.1 The Village shall continue to maintain provisions for the utilization of latest techniques and building standards through the Flood Damage Prevention Ordinances of the Village of Tequesta for all development located in the Flood Insurance Rate Map zones and Coastal High Hazard Area.
- Objective: 1.10.0 Encourage local residents within the hurricane flood areas to utilize and participate in the NFIP.*
- Policy: 1.10.1 All structures in the Flood Insurance Rate Map zone and Coastal High Hazard Area should be protected by the NFIP flood insurance, where possible.
- Policy: 1.10.2 The Village shall continue to support the requirements of the NFIP for community participation.



Objective: 1.11.0 *Implement innovative development and redevelopment concepts such as Planned Unit Development, overlay zoning, transit-oriented development, and mixed-use development through the land development regulations and other appropriate mechanisms in order to reduce automobile dependency and greenhouse gas emissions, increase energy efficiency, reduce sprawl, and promote more efficient development patterns.*

Policy: 1.11.1 The Village shall continue to support beautification efforts and streetscape improvements on commercial corridors by promoting pedestrian and bicycle friendly design.

Policy: 1.11.2 The Village shall promote mixed use development, defined as a mixture of residential and non-residential land uses in a design-unified, pedestrian friendly environment with multi-modal transportation connectivity to other areas, at appropriate locations. A major purpose of mixed-use development shall be to provide opportunities to live, work, shop and recreate in a walkable area, and to reduce automobile dependence and greenhouse gas emissions.

Policy: 1.11.3 The Village shall encourage the implementation of low impact development techniques and green building standards that reduce the negative environmental impacts of development and redevelopment by: locating building sites away from environmentally sensitive areas; promoting the preservation of natural resources; providing for on-site mitigation of impacts (i.e. retention and treatment of stormwater runoff, water reuse, Master Stormwater Management Systems); promoting energy conservation through design, landscaping and building techniques (i.e. solar power, increased tree canopies); promoting water conservation through landscaping and building design; ensuring environmentally friendly building practices (i.e. use of environmentally friendly building materials, recycled materials), and; considering the development of a Green Building Ordinance and a related Green Certification programs for development and redevelopment, including the development of a Neighborhood Development Rating System that integrates the principles of smart growth, urbanism and green building.

Objective 1.12.0 *Special land use policies shall be developed by the Village of Tequesta when necessary to address site specific land development issues.*

Policy: 1.12.1 Areas designated Mixed Use shall provide for single and multi-family residential uses; small scale retail sales and services, business services and professional services primarily designed to serve residential neighborhoods, and; recreation and open space.



Policy: 1.12.2	The Village should pursue all avenues for grants and other assistance in developing its future areas, especially for those planning areas with special needs and concerns.
Policy 1.12.3	Public Educational Facilities of the School District shall be an allowable use within the "Other Public Facilities" land use category on the Future Land Use Map.
Objective 1.13.0	<i>The Village shall continue to review hurricane evacuation and emergency management plans to ensure that they adequately address its evacuation and emergency management needs and are compatible with coastal planning area population densities and regional emergency management.</i>
Policy: 1.13.1	The hurricane evacuation plan for the Village shall consider the densities and intensities prescribed on the Future Land Use Map.
Objective: 1.14.0	<i>The Village, as appropriate and feasible, shall encourage the elimination or reduction of uses that are not consistent with interagency hazard mitigation reports or hazard mitigation goals.</i>
Objective: 1.15.0	<i>The Village should consider annexation of neighboring areas that are consistent with the character of the community, which can be provided facilities and services consistent with the levels of service standards established by the Village, and which discourage urban sprawl.</i>
Policy: 1.15.1	The annexation of future areas into the Village shall discourage the proliferation of urban sprawl consistent with standards contained within Chapter 9J-5.006 (5), Florida Administrative Code (F.A.C.).
Policy: 1.15.2	Annexation of unincorporated enclave areas shall be pursued consistent with Florida Statutes ensuring the provision of Village services.
Policy 1.15.3	In the event of a future annexation that has sufficient land area to site schools or co-locate schools with public facilities such as; parks, libraries and community centers, prior to the amendment to incorporate the area into the Village Comprehensive Plan, the Village shall coordinate with the Palm Beach County School Board to determine the need to site a school in the annexed area.
Objective: 1.16.0	<i>The Village shall protect and support its urban forestry to care and manage its tree population for the purpose of maintaining and enhancing the urban environment and the character of the Village.</i>
Policy: 1.16.1	The Village shall consider its street trees as infrastructure to preserve and protect them as community assets.



- Policy: 1.16.2 The Village shall protect existing trees by creating mitigation provisions in its land development regulations for its residential and commercial land use districts.
- Policy: 1.16.3 The Village shall encourage additional planting of trees to strengthen the character and aesthetic of its residential neighborhoods and commercial areas.
- Policy: 1.16.4 All development and major renovations shall be encouraged to provide shade trees along sidewalks to promote pedestrian activity and create scenic corridors in neighborhoods and commercial districts.
- Policy: 1.16.5 The Village shall consider providing incentives to developers to preserve trees and natural resources and to encourage additional tree plantings and green areas.
- Policy: 1.16.6 The Village shall continue to promote and enhance the Village’s Tree and Landscape Ordinance as a key element in retention and provision of private plant materials to support sustainable development principles of tree preservation and minimize impacts to the existing site resources.

FUTURE LAND USE



DATA & ANALYSIS INTRODUCTION

This document provides background information concerning the location, historical development and socio-economic data of the Village of Tequesta. In addition, this chapter serves as the framework for developing the Village of Tequesta's 2017 Evaluation and Appraisal Review (EAR) based Comprehensive Plan update.

Per Florida Statutes, Chapter 163.3177 *"the comprehensive plan shall provide the principles, guidelines, standards, and strategies for the orderly and balanced future economic, social, physical, environmental, and fiscal development of the area that reflects community commitments to implement the plan and its elements. These principles and strategies shall guide future decisions in a consistent manner and shall contain programs and activities to ensure comprehensive plans are implemented."*

Pursuant to Chapter 163.3191, Florida Statutes (F.S.), local governments are required to evaluate their local comprehensive plan every seven years to determine if plan amendments are necessary since the last update of the Comprehensive Plan, and notify the State Land Planning agency as to its determination. In 2016, the Village of Tequesta determined it necessary to conduct a review and evaluation of its current Comprehensive Plan to reflect changes in state requirements, current Village's conditions, challenges and future community trends.

The vision and guiding principles of the Village of Tequesta Comprehensive Plan embrace the following "sustainable community" concept: *An urban area with a long-term planning and management vision that incorporates a multi-modal transportation network; walkable, mixed use patterns of development; denser development where infrastructure exists; civic spaces and interconnected open spaces for recreation; economic vitality and job choices; choices in housing price and size; a robust educational system; and a unique identity.* As indicated in the adjacent illustration, the Village's sustainable community concept serves as an umbrella under which all the elements of the Comprehensive Plan are developed.



Comprehensive Planning Process – Evaluation and Appraisal Review

The purpose of this EAR is to examine the Comprehensive Plan over the past years since the last update to the Comprehensive Plan, and to assess how well the Plan is serving the Village. This EAR will identify what changes have occurred and propose how the Plan can be modified to accommodate them. Specifically, the Purpose is to:

- Identify major local issues that are important to the Village;
- Assess how the Comprehensive Plan has guided planning, growth and redevelopment since the last EAR-based amendments;
- Identify changes that have occurred in Tequesta and past Village or other governmental actions that have prompted changes in the community;
- Identify and evaluate changing conditions and trends as they relate to the major issues identified;
- Assess both successes and shortcomings of the Plan;
- Identify what changes need to be made to the Plan to reflect current conditions and direction;
- Determine financial feasibility of the Village Comprehensive Plan and determine to what extent adopted Level of Service (LOS) Standards have been met;
- Respond to changes in Florida Statutes and the Florida Administrative Code in regard to growth management and development;
- Respond to changes to the State Comprehensive Plan and the Treasure Coast Regional Planning Council Strategic Regional Policy Plan as it affects Tequesta's Comprehensive Plan;
- Prepare updated population estimates and projections;
- Assess the success or failure of coordinating residential development in Tequesta with school capacities and in the siting of public school facilities; and
- Identify changes to the Plan to effectively manage growth, redevelopment, and anticipated impacts into the future.

The history of the Village's Comprehensive Plan dates back to its original adoption in October 1988, with subsequent revisions adopted in September, 1989, pursuant to the 1985 Local Government Comprehensive Planning and Land Development Regulation Act (Florida Statutes, Chapter 163). Next, the Village prepared and adopted an EAR-based Comprehensive Plan amendment in August, 1996. Ordinance No. 541 (adopted July 22, 1999) amended the Comprehensive Plan by incorporating new, revised and/or updated text, tables, maps, figures, analysis, as well as goals, objectives and policies in various elements of the Plan. Since these major revisions in 1999, the Village adopted a new Public School Facilities element in 2001 with subsequent revisions. Furthermore, various amendments to the Future Land Use element were adopted in 2002, 2004 and 2005.

The last EAR-based update to the Village's Comprehensive Plan was adopted in February 2009, per Ordinance No. 16-08. The existing Village's Comprehensive Plan encompasses the following ten (10) elements:

- Future Land Use
- Transportation
- Housing
- Infrastructure

- Coastal Management
- Conservation
- Recreation and Open Space
- Intergovernmental Coordination
- Capital Improvement
- Public School Facilities (Per F. S. this is an optional element)

Most recently, in 2016, the Village determined it necessary to conduct a review and evaluation of its current Comprehensive Plan. A notification letter was transmitted to the Department of Economic Opportunity (DEO) in January, 2016.

The current proposed amendment to the Comprehensive Plan is based on in depth review of each element including required legislation, demographics data, information that reflects existing Village's conditions, and future community trends. Additionally, the adopted 2009 Evaluation and Appraisal Report, updated census, and planning and policy provisions provided the basis for preparing amendments to the existing Comprehensive Plan. The subject Comprehensive Plan amendment also includes an update of the following map series:

- Future Land Use
- Existing Land Use
- Transportation Map
- Coastal Soil and Conservation
- Soil
- Flood Zone
- Hurricane Surge

One of the proposed changes to the Comprehensive Plan is the removal of the Public School Facilities Element, an optional element per Florida Statutes. There are no existing or planned public school facilities within the Village limits, and the existing and projected population will not have an impact on school attendance. The Village is concurrently requesting to be exempt from joining the Public Schools Interlocal Agreement for Coordinated Planning, pursuant to criteria set forth in Chapter 163.31777(3), F.S. Detailed information on this topic is presented in the Intergovernmental Coordination Element's data and analysis section.

This EAR-based amendment to the Village's Comprehensive Plan is subject to the State Coordinated Review process, pursuant to Section 163.3184(4), F.S. A summary of this process is outlined below:

1. After initial local hearings (Local Planning Agency and Village Council) approving the proposed amendments to the Comprehensive Plan, the Village is required to transmit the complete proposed plan amendment to the State Land Planning Agency.

2. Next, within 60 days of receiving the complete amendment proposal, the State Land Planning Agency issues an Objection, Recommendation, and Comments Report (ORC) to the local government.
3. The Village is required to hold a second public hearing to adopt the amendment to the Comprehensive Plan.
4. The complete adopted Comprehensive Plan amendment must then be submitted back to the State.
5. Finally, within 45 days of receiving the complete adopted plan amendment, the State Land Planning Agency issues a Notice of Intent to find the plan in compliance or not in compliance, which is posted on their website.

As part of the Village's community participation process, a number of workshops were held to discuss the proposed Comprehensive Plan amendments. The Planning & Zoning Board, sitting as the Local Planning Agency (LPA) Board, had a total of two workshops prior to the LPA transmittal hearing. One took place September 21, 2017 and a second was held November 16, 2017. In addition, the Village Council also had two workshops which took place October 30, 2017 and December 4, 2017.

