

**City of Fort Lauderdale, Florida**  
Request for Proposals #705-10541 | Consulting Services for Visioning Project



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October 20, 2010

Procurement Services Department  
City of Fort Lauderdale  
100 N. Andrews Avenue, Suite 619  
Fort Lauderdale, FL 33301

**Re: Request for Proposals Community-wide Visioning Effort**

Dear Committee Members:

**AECOM**, in association with the **University of Florida Center for Building Better Communities**, is pleased to submit this proposal to lead a community-wide Visioning Process for the City of Fort Lauderdale.

AECOM has extensive national expertise in every aspect related to visioning, planning and community building, including the "core drivers" identified by the City. The University brings a reputation of depth, quality and neutrality to those same fields. And best of all, we are local; the lead consultants of both AECOM and UF are based in Palm Beach County and have decades of experience in Fort Lauderdale and Broward County. Additionally, we have included on our team the **Mosaic Group**, a minority-owned firm that specializes in community outreach to the otherwise unheard or disenfranchised.

We believe that the City of Ft. Lauderdale and its residents, property owners and businesses will be well served by this team. We are ready to deliver a highly inclusive, accessible and transparent visioning process that enables all voices to be equally heard, and cost-effective, locally- responsive quality products in a timely fashion.

As one of our team members, who lived and worked in the City of Ft. Lauderdale for nearly ten years stated, "I watched Ft. Lauderdale grow into a major cosmopolitan center with its promise of becoming the best City of its size in the U.S. This visioning project raises the bar." Congratulations on your personal visions to put this project forward. We look forward to working with you, your citizens, your leaders and your staffs.

Respectfully submitted on behalf of AECOM and the University of Florida,



David L. Barth, ASLA, AICP, CPRP  
Principal-in-Charge  
david.barth@aecom.com

proposal signature page

01



BID/PROPOSAL SIGNATURE PAGE

How to submit bids/proposals: It is preferred that bids/proposals be submitted electronically at www.bidsync.com, unless otherwise stated in the bid packet. If mailing a hard copy, it will be the sole responsibility of the Bidder to ensure that the bid reaches the City of Fort Lauderdale, City Hall, Procurement Department, Suite 619, 100 N. Andrews Avenue, Fort Lauderdale, FL 33301, prior to the bid opening date and time listed. Bids/proposals submitted by fax or email will NOT be accepted.

The below signed hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the CITY and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

Please Note: If responding to this solicitation through BidSync, the electronic version of the bid response will prevail, unless a paper version is clearly marked by the bidder in some manner to indicate that it will supplant the electronic version. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

Submitted by: [Signature] October 20, 2010
(signature) (date)

Name (printed) David L. Barth Title: Principal

Company: (Legal Registration) AECOM Technical Services, Inc.

CONTRACTOR, IF FOREIGN CORPORATION, MAY BE REQUIRED TO OBTAIN A CERTIFICATE OF AUTHORITY FROM THE DEPARTMENT OF STATE, IN ACCORDANCE WITH FLORIDA STATUTE §607.1501 (visit http://www.dos.state.fl.us/ ).

Address: 222 Clematis Street Suite 200

City West Palm Beach State: FL Zip 33401

Telephone No. 561.659.6552 FAX No. 561.833.1790 Email: david.barth@aecom.com

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions):

Payment Terms (section 1.03): Total Bid Discount (section 1.04):

Does your firm qualify for MBE or WBE status (section 1.08): no MBE WBE

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No. Date Issued

(Addn 1 September 22) (Addn 2 September 23) (Addn 3 September 28) (Addn 4 September 28)

VARIANCES: State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. HAVE YOU STATED ANY VARIANCES OR EXCEPTIONS BELOW? BIDDER MUST CLICK THE EXCEPTION LINK IF ANY VARIATION OR EXCEPTION IS TAKEN TO THE SPECIFICATIONS, TERMS AND CONDITIONS. If this section does not apply to your bid, simply mark N/A in the section below.

Variations: N/A

## statement of qualifications

The City of Fort Lauderdale is kicking off its 100th year with a celebration of its past, present and future. That effort includes a parallel initiative to develop a new vision for the City that embraces its entire 33 square miles (all of its neighborhoods and commercial areas as well as the downtown and coastal areas), takes a 25-year next generational view, and is inclusive, holistic, strategic, and measurable.

### We understand that:

- The goal is a Citywide vision that bubbles up from, expresses the hopes and view-points of, and belongs to the citizenry (from all areas of the City and all ages and backgrounds). That, the committee has emphasized, will require reaching out and carefully listening to all members of the diverse community that is Fort Lauderdale today, with particular attention to reaching and meaningfully engaging those who are often under-represented in public planning processes.
- The visioning process should take a comprehensive look at the full range of issues facing the City. As a first step, in its first meeting the Vision Committee asked for reports on current conditions and the state-of-the-art practices in the areas of the general health of the City as well as higher and primary education, arts and culture, public safety, economic development, waterways and beaches, government relations, quality of life, neighborhoods, parks and recreation, infrastructure, and eco-friendly, green initiatives. The committee also heard from the Northwest-Progresso-Flagler Heights Community Redevelopment Agency that important issues in its service area include creating housing opportunities, business growth development, and investments in infrastructure improvements.
- The process to develop the vision should be transparent and highly accessible by all residents and offer multiple ways to participate and contribute ideas. The resulting vision should be used to inform and guide government policies and decision-making and should clearly articulate what the City is today, what it can be in the future, and how to get to where it wants to go. It would serve as a roadmap that clearly articulates the community's shared goals, a set of consensus-based actions to achieve those goals, and a set of measurements that can be used to evaluate and document progress.
- The vision should inspire action rather than being another plan that sits on a shelf. As one speaker on visioning, paraphrasing Daniel Burnham, observed:

***“You Don't want to make small plans; you have to [make] plans that inspire people to do something.”***

Names discussed for the vision process sum up the City's hopes of a forward-looking, inclusive, and widely shared vision that brings the entire community together and charts a course for the City's future. They include "Fort Lauderdale 2020," "New Century – New City," and "Best City of its Size." Other suggestions include "One Fort Lauderdale," "One Voice," "Next Generation," and "One Voice – One Vision."

## Unique Qualifications

The qualifications provided in this submittal are extensive and unique for we are a combination of AECOM and the University of Florida's Center for Building Better Communities. As stated in our cover letter, AECOM has extensive national expertise in every aspect related to visioning, planning and community building, including the "core drivers" identified by the City. The University brings a reputation of depth, quality and neutrality to those same fields. And best of all, we are local. The lead consultants of both AECOM and UF are based in Palm Beach County and have decades of experience in Fort Lauderdale and Broward County. Additionally, we have included on our team the Mosaic Group, a minority-owned firm that specializes in community outreach to the otherwise unheard or disenfranchised.

The AECOM team is uniquely qualified to assist the City in this effort. In collaboration with the University of Florida's Center for Building Better Communities and the Mosaic Group, we offer the City the perfect combination of local knowledge and presence; local, regional, state and national experience in community outreach and visioning; professional leadership; and a sound belief and passion for visioning through broad-based public outreach and engagement.

## Local Knowledge and