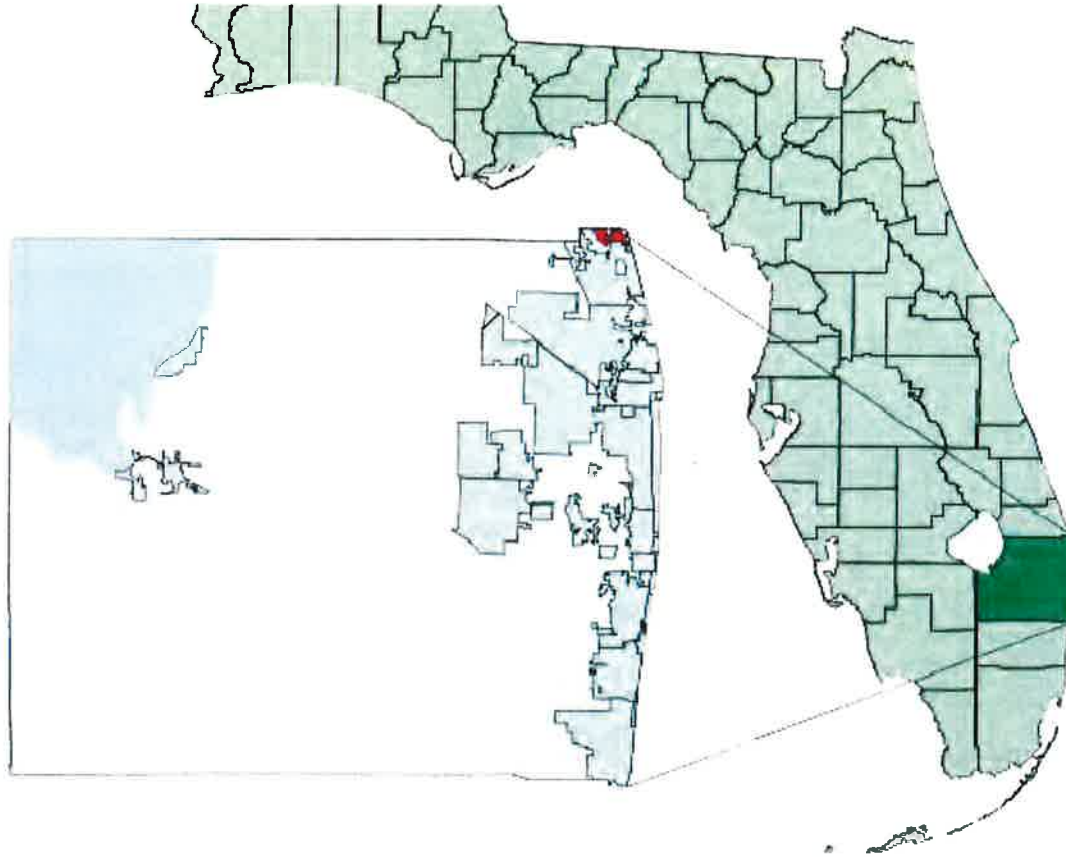
Next, public hearings are required to transmit the proposed amendments to the State Land Planning Agency, including a Local Planning Agency (LPA) hearing followed by a Village Council hearing. The LPA hearing is scheduled for December 21, 2017, followed by the Village Council transmittal hearing on January 11, 2018.

EXISTING CONDITIONS

The Village of Tequesta is located in the northern portion of Palm Beach County along the County's eastern seaboard. Incorporated in 1957, the Village encompasses 2.3 square miles (2014) bounded by: Martin County to the north; the Town of Jupiter, Town of Jupiter Inlet County, unincorporated Palm Beach County, and the Loxahatchee River to the south; the Atlantic Ocean, incorporated Palm Beach County, and the intracoastal waterway to the east, and; the northwest fork of the Loxahatchee River to the west.



Figure 1: Village of Tequesta Location



History and Development

The information contained in this section was taken direction from the History of Tequesta 25 Year Anniversary and History of Tequesta 50 Years Anniversary publications, which can be found on the Document Center accessed through the Village's website.

Our Indian Story

The following excerpts are from an intriguingly thorough study on Indians of the area as they relate to the election of the name Tequesta" for our Village. The material is part of a comprehensive manuscript by Gwyn Corbett. Contrary to popular belief, the Tequesta Indians never lived here permanently. That bit of folklore which led to the selection of the charming name for the Village seems to be historically disproved.

The Tequesta Indians were a southern Florida aboriginal tribe that occupied most of the present Dade County and as far north as Pompano in Broward County. To the west and south their lands merged with the Calusa and boundaries wavered from time to time as that more powerful tribe dominated Tequesta settlements." At various times the Tequesta were also in the Keys. They occupied the Everglades only around the edges. Their preference was the Miami area, with the

largest settlements on Biscayne Bay (Chequesha). They liked to live at the mouth of streams, inlet, and among coastal beaches.

The Jaega and the Jobe (Hobe) are of the same tribe. A small group comprised of three villages, not industrious or powerful, they were spring-offs from the major sophisticated Argonomic Timucuan Indians. They lived as semi-nomads relying entirely on wild foods. The largest settlement in this area was located on the South side of the Jupiter Inlet, where the Dubois homestead is located.

Florida was the home of more than 100,000 Indians when Christopher Columbus first sailed to the new world in 1492. The Indians were descendants of nomadic Indian hunters who had entered the state in search of game at least 10,000 years earlier. But today there are no living descendants of these first Floridians. European diseases, warfare, and enslavement completely destroyed these aboriginal people during the 200 years following the founding of St. Augustine in 1565. By 1720, the northern Florida Indian was non-existent and by 1763 the south Florida Indian had also disappeared. Indians who survived were taken by the Spaniards on ships to Cuba for slavery.

Historic Jupiter-Tequesta

Archeologists tell us that Jupiter on the lower east coast of Florida has been inhabited for nearly 2,500 years. The name Jupiter Inlet has appeared on early Florida maps since 1770. Certainly this place, with its winding rivers and blue-green tides, has a warm, lived-in atmosphere and a feeling of antiquity that has an unfailing attraction for new residents and holds the old ones wedded to its charms.

Since the name is odd and intriguing, many people are interested in its origin, which dates back to the first Spanish explorers who visited the coast of Florida. The Herrera account of Ponce de Leon's first voyage in 1513 seems to indicate he came into Jupiter inlet for wood and water, and to investigate the Indians. Menendez visited the inlet in December and January of 1555-1556. Here, they found a tribe of Jaega Indians who called themselves Jobes, living on a high shell-mound near the inlet. It was custom to name rivers for the nearest Indians, so the river flowing into the Inlet became Jobes Rivers, pronounced by the Spaniards "Hoe-bay". The town 8 miles north of Jupiter is still known as Hobe Sound. When the English arrived in 1763, the Hoe-bay seemed the Spanish version of Jove, which they in turned changed to Jupiter, from which it has never been altered.

An iconic Jupiter landmark is the red brick lighthouse which stands at the junction of the Indian and Loxahatchee Rivers and the Jupiter Inlet channel. The busy traffic of the Inland Waterway passes before it and there is a breathtaking view from a 105-foot tower. The three branches of the Loxahatchee River winding best, the Indian River and the Jupiter Island Resort on the north, the Atlantic Ocean on the east, the inland waterway, Juno and West Palm Beach south, present a panorama encompassing one of the most beautiful parts of Florida.

The lighthouse was built shortly before the Civil War and celebrated the centennial of its first lighting July 10, 1960. It stands on a 61 acre tract, which was part of the 9,088 acres of Fort Jupiter Reservation, set aside after the Seminole Indian War. One of the engagements of the war was fought on the Loxahatchee river on January 24, 1838.

To most pioneers, the 1890's when the Jupiter area was the transportation center of southeast Florida, and Juno was the county seat of Dade County, had all the enchantment of a Rovers and Hammerstein musical. Indian River steamers docked across from the Lighthouse. Another steamer, found too large to navigate the shallows was tied up here and became a floating hotel. The steamers were met by a narrow gauge train known from its stations of Jupiter, Juno, Venus and Mars, as the Celestial Railroad.

Tequesta is Chartered – 1957

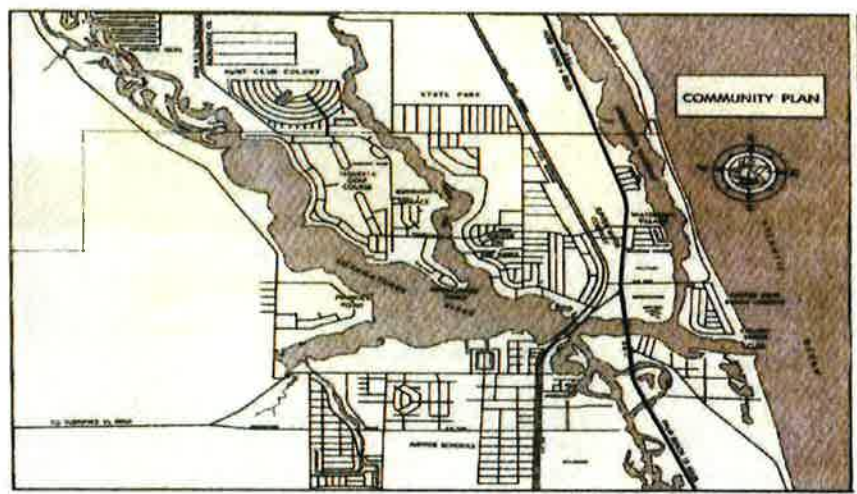
After an early, but abortive, attempt to create an all-encompassing "Village of Jupiter Beach," Charles Martyn and friends moved to incorporate the confines of the present day Tequesta Country Club community. (Jupiter Beach would have included all land north of Jupiter proper to the Martin County line, and from the middle of the Loxahatchee River to the Atlantic Ocean.)

Hence, under "Chapter 57-1915, House Bill No. 1492," The Village of Tequesta was created. It was merely a piece of legislation enacted by the State of Florida, which "became as law without the governor's approval," an inauspicious but legally acceptable beginning.

Immediately after following the July 4, 1957 incorporation date, the Village began getting organized and adopting regulations.

The Sixties

Initially developed as a retirement golf community, the Village eventually expanded beyond this original vision. Though development was slower in the beginning, it increased more rapidly throughout the first decade. The 1960's saw the rapid development of the Country Club Community and surrounding pockets of county land. Pratt & Whitney was in its prime,



Tequesta street map from a 1960's brochure designed to sell property in the newly formed Village.
— Courtesy of Punch Martyn

which drew numerous families to the area for new job opportunities when they relocated to northern Palm Beach County from Connecticut.

By 1967, the Tequesta Country Club was already expanding its facilities to better serve the community. By the end of the decade, the Village had a bowling alley, two movie theaters, and a growing number of families.

The Seventies, Eighties, Nineties, and New Millennium

In the 1970's more merchants opened for business. By this time, Tequesta had a movie theater and a K-Mart in a shopping plaza. There were also two grocery stores, a hardware store, a variety store, and many other shops to accommodate the needs of a growing community.

By the 1980's, the Village of Tequesta continued to attract families to the area and was rapidly evolving as a community. The first "skyscraper" was built on US Highway One, which remains the only building of this sort. County Line Plaza was built, which drew large anchor stores to this location.

The urban fabric of the Village evolved in the Nineties, as new multi-family developments appeared, offering a more affordable living option for the younger generation. Older, outdated shopping centers were replaced with newer plazas and office complexes.

Today

Over the past 58 years, the Village of Tequesta has transformed from a crude, at best, settlement of strong-willed and strong-bodied pioneers to a thriving, modern small Village. Today, Tequesta boasts a population of over 6,500, including seasonal residents, still small in comparison to the neighboring Jupiter, with over 50,000 residents. As of 2014, the median age was 49.3 years, considerably less than when the Village was incorporated, as it was originally developed as a retirement golf community.

Although small in size, the Village of Tequesta continues to stand out in Palm Beach County and around the state. In 2017, the Village was the recipient of three awards related to the Village of Tequesta U.S. Highway 1 (US-1) Master Plan and Complete Streets Project. This \$3.2 million project includes resurfacing and safety improvements along a 1.4 mile stretch of U.S. Highway 1, which is further detailed in the Transportation Element of the Data and Analysis document provides more detail of this project.

During the October 12th, 2017, Village Council meeting, Michael Busha, Executive Director of Treasure Coast Regional Planning Council, presented Mayor Abby Brennan with three awards.

The awards included "Outstanding Infrastructure Award" from the Florida Planning & Zoning Association; Award of Merit: Best Practices Category from the Florida Chapter of the American

Planning Association; and an Innovation Award from the National Association of Development Organization.



The Village is committed to making Tequesta a safe and enjoyable community for both residents and visitors. This important transportation project will transform a major corridor into a safe, accessible, and aesthetically pleasing roadway which will accommodate all users, whether on foot, bike, bus, private vehicle, or other mode of transit.

Land Use

With its extensive waterfront property, high quality residential development, extensive park system, and natural beauty, the Village of Tequesta offers its residents a high quality of life and small-town ambiance in a major metropolitan region. Within the five, ten, and twenty year planning periods, the Village does not project significant new development or redevelopment to occur within its boundaries, or significant population growth.

Redevelopment needs are minimal, and are primarily limited to the remaining handful of vacant parcels and streetscape improvements in the commercial areas along U.S. Highway 1. Because of these factors, no major



issues were identified in the Evaluation and Appraisal Review. The amendments are generally intended to update dates and references, delete obsolete objectives and policies, provide new or amend existing objectives and policies to address new statutory requirements or addressing changing conditions and improve readability and organization.

SOCIO-ECONOMIC ANALYSIS

Population

Table 1, Historic Population Trends, presents historic population trends for the Village of Tequesta. Palm Beach County data is also presented for comparison. Incorporated in 1957, the Village experienced rapid growth during the sixties and seventies. Large industries arrived to this northern area of Palm Beach County during this time, which resulted in the development of multiple subdivisions to accommodate new job opportunities.

Throughout the 1980, 1990s, and 2000s, Village experienced a steady population increase. However, the growth rate was on a steady decline, as the Village became almost fully developed. Multi-family developments during this time mark some of the last developments in the area, as the Village became almost fully built-out. Besides potential development opportunities on the few remaining vacant lots, the population is not expected to see much more significant increases to the population from new development. According to the Bureau of Economic and Business Research (BEBR) of the University of Florida, the population of the Village had increased to 5,665 people by 2015. Additional population analysis and estimates of permanent and seasonal population 2015-2040 are presented at the end of this document.

Table 1. Historic Population Trends

Historic Population Trends						
Year	Village of Tequesta			Palm Beach County		
	Population Estimate	Total Change	Percent Change	Population Estimate	Total Change	Percent Change
1960	199	-	-	228,106	-	-
1970	2,642	2,443	1227.6%	348,993	120,887	53.0%
1980	3,685	1,043	39.5%	576,863	227,870	65.3%
1990	4,499	814	22.1%	863,518	286,655	49.7%
2000	5,273	774	17.2%	1,131,186	267,668	31.0%
2010	5,629	356	6.8%	1,320,241	189,055	16.7%
2014	5,756	68	1.2%	1,397,710	77,469	5.9%
2015	5,665	-	-	1,378,417	-	-

Sources: U.S. Census Bureau; 1980 & 1990 Decennial Census; Bureau of Economic and Business Research (BEBR), University of Florida.

2010 U.S. Census

According to the U.S. 2010 Census, there were an estimated 5,629 people, 3,257 housing units, and 1,567 families residing in 2,490 households in the Village of Tequesta. The racial makeup of the Village was 90.4% White, 0.6% African American, 0.00% Native American, 1.8% Asian, 0.00% Pacific Islander, 0.8% from other races, and 0.9% from two or more races. Hispanics or Latinos of any race were 6.3% of the population.

Of the 2,490 households, 23.7% included children under the age of 18, 51.4% were married couples living together, 7.9% were female householders with no husband present, and 37.1% were non-families. 16.6% of the households had a person living alone who was 65 years of age or older, 2.2% being 85 years and older. The average household size was 2.27 and the average family size was 2.89.

In the Village, the population included 17.6% under the age of 18, 82.4% 18 and over, 5.5% from 15 to 19, 4.1% from 20 to 24, 7.0% from 25 to 34, and 16.6% who were 65 years of age or older. The median age was 49.3 years. The population consisted of 52.7% females and 47.3% males.

Characteristics of the Population

This section examines the socioeconomic characteristics of the population. The following analysis is based on the American Community Survey (ACS) of the U.S. Census Bureau which includes estimates based on a sample of households over a 5-year period. The data provided by the ACS allows an in depth analysis of socioeconomic variables and trends. The following tables reflect the most recent data provided by the ACS and are organized in columns, each representing a 5-year period: the first provides data from 2006-2010, and the second from 2010-2014.

Households

Table 2 presents the number of households and persons per household according to the American Community Survey (ACS) from the U.S. Census Bureau. A household is defined as the person or persons occupying a dwelling unit.

As the average household size decreases, the number of households or required dwelling units increases relative to the population. Due to several factors, average household size is decreasing throughout the United States. These factors include families having fewer children and delaying the birth of children; young adults no longer living with parents but moving out on their own, and older persons living longer independently and not returning to their children in their later years. Combined, these factors have led to a decrease in the average household size.

Conversely, the average household size in the Village of Tequesta as almost remained the same, with a slight increase from 2.27 to 2.28 between 2010 and 2014, as indicated in Table 2. These numbers are slightly lower than the 2014 Palm Beach County average household size of 2.51

persons. In 2014, there were an estimated 2,519 households in the Village, with the majority (62.3%) of those households being families, while 37.8% were non-family households.

Similarly, of Palm Beach County's estimated 529,729 households, 61.9% were family households and 38.1% were non-family households. The Village has a higher percentage of households with one or more people 60 years and over, 44.7%, compared to Palm Beach County, which has 38.6%.

Between 2010 and 2014, the percentage of married-couple families in the Village decreased from 51.4% to 43%, while the number of single-parent households increased during this time.

Table 2. Households by Type

Households by Type	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Households	2,490	(X)	2,519	(X)	529,729	(X)
Family households (families)	1,567	62.9%	1,566	62.3%	327,716	61.9%
With own children under 18 years	590	23.7%	609	24.2%	126,113	23.8%
Married-couple family	1,281	51.4%	1084	43.0%	239,754	45.3%
With own children under 18 years	438	17.6%	367	14.6%	80,469	15.2%
Male householder, no wife present, family	90	3.6%	156	6.2%	23,840	4.5%
With own children under 18 years	50	2.0%	51	2.0%	11,117	2.1%
Female householder, no husband present, family	196	7.9%	326	12.9%	64,122	12.1%
With own children under 18 years	102	4.1%	191	7.6%	34,527	6.5%
Nonfamily households	923	37.1%	953	37.8%	202,013	38.1%
Householder living alone	824	33.1%	877	34.8%	166,476	31.4%
65 years and over	414	16.6%	358	14.2%	83,902	15.8%
Households with one or more people under 18 years	653	26.2%	675	26.8%	139,762	26.4%
Households with one or more people 60 years and over	1,021	41.0%	1126	44.7%	204,327	38.6%
Average Household Size:	2.27	(X)	2.28	(X)	2.51	(X)

Source: U.S. Census Bureau; 2006-2010 5-Year American Community Survey & 2010-2014 5-Year American Community Survey.

Population Age

Table 3 shows the numerical and percentage breakdown of the Village's population by age in 2010 and 2014 according to the American Community Survey (ACS) from the U.S. Census Bureau. The 45-54-year-old age group is the largest in both years (16.7% and 20%). In both 2010 and 2014, the second largest age group was 65-74-year-olds. However, the population in this age

group decreased between 2010 and 2014, from 15.5% to 12.9%. Overall, Tequesta's population 65 and over has decreased, with the most growth seen in the 45 to 59-year age groups.

Palm Beach County's 2014 population trends reflect a growing younger population, with the largest percentage of the population between the ages of 45-54 years (14%); the second largest age group was 35-44 years (12%); and 11.4% was between 25 to 34 years of age.

Table 3. Population Age

Population by Age	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Population	5,642	(X)	5,756	(X)	1,359,074	1,359,074
Male	2,669	47.3%	2,842	49.4%	657,406	48.4%
Female	2,973	52.7%	2,914	50.6%	701,668	51.6%
Under 5 years	106	1.9%	256	4.4%	70,776	5.2%
5 to 9 years	366	6.5%	235	4.1%	74,723	5.5%
10 to 14 years	381	6.8%	365	6.3%	76,842	5.7%
15 to 19 years	310	5.5%	338	5.9%	80,236	5.9%
20 to 24 years	230	4.1%	161	2.8%	78,467	5.8%
25 to 34 years	393	7.0%	375	6.5%	154,437	11.4%
35 to 44 years	642	11.4%	635	11.0%	163,625	12.0%
45 to 54 years	941	16.7%	1,153	20.0%	190,337	14.0%
55 to 59 years	465	8.2%	580	10.1%	89,148	6.6%
60 to 64 years	301	5.3%	373	6.5%	79,773	5.9%
65 to 74 years	872	15.5%	743	12.9%	141,317	10.4%
75 to 84 years	512	9.1%	432	7.5%	105,232	7.7%
85 years and over	123	2.2%	110	1.9%	54,161	4.0%
Median age (years)	49.3	(X)	49.3	(X)	43.9	(X)

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Population Race

Tables 4 and 5 present the racial characteristics of the Village's population according to the American the Community Survey (ACS) from the U.S. Census Bureau. At 92.8%, the largest portion of the population in the Village of Tequesta is White. While the White population decreased between 2010 and 2014, the second largest race population, Hispanic or Latino of any race, increased from 6.3% to 10.2%. The Village's Asian population increased from 1.8% to 4.4% between 2010 and 2014, which is higher than that of Palm Beach County. Palm Beach County

data reflects a slightly different racial breakdown. At the county level, 75.5% percent of the population was white (including persons of any origin) in 2014. Hispanic or Latino of any race accounted for 20% of the population, while Black or African American was 17.7%.

Table 4. Population Race

Population by Race	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Population	5,642	(X)	5,756	(X)	1,359,074	1,359,074
White	5,412	95.9%	5,343	92.8%	1,025,542	75.5%
Black or African American	35	0.6%	92	1.6%	241,136	17.7%
American Indian and Alaska Native	0	0.0%	0	0.0%	2,506	0.2%
Asian	101	1.8%	252	4.4%	33,688	2.5%
Native Hawaiian and Other Pacific Islander	0	0.0%	0	0.0%	702	0.1%
Some other race	43	0.8%	0	0.0%	28,167	2.1%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Table 5. Population Origin and Race

Population by Origin & Race	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Population	5,642	-	5,756	-	1,359,074	1,359,074
White alone	5,100	90.4%	4,764	82.8%	793,341	58.4%
Black or African American alone	35	0.6%	92	1.6%	234,736	17.3%
Hispanic or Latino (of any race)	355	6.3%	588	10.2%	271,524	20.0%
American Indian and Alaska Native alone	0	0.0%	0	0.0%	1,543	0.1%
Native Hawaiian and Other Pacific Islander alone	0	0.0%	0	0.0%	608	0.0%
Asian alone	101	1.8%	252	4.4%	33,506	2.5%
Some other race alone	0	0.0%	0	0.0%	5,048	0.4%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Education

Table 6 indicates the education attainment level of the Village's population according to the American Community Survey (ACS) from the U.S. Census Bureau. Achievement levels are broken down into different categories. The college level groups are further broken down to show those that had some college (no degree), an associate's degree, a bachelor's degree, and a graduate or professional degree. Achievement levels recorded are the highest level (years completed) reached by an individual.

According to Table 6, 93.8% of the population had a high school diploma or higher educational level in the 2006-2010 period. The Village of Tequesta experienced a small increase to 94.4 % in the period 2010-2014. That figure is just slightly higher than the 87.7% of the population in Palm Beach County who had a high school diploma or higher education level. The number of individuals with a graduate or professional degree increased from 11.8% in 2010 to 15.8 % in 2014 in the Village, compared to 12.3% in 2014 for Palm Beach County.

Table 6. Educational Attainment

Educational Attainment	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Population 25 years and over	4,249	(X)	4,401	(X)	978,030	(X)
Less than 9th grade	97	2.3%	198	4.5%	57,704	5.9%
9th to 12th grade, no diploma	165	3.9%	48	1.1%	63,572	6.5%
High school graduate (includes equivalency)	1,087	25.6%	1,047	23.8%	256,244	26.2%
Some college, no degree	941	22.1%	665	15.1%	199,518	20.4%
Associate's degree	287	6.8%	462	10.5%	81,177	8.3%
Bachelor's degree	1,169	27.5%	1,285	29.2%	199,518	20.4%
Graduate or professional degree	503	11.8%	695	15.8%	120,298	12.3%
Percent high school graduate or higher	(X)	93.8%	(X)	94.4%	(X)	87.7%
Percent bachelor's degree or higher	(X)	39.4%	(X)	45.0%	(X)	32.8%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Employment

Tables 7 and 8 provide employment and occupation data according to the American Community Survey (ACS) from the U.S. Census Bureau. Between 2010 and 2014, the Village's population that was in labor force increased from 59.8% to 64.8%. Countywide, 60.2% of the population was part

of the labor force in 2014, while 39.8% were not in the labor force. The Village labor force unemployment rate in 2010 was 1.8% which increased to 3.2% in 2014, compared to 6.5% in Palm Beach County.

In 2010, 34.2% of the labor force was engaged in management, business, science, and arts occupations, which increased to 50.1% in 2014. Service occupations increased from 14.5% to 17.1%, while natural resources, construction, and maintenance occupations experienced an increase from 9.9% to 12.5%. Other occupations in the village decreased between 2010 and 2014. Sales and office occupations decreased from 35.4% to 19.2%; Production, transportation, and material moving occupations saw a decline from 6% to 1.1%. In 2014, 35.4% of the labor force in Palm Beach County was engaged in management, business, science, and arts occupations, which was lower than that of the Village. Palm Beach County had a higher percentage of the population engaged in sales and office occupations at 26.4% than the Village, which saw a decrease in this occupation between 2010 and 2014.

Table 7. Employment Status

Employment Status	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Population 16 years and over	4,730	(X)	4,833	(X)	1,120,841	(X)
In labor force	2,828	59.8%	3,134	64.8%	675,048	60.2%
Civilian labor force	2,828	59.8%	3,134	64.8%	674,589	60.2%
Employed	2,745	58.0%	2,980	61.7%	601,783	53.7%
Unemployed	83	1.8%	154	3.2%	72,806	6.5%
Armed Forces	0	0.0%	0	0.0%	459	0.0%
Not in labor force	1,902	40.2%	1,699	35.2%	445,793	39.8%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.



Table 8. Occupation

Occupation	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Civilian employed population 16 years and over	2,745	(X)	2,980	(X)	601,783	(X)
Management, business, science and arts occupations	938	34.2%	1,494	50.1%	212,979	35.4%
Service occupations	398	14.5%	509	17.1%	132,674	22.0%
Sales and Office occupations	971	35.4%	571	19.2%	159,098	26.4%
Natural resources, construction, and maintenance occupations	273	9.9%	373	12.5%	53,981	9.0%
Production, transportation, and material moving occupations	165	6.0%	33	1.1%	43,051	7.2%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.



Table 9 presents top employers in Palm Beach County according to Palm Beach County's 2014 Comprehensive Annual Financial Report.

Table 9. Palm Beach County Principal Employers

Palm Beach County Principal Employers 2014		
Number	Employer	Number of Employees
1	Palm Beach County School Board	21,449
2	Palm Beach County Government	11,626
3	Tenet Healthcare Corp	6,100
4	NextEra Energy (Florida Power & Light)	3,804
5	G4S (Wackenhut Corp)	3,000
6	Florida Atlantic University	2,980
7	Hospital Corporation of America (HCA)	2,714
8	Veterans Health Administration	2,700
9	Bethesda Memorial Hospital	2,643
10	Boca Raton Regional Hospital	2,250

Source: Palm Beach County's 2014 Comprehensive Annual Financial Report.

Income

Table 10 shows income and benefits data according to the American Community Survey (ACS) from the U.S. Census Bureau. The median income per household declined between 2010 and 2014, possibly due to the economic downturn that characterized the great recession years. The median household income in the Village declined between 2010 and 2014, from \$63,800 to \$54,787. However, the mean household income increased from \$82,843 to 87,390 during this time. In Palm Beach County, the 2014 median household income was \$52,878, while the mean household income was \$80,961.

During the 2006-2010 time period, 20.9% of total households in Tequesta earned an income between \$50,000 and \$74,000. However, by 2014, an estimated 18% of the total households earned an income between \$100,000 and \$149,999, which was the highest percentage of all income levels. As for Palm Beach County, the highest percentage of total households, 17.3%, earned \$50,000 to \$74,999, while 12.5% of total households earned between \$100,000 and \$149,999, in 2014.

Between 2006 and 2010, 6.2% of the population of the Village earned more than \$200,000, which increased to 8.1% during the 2010-2014 period. This percentage is higher than the 6.4% earning more than \$200,000 in Palm Beach County during the same period. Overall, the Village of Tequesta household income was higher than that of Palm Beach County between 2010 and 2014.

Table 10. Income and Benefit

Income & Benefit	Village of Tequesta				Palm Beach County	
	2010 (2006-2010)		2014 (2010-2014)		2014 (2010-2014)	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Households	2,490	(X)	2,519	(X)	529,729	(X)
Less than \$10,000	106	4.3%	73	2.9%	34,021	6.4%
\$10,000 to \$14,999	131	5.3%	131	5.2%	27,469	5.2%
\$15,000 to \$24,999	183	7.3%	234	9.3%	58,443	11.0%
\$25,000 to \$34,999	191	7.7%	268	10.6%	56,755	10.7%
\$35,000 to \$49,999	346	13.9%	395	15.7%	74,889	14.1%
\$50,000 to \$74,999	521	20.9%	358	14.2%	91,492	17.3%
\$75,000 to \$99,999	323	13.0%	292	11.6%	60,504	11.4%
\$100,000 to \$149,999	412	16.5%	454	18.0%	66,224	12.5%
\$150,000 to \$199,999	122	4.9%	109	4.3%	26,179	4.9%
\$200,000 or more	155	6.2%	205	8.1%	33,753	6.4%
Median household income (dollars)	63,800	(X)	54,787	(X)	52,878	(X)
Mean household income (dollars)	82,843	(X)	87,390	(X)	80,961	(X)

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Poverty Level

Table 11 presents the percentage of families and people whose income in the past calendar year was below the poverty level. Federal poverty levels are used to determine eligibility for certain programs and benefits. Poverty level is a measure of income level issued annually by the Department of Health and Human Services. The economic downturn and high level of unemployment during the great recession impacted income and raised the number of families and people under poverty level in Tequesta as experienced elsewhere.

Overall, the Village of Tequesta has lower poverty levels than Palm Beach County. However, the number of families and people below the poverty level in the Village increased from 2010 to 2014. All families below the poverty level increased from 1.6% to 3.9%; and all people from 3.4% to 5.4%. As for Palm Beach County, 10.5% of all families, and 14.6% of all people were below the poverty level in 2014. On the contrary, the number of families in the Village with female householders (no husband present) decreased from 10.7% to 5.8% during this time period, whereas 26.2% of these families were below the poverty level in Palm Beach County. In both the Village and the county, more families with female householders (no husband present) were under the poverty level in comparison with married couple families.

Table 11. Poverty Level

Poverty Level	Village of Tequesta		Palm Beach County
	2010 (2006-2010)	2014 (2010-2014)	2014 (2010-2014)
	Percent	Percent	Percent
<i>All families</i>	1.6%	3.9%	10.5%
With related children under 18 years	3.8%	5.5%	17.8%
With related children under 5 years only	0.0%	0.0%	17.2%
Married couple families	0.0%	3.9%	5.8%
With related children under 18 years	0.0%	4.8%	9.2%
With related children under 5 years only	0.0%	0.0%	6.6%
Families with female householder, no husband present	10.7%	5.8%	26.2%
With related children under 18 years	18.6%	8.0%	34.7%
With related children under 5 years only	0.0%	0.0%	38.1%
<i>All People</i>	3.4%	5.4%	14.6%
Under 18 years	3.1%	6.0%	22.3%
Related children under 18 years	3.1%	6.0%	22.0%
Related children under 5 years	0.0%	0.0%	25.3%
Related children 5 to 17 years	3.4%	7.8%	20.8%
18 years and over	3.5%	5.3%	12.6%
18 to 64 years	2.9%	5.6%	14.1%
65 years and over	4.8%	4.6%	8.8%
<i>People in families</i>	1.3%	4.2%	12.5%
Unrelated individuals 15 years and over	12.1%	10.0%	21.8%

Source: U.S. Census Bureau; 2006-2010 American Community Survey & 2010-2014 5-Year American Community Survey.

Population Projections

As indicated in Table 12, the most recent estimate of the permanent population for the Village is 6,119 residents for 2040, according to the Shimberg Center for Housing Studies Clearing, which are based on University of Florida's Bureau of Economic and Business Research (BEBR) and the center's housing data. Seasonal population presented an actual increase of 325 people between the last decennial censuses. That represented a 54% increase in seasonal residents. That growth coincided with a peak in Condo construction where the majority of seasonal residents own or rent property today. Since then, the Village has essentially reached a built-out status. It has been assumed that seasonal population may continue to grow but at the same pace of the permanent population. Table 12 presents a total population, including seasonal, of 7,128 people for the year 2040.

Therefore, both permanent and seasonal population are expected to remain stable over the next 20 years given the built-out status mentioned above, unless the Village chooses to pursue a new major annexation program, which has been rejected in the recent past by residents of those areas, or attract considerable higher density redevelopment in the future. Although the University of Florida's BEBR is projecting a 358,117 increase in the number of permanent residents living in Palm Beach County between 2015 and 2035, it is unlikely that the Village's growth will be impacted without some significant change in anticipated conditions.

In conclusion, Table 12 presents actual population growth increase between the last two decennial censuses. Since then, the Village has experienced very little population growth, which is estimated to continue, as shown in the projected population 2015-2040. A factor that has certainly contributed to the Village's slowing growth rate include the lack of available land for new development, since the Village is basically built out. Future estimated population growth could be accommodated in the remaining vacant land, potential annexation of unincorporated enclaves scattered throughout the Village or potential higher density redevelopment of existing areas.

While the Village of Tequesta's growth rate has decreased overtime, Palm Beach County's population is projected to increase steadily over the next 20 years, reaching an estimated 1,736,534 people by 2035, as indicated in Table 13.

Table 12. Projected Total Population, Village of Tequesta, 2015-2040

Year	2000	2010	2015	2020	2025	2030	2035	2040
Permanent	5273	5629	5665	5808	5916	5977	6063	6119
Seasonal	603	928	934	958	976	986	1000	1009
TOTAL:	5876	6557	6599	6766	6892	6963	7063	7128

Sources: University of Florida Bureau of Economic and Business Research, Population Projections; U.S. Census Bureau, 2000 and 2010 Decennial Census; Palm Beach County Planning Zoning & Building Department: 2016 County Profile-2010 Seasonal figure for Tequesta; Shimberg 2010-40 projections, Accessed Nov 28, 2017.

Table 13. Projected Total Population, Palm Beach County, 2015-2035

Year	2000	2010	2015	2020	2030	2035
Palm Beach County	1,131,186	1,320,241	1,378,417	1,463,928	1,615,147	1,736,534

Sources: University of Florida Bureau of Economic and Business Research, Population Projections; U.S. Census Bureau, 2000 and 2010 Decennial Census.

REFERENCES AND SOURCES

History of Tequesta 25 Year Anniversary (Village of Tequesta Document Center)
History of Tequesta 50 Years Anniversary (Village of Tequesta Document Center)
University of Florida Bureau of Economic and Business Research.
U.S. Census Bureau, 1980 & 1990 Decennial Census
U.S. Census Bureau, 2006-2010 American Community Survey; 2010-2014 5-Year American Community Survey.

DATA & ANALYSIS
CHAPTER 1: FUTURE LAND USE ELEMENT

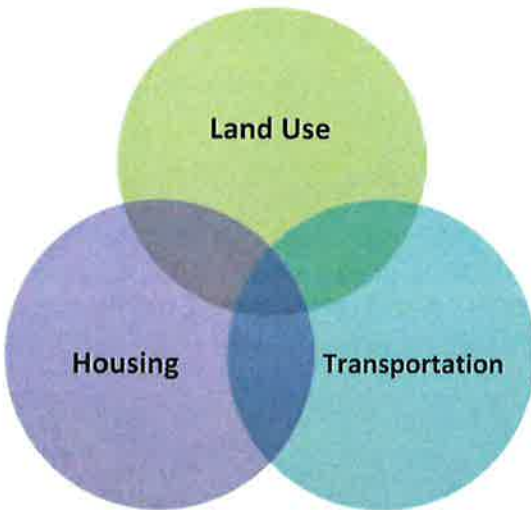
INTRODUCTION

This chapter presents an inventory and analysis of background data for preparation of the Land Use Element and Future Land Use Map for the Village of Tequesta pursuant to Section 163.3177(6), Florida Statutes. This Data and Analysis document provides the framework for evaluation of key land use issues and preparation of the Future Land Use Map and goals, objectives, and policies presented in the Policy Document.

The purpose of the Land Use Element of the Comprehensive Plan is to influence existing and future land use patterns by designating appropriate locations for future land uses and establishing a policy framework for managing future growth and development to accommodate anticipated employment and population. These policies focus not only on the location of land uses and the density and intensity of these uses, but also on the form and character of the physical development.

Long range sustainable community planning recognizes the interrelationship between land use, housing and transportation (Figure 1-1). The Future Land Use Element provides the policy mechanism to coordinate these three factors to provide a mix of housing and land uses that will satisfy demand and support a balanced, inclusive community.

Figure 1-1. Relationship between Land Use, Housing and Transportation



The Land Use Element is the critical policy mechanism for integrating the policies and strategies of the other elements of the Comprehensive Plan into a coherent and consistent set of land use goals, objectives, and policies. As such, the element must be consistent with all other elements of the Comprehensive Plan and incorporate the concepts and principles of these elements in its land use policies in a manner that minimizes impacts on natural and historic resources, provides and maintains public services and facilities at adequate levels of service, enhances community character and the quality of life of the Village's residents, businesses, and visitors.

The Future Land Use Map and policies of this element provide the policy framework and rationale basis for Village's land development regulations and programs to implement the Comprehensive Plan. Pursuant to Chapter 163, Florida Statutes (F.S.), all land development regulations and development permitting actions are required to be consistent with the Future Land Use Element and other elements of the Comprehensive Plan.

EXISTING CONDITIONS

Existing Land Uses

The current land uses within the Village of Tequesta reflect its historical development pattern. The total acreage for existing land uses, including vacant lands and rights-of-way is 1,172.26 acres. Not included in this total are the 296.19 acres within the Village limits that are occupied by open water. Therefore, the Village limits cover approximately 2.29 square miles. The distribution of existing land uses by acreage are tabulated in Table 1-1 below.

Table 1-1. Existing Land Use 2016

Designation	Square feet	Acres	Percentage
Commercial	3,019,685	69.32	4.70%
Conservation	351,962	8.08	0.60%
Low Density	19,367,578	444.62	30.30%
Medium Density	3,090,493	70.95	4.80%
Mixed Use	3,937,361	90.39	6.20%
Other Public Facilities	613,396	14.08	1.00%
Public Buildings and Grounds	898,132	20.62	1.40%
Recreation and Open Space	9,529,489	218.77	14.90%
Roads	9,134,927	209.71	14.30%
Water	12,902,044	296.19	20.20%
Vacant	1,120,494	25.72	1.80%
Total	63,965,561	1,468.45	100.00%

Sources: Community Development Department, Existing Land Use Map, Village of Tequesta, 2016.

Residential

Residential land use constitutes 35.10% percent of the land acreage within the corporate limits and is the major land use within the village. The residential land use category contains single-

family, duplex, and multi-family units. This category does not include motels, hotels, or mixed residential-commercial projects.

Of the total land in residential use, 30.30 percent is in single family use. The maximum net density (including right-of-way) for single-family use 5.4 units per acre.

Multi-family uses, which include duplex and multiple dwellings on a single parcel/lot, account for 4.80 percent of total residential acreage. The maximum net density for multi-family uses is 12 units per acre. Not included in this category are residential units mixed with commercial uses, but included are condominium projects that include dwelling units occupied for seasonal and transient residential uses.

Commercial

Commercial uses account for 4.70 percent of total existing land use acreage. Major commercial uses are located mainly in linear strips along U.S. Highway 1 (US-1), the major commercial corridor in Tequesta. Minor commercial uses are located along Old Dixie Highway, Tequesta Drive and Cypress Drive.

Commercial uses include retail/personal sales and services, finance, insurance, real estate, professional and legal administrative offices.

Transportation

Transportation accounts for 14.30 percent of total existing land use. The vast majority of this acreage is occupied by local roads.

Mixed Use

Mixed residential and commercial uses constitute 6.20 percent of total land use acreage in the Village. The Mixed Use area is located east of Old Dixie Highway, west of U.S. Highway 1, largely between Bridge Road and Village Boulevard. There are 90.39 Mixed Use acres just north of Village Boulevard boarding Old Dixie Highway. The Mixed Use category includes a mix of single and multi-family residential uses; small scale retail sales and services, business services and professional services primarily designed to serve residential use buildings; and recreation and open space

Public Buildings and Grounds

This land use category includes land and structures owned, leased or operated by a government entity, and/or privately-owned but used for a public purpose. 2.62 acres; 1.40 percent.

Other Public Facilities

Public or private facilities or institutions such as churches, schools, fraternal organizations, and nursing homes. 14.08 acres; 1.00 percent

Recreation and Open Space

Recreation and open space areas, which account for 14.90 percent of total land use in the Village, include active or passive recreational use. Public parks and facilities include Tequesta Park, Constitution Park, the Skate Park, and Tequesta Recreation Center. A private golf club, The Tequesta Country Club Golf Course, accounts for a large portion (125.36 acres) of the total 218.77 acres in this category. At 50.89 acres, the U.S. Government Lighthouse Reservation is another large tract in the Recreation and Open Space category.

Conservation

Conservation lands (8.08 acres) account for 0.60 percent of total existing land use and includes land used for the conservation and preservation of natural resource.

Vacant

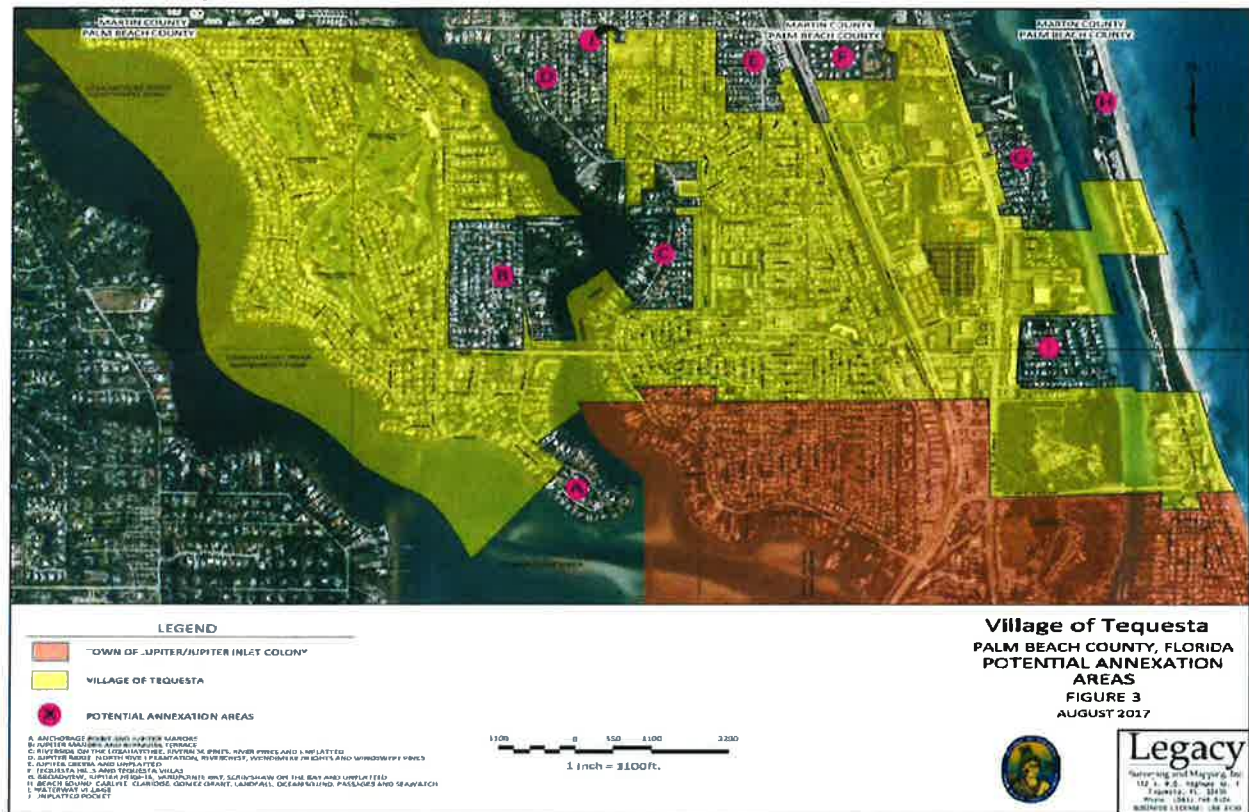
Those lands that are not currently developed are classified as vacant land. Approximately 8.10 percent of land use acreage in the Village is in this category.

Change in Land Area

In 2011, the Village of Tequesta developed an Annexation Strategic Plan Analysis (ASPA) to guide the process of annexing surrounding properties, both commercial and residential. The ASPA provided the Village with critical information for making decisions regarding the future growth of the Village of Tequesta. The final purpose of the annexation analysis was to evaluate the costs and benefits of annexing potential adjoining areas, and to define a suitable implementation strategy to annex specific areas. The ASPA identified ten (10) unincorporated surrounding pocket areas as presented in Figure 1-2.

On August 27, 2013 there was an annexation special election for residents located in Area C and Sandpointe Bay Condominium; neither initiative was successful since the majority of residents voted not to be annexed into Tequesta. Prior to the referendum, the Village conducted extensive community outreach efforts that consisted of a series of informational workshops where residents had the opportunity to ask Village staff and elected officials questions about services, applicable taxes and fees related to joining the Village.

Figure 1-2. Map of Potential Annexation Areas



This effort was supported by communication through direct letters, an annexation brochure, web site, social media, and articles in newsletters (hard copy and e-mail based).



Throughout this proactive approach, the Village hosted the following Informational Annexation Workshops with residents of Area C in 2012 and Sandpointe Bay in 2013:

- Riverside Pines (Colette Drive and Nicole Circle) – August 13, 2012
- River Pines and Unplatted Area – October 22, 2012

- Riverside on the Loxahatchee – October 24, 2012
- Sandpointe Bay – April 4, 2013

Table 1-2 presents annexation trends from 1996 to 2016. The present analysis focuses on annexation initiatives conducted since 2007. Four (4) annexation actions were initiated between 2007 and 2016 comprising 5.5642 acres.

Table 1-2. Annexation Trends 2007 to 2016

Ordinance No./ Adoption Date	Brief Description	Size (Acres)
<i>1996 to 2006</i>		
Ordinance No. 546 September 21, 1999	Parcel generally known as the Zainos property located at 801 U.S. Hwy. 1, just south of Canal Court	0.660
Ordinance No. 561 September 27, 2001	Parcel generally known as the Rood property located at 4546 County Line Road.	15.230
Ordinance No. 566 January 10, 2002	Parcel generally known as the Morgan property located at 19654 N. Riverside Drive	0.290
Ordinance No. 567 January 10, 2002	Parcel generally known as the Glendenning property located on the north side of Riverside Drive just south of the Rood property.	0.340
Ordinance No. 586 April 8, 2004	Parcel generally known as Turtle Beach located east of U.S. Hwy. 1 between Palm Court N. and Harbor Road.	0.495
Ordinance No. 592 December 9, 2004	Parcels located east of U.S. Hwy. 1 just north of Canal Court	1.330
Ordinance No. 611-06/07 January 11, 2007	One (1) parcel on US Highway 1 (American Legion)	1.58
Resolution No. 13-12 (Enclave Interlocal Agreement) June 14, 2012	Four (4) Parcels on County Line Road (Single Homes and Lift Station Site)	1.463
Ordinance No. 15-12 October 11, 2012	Three (3) Parcels on US Highway 1 (Budget Rental and Judy's Café)	0.7278
Ordinance 19-14 November 13, 2014	Three (3) Parcels on County Line Road (Bella Villagio)	1.7934
Total		23.91

The American Legion parcel (1.58 acres) located at 725 US Highway One was annexed into Tequesta on January 11, 2007. A "Commercial" land use designation was officially applied to this site in 2009. This action constituted a small-scale amendment to the Future Land Use element and Map (Ordinance 4-09).

On June 14, 2012, five (5) parcels located on County Line Road were annexed into Tequesta; four of them were single family homes and one was a lift station owned by the Loxahatchee River District.

This annexation was conducted as an Enclave Interlocal Agreement between Palm Beach County and the Village. The parcel located at 4518 County Line Road returned to Palm Beach County in 2013. A “Low Density Residential” land use designation was applied to 4412 and 4480 County Line Road; a “Medium Density Residential” land use designation was applied to the 4534 and 4518 County Line Road parcels. These actions constituted a small-scale amendment to the Future Land Use element and Map (Ordinances 10-12 and 12-12 respectively).

On October 11, 2012, three (3) parcels located on US Highway One were annexed into Tequesta: Budget Rental and Judy’s Café. This annexation was through a voluntary/involuntary process where more than 50% of land owners agreed to annexation. A “Commercial” land use designation was officially applied to this site in 2009. This action also constituted a small-scale amendment to the Future Land Use element and Map, (Ordinance 12-12).

The most recent annexation was a 1.7934 acre area of land located on County Line Road. It was a voluntary annexation to develop a condominium initiative called “Bella Villagio.” This area was annexed in November 13, 2014. The Village classified this property “Medium Density Residential” through the small-scale amendment process (Ordinance 21-14).

The Village of Tequesta has extensively analyzed a number of unincorporated pocket and enclave areas lying adjacent to its corporate limits for potential annexation into the Village. Consultants and staff have worked cooperatively with Palm Beach County in these efforts. Cost/benefit analyses have been prepared for each of the potential annexation areas for presentation to the respective neighborhood groups and for Village Council consideration. Efforts toward annexation of these identified areas have not come to fruition as of this date.



The Village has adopted Level of Service (LOS) Standards in its Comprehensive Plan and land development regulations which are utilized in the site plan review and building processes to ensure that adequate facilities and services will accommodate proposed growth and development. The annexation of enclave and adjacent areas would not only “square off” the Village corporate boundaries, but allow for more efficient provision of various urban facilities and services.

The Village has developed and coordinated relationships with Palm Beach County, neighboring municipalities, Treasure Coast Regional Planning Council (TCRPC), South Florida Water Management District (SFWMD), Loxahatchee River District (LRD), and a other entities/jurisdictions in reviewing land use and annexation issues of common interest. These agencies and entities continue to be included in the land use decision-making process, where applicable, through the Village's development review processes.

Vacant Land Available for Future Development

There are only 25.723 acres currently Vacant and available for future development within the existing corporate limits of Tequesta. This compares to 84.5 acres reported as Vacant in 1996. Vacant lands are defined as those lands that are currently undeveloped (including parcels with development order approval, but have yet to commence development) and which do not carry any other land use designation (such as Conservation use) as of the December 2016 Existing Land Use survey conducted for this EAR.

Vacant lands currently represent 1.8% of the total land area in Tequesta. This is down from the nearly 6% reported in 1996. This decrease in vacant lands is explained by increased development in the Village and also by changes in the way land uses are reported in the current December 2016 existing land use analysis. For example, some lands located between Tequesta Drive and Bridge Road, and between Old Dixie Highway and U.S. Highway 1, while reported as Commercial use in 1996 are now classified as Vacant. Likewise, some lands fronting U.S. Highway 1 at the north end of the Village (e.g. old car dealership) were also reported as Commercial in 1996, but this use has since been discontinued and these lands are currently designated as Vacant.

Infill development of existing residential and commercial areas and extensive development of the Mixed Use designated areas are responsible for the substantial decrease in vacant lands reported in Tequesta today. For example, the residential area located along Cypress Drive North has developed substantially since the 1996 existing land use analysis was conducted.

There has been in-fill of single family lots in established residential areas such as the Country Club, Tequesta Pines and the older established neighborhoods in Tequesta. There has been some limited, new Commercial development such as the Palm Court office complex located at the northeast corner of Cypress Drive North and Tequesta Drive; the gas station/convenience store at County Line Road and U.S. Highway 1; and the Commercial office portion of the Casa Del Sol mixed use development located south and west of the gas station/convenience store facility just cited.

The remaining new Residential and Commercial development has occurred in the annexation areas discussed above. The most significant development of previously vacant properties, however, has been in the Mixed Use designated area in the Village. Since 1996, the following major residential developments have been located within the Mixed Use area:

- Tequesta Oaks (158 units);

- Sterling House (84 units);
- Tequesta Terrace (100 beds),
- Tequesta Trace (134 units);
- Lighthouse Cove (192 units);
- Tequesta Cay (58 units);
- The Crossings site was redeveloped as a Rehabilitation Facility “Futures of Palm Beach” (75 units) in 2011.

Most recently, on January 12, 2017, Village Council approved a 96-unit adult congregate living facility to be located on a vacant 8 acres site on County Line Road (Key Estates Senior Housing Living), which is pictured here.



TRENDS AND CHALLENGES

Changes in Land Use

Residential Land Use

There has been a very modest change in total land area of the Village of Tequesta. Today, there are approximately 1,468.44 acres within the corporate limits of Tequesta including a 296.19 acres of water of bodies. As reported above annexations have added just over twenty (23) acres to the municipal limits.

The largest use of land in the Village continues to be Residential. Residential use increased from approximately 473 acres in 1996 to 515.56 acres in December 2016. This represents an 8.9% increase in Residential land use over that time period. In 2016, Residential areas represent 35.10% the total land area of the Village.

Most Residential development continues to be single family, low density development (maximum 5.4 dwelling units/acre). About 444.62 acres of the 515.56 acres of Residential use is single family, low density development. The amount of land occupied by medium density Residential development (maximum 12 dwelling units/acre) has not changed significantly. Approximately seventy one-71 acres are currently used for medium density Residential, as compared to 65.4 acres in 1996.

A substantial amount of Mixed Use development in Tequesta has been Residential. There are over ninety (90.39) Mixed Use acres in the existing land use analysis reported in Table 2-1. Much of the Mixed Use acreage is developed primarily and exclusively for residential purposes. The residential density in the Mixed Use category allows up to a maximum of eighteen (18) dwelling units/acre thus representing the highest-density residential areas in the Village.

All development in the Village continues to be consistent with the Future Land Use Map and the Official Zoning Map of the Village. Commercial and high density residential are prohibited from locating in low density residential areas. This trend and direction should continue in the future.



Commercial Land Use

The amount of Commercial acreage in Tequesta has actually decreased since 1996. The current existing land use analysis as indicated in Table 2-1 reports 69.32 acres of Commercial development in Tequesta, which is down from the 97.5 acres reported in the 1996. The reason for this difference is easily explained. The area (approximately 15 acres) occupied by the Tequesta Oaks residential area today was an older major commercial shopping center. Likewise, there were nearly five (5) acres reported in the downtown area that no longer exists, while a car dealership on U.S. Highway 1 has been discontinued and closed, as well. Only 4.7 % the total land area in Tequesta is occupied by Commercial development.



Recreation Land Use

The amount of Recreation and Open Space acreage has increased since the 1996 land use analysis. The increase comprises certain private open space areas (1.26 acres); a Village-maintained detention area on Cypress Drive North (approximately 0.4 acres); an open area on Point Drive; nearly eighteen (18) acres within the FEC Railroad right-of-way; and the addition of the green open space in Seabrook Road (Remembrance Park) in 2012. The existing total Recreation and Open Space is 218.76 acres representing 14.9 percent of the total land area (December 2016).

The major recreational areas in Tequesta are: the Tequesta Country Club, a 120 acre private golf course; Coral Cove park, a County-owned and maintained beachfront community park on the Atlantic Ocean; Village Green Park, a neighborhood park owned by the Village and located at the Village Hall complex on Tequesta Drive; Constitution Park, another neighborhood park; and, nearly fifty (50) acres of State-owned land located north of CR 707 and east of U.S. Highway 1.



Conservation Land Use

The amount of land identified as Conservation use has not changed since the last update. There are 8.08 acres of Conservation use designated in the Village which represents only 0.6 % of the total land area within the Village (Table 2-2). Conservation uses consist of one upland areas which are identified as areas of environmental concern, and the beaches and shoreline areas throughout the Village. Conservation is discussed in greater detail under in the Conservation element.

Public Buildings and Grounds

The amount of land used for Public Buildings and Grounds has changed minimally since the last update. The change in area is the result of a land use designation change to the Palm Beach County Fire Rescue site which was previously designated as low density residential, and the Village Recreation Center that was previously designated in the Other Public Facilities category. Otherwise, the land uses for Public Buildings and Grounds has remained relatively the same. There are approximately twenty one (21) acres in the Village used for these purposes, representing 1.4% of the total area.

Other major Public Buildings and Grounds uses include the Tequesta Police and Fire Department facility, the U.S. Post Office, and the Library.

Other Public Facilities

The amount of land areas utilized for Other Public Facilities has not changed. This land use classification includes uses for churches, clubs, fraternal organizations, educational uses and other similar uses. There are approximately fourteen acres (14.08) in the Village used for these purposes, representing 1 % of the total area.

Roads

Transportation use has increased slightly with the annexation and development of new areas. The acreage dedicated to public rights-of-way for roads and streets accounts for the slight increase in acreage for transportation purposes. Approximately 209.71 acres, or 14.3% of the total area of the Village are dedicated to streets and roadways (Table 2-2).

Water Bodies

There are nearly 300 acres of Water Bodies located within the corporate limits of Tequesta. Water Bodies represent over 20% of the developed and total area of the Village. The North and Northwest Forks of the Loxahatchee River, a portion of the Intracoastal Waterway (ICWW); and canals serving residential areas lie within the boundaries of Tequesta. This has not changed since 1996 land use inventory.

Vacant Land

The amount of vacant land in the Village has decreased significantly. There are only 25.723 acres currently Vacant and available for future development within the existing corporate limits of Tequesta. This compares to 84.5 acres reported as Vacant in 1996. It is expected that the remaining vacant lands will be entirely build-out within the long range planning period of the Comprehensive Plan update. On January 12, 2017, Village Council approved a 96-unit adult congregate living facility to be located on a vacant 8-acre site on County Line Road (Key Estates

Senior Housing Living). As of November 2017, the parcel is still vacant and the applicant is considering a time extension. As a result, the property was considered as vacant for this analysis.

There are no agricultural or industrial land uses in Tequesta. These uses are strictly prohibited since neither the Future Land Use Map nor the Village's Official Zoning Ordinance provide for such uses.

There are no public school facilities, recognized historic sites, or areas of critical state concern in the Village of Tequesta. The Village has been found to be "exempt" from State school siting and co-location requirements by the Palm Beach County School District. Even though the School District does not have any plans for locating any public school facilities within the corporate limits of Tequesta during the short term (5-Year) or long term (10-Year) planning periods of the updated Comprehensive Plan, the Village has adopted Objective 2.1.0 and Policies 2.1.1 and 2.1.2 in the Future Land Use element in the unlikely event a school facility may be deemed necessary in future planning periods or as a result of future annexation.

Future Land Use Projections

Table 1-3 and Figure 1-3 present Future Land Use designations acreage and percentages. Because there is very little land that is currently Vacant and available for future development within the Village of Tequesta (25.72 acres, or 1.8% of the total land area); future development in Tequesta will be limited. Most future low-density residential development will be in-fill development of individual single-family lots. Likewise, there is an insignificant amount of land available for medium density development. There are less than five (5) acres within the Mixed Use area that has not yet been developed that could potentially be developed at the higher densities allowed in the Mixed Use district. So, little difference is anticipated in the short (5-Year) and long (10-Year) term land use projections for new Residential development.

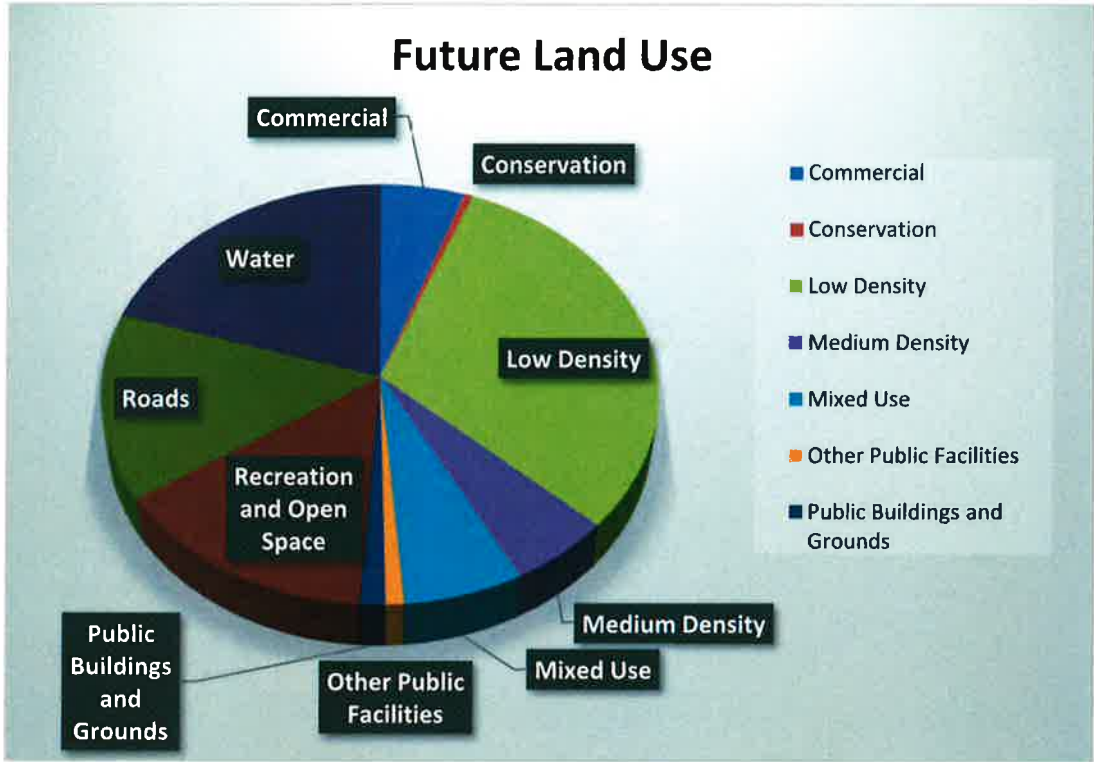
Table 1-3. Future Land Use

Designation	Square Feet	Acres	Percentage
Commercial	3,367,752	77.313	5.30%
Conservation	353,359	8.112	0.60%
Low Density	19,758,505	453.593	30.90%
Medium Density	3,555,040	81.612	5.60%
Mixed Use	4,099,194	94.105	6.40%
Other Public Facilities	620,676	14.249	1.00%
Public Buildings and Grounds	892,083	20.479	1.40%
Recreation and Open Space	9,281,981	213.085	14.50%
Roads	9,134,927	209.709	14.30%
Water	12,902,044	296.190	20.20%
Total	63,965,561	1,468.447	100.00%

There is land available within the commercially zoned areas for some new commercial development in US Highway One (North of County Line Plaza). It is not expected that Recreation

and Open Space (parks, beaches, eco-sites), Conservation, Public Buildings and Grounds, Other Public Facilities (churches, clubs, homes for the aged and infirm) uses will increase in the future within the existing corporate limits. It is not expected that Transportation (roads, streets, railroad rights-of-way) and Water Bodies will change in the near or long term planning periods either. Redevelopment or subdivision of land that would cause a substantial change in land use is not anticipated within the Village.

Figure 1-3- Future Land Use



It is projected that build-out within the existing corporate limits of Tequesta will occur within a 5 to 10-Year planning period of the updated Comprehensive Plan. Based on this analysis, future land use projections as presented in Table 1-3 are reasonably predictable and will be the same for the short-term (5 to 10 years) and long-term (30 years) planning periods of the updated Plan. However, annexation of surrounding pocket areas could impact residential land use designations and acreages. The Future Land Use Map is presented as part of the Map Series.

Infill & Redevelopment

The Village of Tequesta could accommodate infill and redevelopment growth. Commercial and mixed use developments along US Highway One are potential areas to be redeveloped in the future. For example, Tequesta Shoppes was redeveloped in 2013. The initiative improved the aesthetics of the commercial plaza by upgrading building elevations, landscaping, parking resurfacing and signage.

Infill & redevelopment should promote superior projects within the village' urban landscape. Propose buildings are encouraged to be mixed use, energy efficient, appropriately landscaped, and aesthetically pleasing. Limitations upon the land; lot size, parking requirements, height restrictions, etc. should be flexible and not a hindrance in superior design. Infill redevelopment should allow flexible design while maximizing the potential use of a building or site.

The very nature of infill redevelopment promotes higher and best uses while discouraging sprawling development upon green space, suburban, and rural land. Infill redevelopment encourages the following positive planning characteristics:

- Existing infrastructure use
- Conserving natural land instead of sprawl
- Reduced commuting time
- Minimized traffic congestion
- Physical activity and healthy lifestyles
- Increased property values
- Open space preservation
- Vacant land rehabilitation
- Energy conservation
- Public/Private partnerships
- Workforce housing for teachers, police officers, and fire fighters



Infill redevelopment is positive in numerous aspects, however, becomes unachievable due to some of the following:

- Inflexible building and development code regulations
- Neighborhood opposition
- Prolonged permit processes
- Financial challenges
- Acquisition and land assembly

Creative design and the anticipation of healthier lifestyles create superior infill redevelopment projects. The ability to live, work, and play within one's own neighborhood is vital for infill redevelopment's success. The use of energy efficient appliances, environmentally friendly materials, superior architecture, and native landscaping provide the foundation for infill redevelopment initiatives.

The US Highway One reconfiguration project that will commence in 2017 will encourage significant redevelopment activity in that corridor. The Village supports for complete street concept encourages redevelopment and sustainable initiatives. For example, the BB&T Bank is currently undergoing redevelopment of its site by demolishing the existing building and proposing a new structure and providing a more significant landscaping on site.

Urban Forestry

The Village of Tequesta will benefit by embracing urban forestry policies in its residential neighborhoods and commercial areas. Urban forestry is the careful care and management of tree populations in urban settings for the purpose of improving the urban environment. Urban forestry advocates the role of trees as a critical part of the urban infrastructure. Urban foresters plant and maintain trees, support appropriate tree and forest preservation, conduct research and promote the many benefits trees provide.

Urban forests bring many environmental and economic benefits to cities. Among these are energy benefits in the form of reduced air conditioning by shading buildings, homes and roads, absorbing sunlight, reducing ultraviolet light, cooling the air, and reducing wind speed – in short improvement of the microclimate and air quality.



There are also economic benefits associated with urban trees such as increased land, property, and rental value. Well-maintained trees and landscaped business districts have been shown to encourage consumer purchases and attract increased residential, commercial and public investments. Numerous studies have shown the direct relationship between home value, public health, and street trees. In her article “City Trees and Property Values,” Kathleen L. Wolf writes that there is a home price increase between 6-9 percent when there is good tree cover in a neighborhood, and a 10-15 percent increase when there are mature trees in a high income neighborhood.

Urban forests also improve air quality, absorb rainwater, improve biodiversity and potentially allow recycling to 20% of waste which is wood-based. Many cities today are dealing with stormwater management system issues where their existing systems can no longer hold the volume of water that falls in storms. One sustainable solution to this is planting street trees with grates underneath them to hold water. Trees and their soils work to filter runoff pollution and soil contaminants by absorbing them and processing them into less harmful substances. They

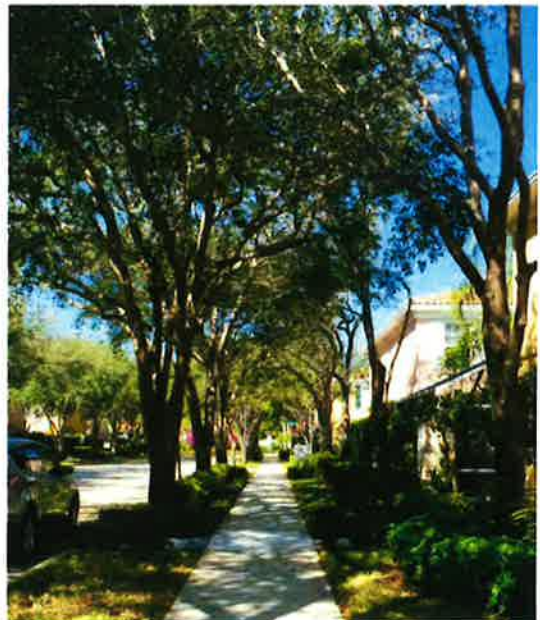
also collect water in their limbs and release it back into the atmosphere over time. This makes trees a solution to stormwater runoff issues and urban heating issues.

Urban forestry can be subject to NIMBY (not in my backyard) arguments as people occasionally experience trees as a nuisance or as a cause for disputes between neighbors. Frequent citizen complaints include too much shade; leaf litter; low hanging and falling branches; undesirable seeds, pods or fruits; and bird droppings. Many of these objections can be overcome by good educational efforts and by careful selection, placement, and routine maintenance of trees. The benefits of trees in our communities far outweigh any real or perceived inconveniences.

Another area of concern is the damage to homes and buildings that can result from tree roots or falling trees. Cases of damage to building foundations from invasive roots are typically the result of improper siting of trees and buildings relative to each other. The young sapling planted by the front door today will be the giant oak of tomorrow with roots damaging walkways and foundation. Proper education about site and species selection is critical. Falling trees often result from unstable root systems and/or severe storms. It is important understand regional soil types and the routine maintenance necessary to promote healthy root systems and to reduce the other circumstances that would cause a tree to fall (disease, rotten wood, a too-heavy crown, etc.) Nonetheless, the damage from trees remains low in proportion to the number of trees and the many direct and indirect benefits they provide.

The following should be considered when formulating codes and standards for Urban Forestry:

- Include clear and concise definitions of key terms
- Include risk assessment evaluation requirements
- Define minimum landscape standards and mitigation requirements
- Specify what type of trees are required in certain locations
- Provide incentives or penalties to developers, landscape architects, etc.
- Provide educational opportunities for the community



A number of cities in South Florida supports Urban Forestry and they also qualify as a *Tree City USA* community. The following cities are Tree Cities in the state of Florida: Boca Raton, Boynton Beach, Delray Beach, Palm Beach Gardens, Royal Palm Beach and Lantana.

The sustainability and long term quality of life of the community will benefit by including urban forestry policies and code language in the Village's Comprehensive Plan and Land Development Regulations.



Green Roofs

On hot summer days, the surface temperature of a vegetated rooftop can be cooler than the air temperature, whereas the surface of a traditional rooftop can be up to 90°F (50°C) warmer (Environmental Protection Agency).

Green roofs prohibit the majority of ultraviolet radiation from penetrating the rooftop which equates to air conditioning savings and longer roof replacement periods. They also provide habitat for butterflies and birds while filtering the rooftop water and creating less strain on storm water systems. Vegetated roofs use and filter the excess water while traditional roofs typically acquire pollutants and contribute to nonpoint source pollution which ultimately goes into the Atlantic Ocean. Green roofs can be used to mitigate storm water runoff requirements while providing for an aesthetically pleasing built environment. Basic green roof systems can be installed with little or no additional engineered structural support and add about 80-150 pounds/sq. ft. for intensive green roofs while extensive green roofs add about 12-50 pounds/square feet.

Green roofs have been successful at several locations throughout Florida. The photos below include projects in Jacksonville (Breaking Ground Contracting Green Roof & Rooftop Garden); Orlando (Orlando Health MD Anderson Cancer Center Labyrinth Vegetated Roof Garden); Clermont (Honda Headquarters); and Miami (FIU College of Nursing & Health Sciences, Modesto A. Maidique Campus).



Sea Level Rise Considerations

Adaptation and Resiliency

Sea level rise has long been recognized by the South Florida Water Management District and by the U.S. Army Corps of Engineers as an increasing threat to low lying, porous South Florida. Organizations such as the Southeast Florida Regional Climate Compact have provided reports and publications that have increased awareness and expanded the knowledge of the impacts of sea level rise on coastal communities in South Florida.

Rising sea levels due to the melting of the polar ice caps contribute to greater storm damage; warming ocean temperatures are associated with stronger and more frequent storms; additional rainfall, particularly during severe weather events, leads to flooding and other damage; an increase in the incidence and severity of wildfires threatens habitats, homes, and lives; and heat waves contribute to human deaths and other consequences.

Given the geography of Florida, coastal communities in Southeast Florida have long known how to incorporate hazard mitigation with long-term planning to reduce the loss of life and property

and lessen the impact of disasters (hurricanes, severe weather events, flooding, etc.). The challenge of adaptive planning for sea level rise goes beyond hazard mitigation. Rather than preparing for a specific disaster or event, a resilient community is one that can face an array of unpredictable challenges and disturbances with minimal long-term impacts. Certain communities, especially in coastal areas, must be prepared for future conditions that may not allow the same development intensity, location, type, or access. Through the use of innovative tools and strategies it is possible to transition these economies and the built environment into resilient communities that adapt to these adverse impacts.

With the currently accepted sea level rise projections and known climate impacts, long-range planning must now incorporate resiliency strategies that balance mitigation and adaptation for the protection of the natural systems and to sustain the socio-economic characteristics of the community. Understanding how mitigation and adaptation act as interconnected relationships to building resilient and sustainable coastal communities is vital for adaptive planning.

Due to impacts from sea level rise, the following initiatives are encouraged to address sea level rise and promote sustainable growth:

- Conserve, reuse, recycle
- Walk, bike, carpool, or use mass transit
- Building 'green' energy efficient buildings
- Encourage mixed land uses
- Provide incentives for business/residential responsibility
- Sustain water quality
- Limit dependence on oil
- Educate individuals on the aforementioned items

Many states, including Florida, and businesses within the state, have incentives and programs available for residents, businesses, governments, non-profits, schools, institutions, etc. The funds can be used to install energy efficient products such as the following; photovoltaic cells, solar hot water heaters, solar pool heaters, and fuel cells. The incentives generally pay by kilowatt hour for installed products which will conserve electricity over the lifetime of the product.

So far, the effects of sea level rise have been most visible in Fort Lauderdale, Miami Beach, and in the Florida Key. Moreover, even nearby Delray Beach is already seeing "King tide" flooding. Portions of Fort Lauderdale experiences flooding and has built "Adaptation Action Areas" (AAA) into their planning process.

Due to its southern location, Miami Beach is experiencing problems with severe flooding, which has led to an aggressive sea level rise prevention and adaptation program. Understanding this vulnerability has allowed for the development of both short-term and long-term adaptation strategies that would further strengthen this city's resilience.

One such strategy is the Miami Beach Rising Above Resiliency Strategy, which will guide the community as it survives, adapts, and grows amidst both chronic stresses, including sea level rise, coastal erosion, transportation, and lack of affordable housing, and occasional shocks, such as hurricanes, infrastructure failure, coastal flooding, rainfall flooding. Miami Beach will prioritize actions that provide benefits and results from investments to make us both resilient and sustainable day to day and in the face of disruptions. Based on data and expertise, and including employees, committees, residents, businesses, peer cities, and the Compact, the strategy will be built on the City's own unique successes, strengths, capabilities, challenges, and gaps.

The ultimate goal of these actions is to leverage existing resources to develop a mutually-beneficial solution that helps combat sea level rise challenges in Miami Beach and other coastal municipalities.

With higher sea levels, stormwater systems no longer drains as quickly, increasing the frequency and depth of flooding in some streets. The threat of salt water intrusion into the aquifer is another important and growing concern. As sea level continues to rise, salt water from the sea pushes further inland, coming ever closer to contaminating surficial drinking water wells. Scientists and engineers predict that within 40 to 50 years, Florida could be inundated with problems related to sea level rise.

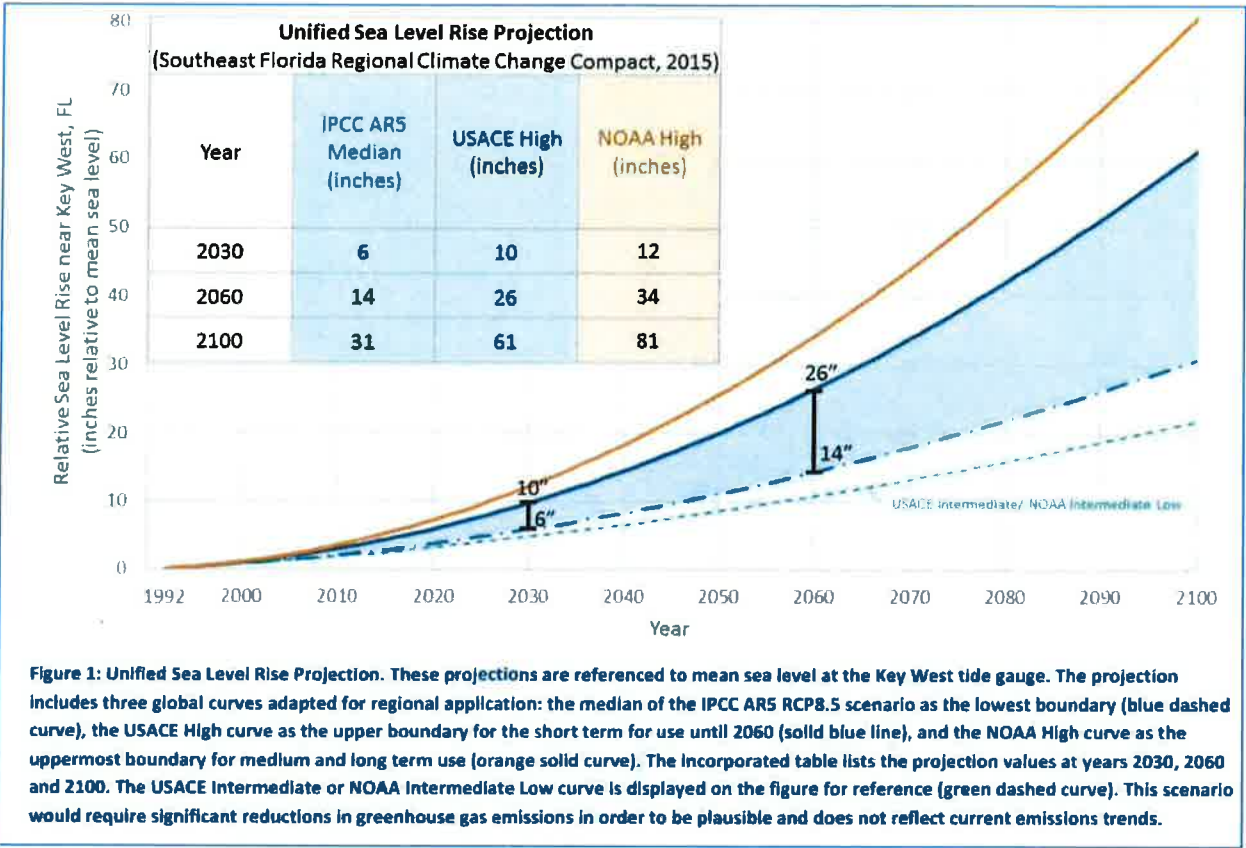
Southeast Florida Regional Climate Change Compact

The Southeast Florida Regional Climate Change Compact was executed by Broward, Miami-Dade, Monroe, and Palm Beach Counties in January 2010 to coordinate mitigation and adaptation activities across county lines. The Compact represents a new form of regional climate governance designed to allow local governments to set the agenda for adaptation while providing an efficient means for state and federal agencies to engage with technical assistance and support. It is in that spirit that this plan provides the common integrated framework for a stronger and more resilient Southeast Florida starting today and for tomorrow.

In order to better coordinate local planning, the Southeast Florida Regional Climate Change Compact (the Compact) developed unified regional sea level rise projection for Southeast Florida. The Unified Sea Level Rise Projection (unified projections) were originally prepared in 2011 by the Compact's Sea Level Rise Technical Advisory Group, comprised of representatives from county governments, United States Army Corps of Engineers (USACE), National Oceanic and Atmospheric Association (NOAA), United States Geological Survey (USGS), the South Florida Water Management District, and climate scientists from Florida Atlantic University and University of Miami.

The Unified Sea Level Rise Projections are the only regionally-coordinated and locally-specific sea level rise projections for the Southeast Florida region. The projections are updated regularly by a qualified group of scientists and experts, so planners should consider the projections to be both scientifically sound and timely.

Figure 1-4. Unified Sea Level Rise Projection for Southeast Florida, 2015.



Source: Southeast Florida Regional Climate Change Compact, 2015.

Florida Senate Bill (SB) 1094

Recognizing the priority to integrate sea level rise into local government planning, Florida Governor Rick Scott signed S.B. 1094 in May 2015, amending the state comprehensive planning laws (F.S. 163.3178(2)(f)) that had stipulated local governments, required to have a coastal management element in their comprehensive plan, include a redevelopment component to “eliminate inappropriate and unsafe development in coastal areas”.

Furthermore, SB 1094 requires coastal management plans to include the reduction of flood risks and losses. It also creates new requirements related to flood elevation certificates, and revises requirements related to flood insurance.

Specifically, SB 1094, Section 1, amends s. 163.3178(2)(f), F.S., to require local governments when drafting their comprehensive coastal management plans to:

- Include development and redevelopment principles, strategies, and engineering solutions that reduce the flood risk in the coastal zone which results from high-tide events, storm surge, flash floods, stormwater runoff, and the related impacts of sea-level rise.

- Encourage the use of best-practices development and redevelopment principles, strategies, and engineering solutions that will result in the removal of coastal real property from flood zone designations established by the Federal Emergency Management Agency.
- Identify site development techniques and best practices that may reduce losses due to flooding and claims made under flood insurance policies issued in this state.

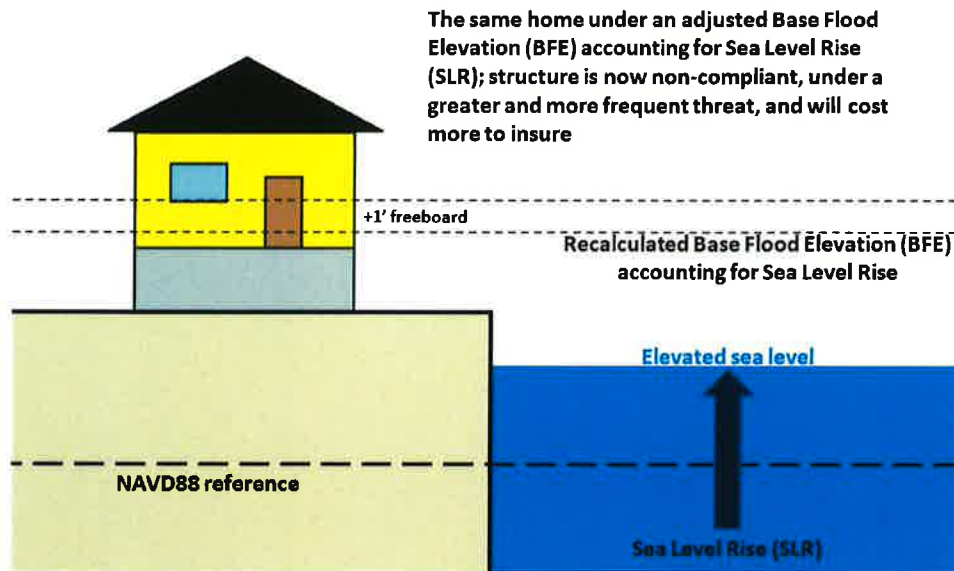
Local Flood-Related Ordinances

The Village seeks to develop techniques and best practices that may reduce losses due to flooding and claims made under flood insurance policies issued in this state. In addition to state agencies, the Village's Building Department regulates the building of structures in flood-prone areas so that flood damage can be minimized or avoided. The Village has continued to support these programs and work with residents and businesses in regard to program requirements. Moreover, the Village recently passed an ordinance related to FEMA's updated flood zone maps and is considering passing an ordinance related to flood hazard prevention techniques that will increase the "freeboard" height requirements, as detailed below.

On July 13, 2017, the Village of Tequesta Council adopted Ordinance 7-17 providing that the Federal Emergency Management Agency has revised and reissued the Flood Insurance Study and Flood Insurance Rate Map for Palm Beach County, Florida, and Incorporated Areas, effective October 5, 2017. The Village of Tequesta participates in the National Flood Insurance Program (NFIP) and the Village Council of the Village of Tequesta desires to continue to meet the requirements of Title 44 Code of Federal Regulations, Sections 59 and 60, necessary for participation.

As discussed in the previous section, NFIP provides federally backed flood insurance within communities that enact and enforce floodplain regulations. The Community Rating System (CRS) is a national program developed by the Federal Emergency Management Agency (FEMA). To be covered by a flood insurance policy a property must be in a community that participates in the NFIP. To qualify for the NFIP, a community adopts and enforces a floodplain management ordinance to regulate development in flood hazard areas. The CRS Program recognizes, encourages and rewards communities that go beyond the minimum required by the NFIP. Under the CRS, the flood insurance premiums of a community's residents and businesses are discounted. A community receives a CRS classification based upon the total credit for activities such as Public Information; Mapping and Regulations; Flood Damage Reduction; and Warning and Response. The Village of Tequesta is part of the CRS Program, "Class 7" rating which allows residents to receive 15% discount of their flood insurance.

Figure 1-5: Adjusted Base Flood Elevation, Accounting for Sea Level Rise



Currently, the Village of Tequesta is reviewing a potential ordinance amendment to Chapter 14 of the Village's Code of Ordinances to require 18 inches of freeboard above the base floor elevation in flood zone areas. This provision will contribute to mitigating sea level rise flooding effects that continue to threaten coastal areas Tequesta.

Freeboard refers to the height of a building above the Base Flood Elevation for a specific site. Florida regulations often require at least one-foot of freeboard for elevated buildings. Each foot of freeboard (up to a maximum of three feet), lowers flood insurance rates significantly. Since elevations on FIRMs do not include sea level rise, freeboard will help keep structures above floodwaters as storm surge elevations increase, thus reducing flood insurance premiums. The graphic below shows an example on how to implement this concept.

The Village of Tequesta contains several parcels on the barrier island that contain multi-family condominium developments. While there are not currently any single family homes along the ocean front within Tequesta, the freeboard technique could be considered for future development or redevelopment in this area.

Adaptation Action Areas (AAA)

The Community Planning Act (CPA) made changes to the state's growth management laws in 2011, including the optional adaptation planning for coastal hazards and the potential impacts of sea level rise. The Adaptation Action Area, as defined in the CPA, is an optional comprehensive plan designation for areas that experience coastal flooding and that are vulnerable to the related impacts of rising sea levels for prioritizing funding for infrastructure and adaptation planning.

Local governments that adopt an adaptation action area may consider policies within the coastal management element in their comprehensive plan to improve resilience to coastal flooding.

Criteria for the adaptation action area may include: areas below, at, or near mean higher high water; areas which have a hydrological connection to coastal waters; or areas designated as evacuation zones for storm surge.

Florida Statute (163.3164(1)) states, *“Adaptation action area” or “adaptation area” means a designation in the coastal management element of a local government’s comprehensive plan which identifies one or more areas that experience coastal flooding due to extreme high tides and storm surge, and that are vulnerable to the related impacts of rising sea levels for the purpose of prioritizing funding for infrastructure needs and adaptation planning.”*

Florida Statute (163.3177(6)(g)(10)) states, *“At the option of the local government, develop an adaptation action area designation for those low-lying coastal zones that are experiencing coastal flooding due to extreme high tides and storm surge and are vulnerable to the impacts of rising sea level. Local governments that adopt an adaptation action area may consider policies within the coastal management element to improve resilience to coastal flooding resulting from high-tide events, storm surge, flash floods, stormwater runoff, and related impacts of sea-level rise. Criteria for the adaptation action area may include, but need not be limited to, areas for which the land elevations are below, at, or near mean higher high water, which have a hydrologic connection to coastal waters, or which are designated as evacuation zones for storm surge.”*

FINAL REMARKS

Based on the present analysis, the Village should continue to implement specific strategies and policies to encourage and promote compact development patterns, which include the following:

- Promoting infill and redevelopment in appropriate locations in major commercial corridors and increased flexibility in the Village’s land development regulations;
- Promoting walkable and connected neighborhoods that provides for a mix of uses at urban densities and intensities that support a range of housing choices and a multi-modal transportation system;
- Improving non-auto dependent connectivity between residential, shopping, entertainment and employment areas through the provision of interconnected sidewalks, bike lanes/paths and expanded transit service;
- Directing future economic growth and associated development to areas of the Village in a manner that does not have an adverse impact on and protects natural resources and ecosystems through specific policies in the Comprehensive Plan and implementation through the Village’s zoning and land development regulations;
- Continuing supporting green and energy efficient policies;
- Continue promoting and implementing techniques and strategies that reduce the risk of flood hazards and enhance stormwater management facilities;
- Supporting urban forestry policies and land development regulations; and
- Continuing proactive annexation approach.



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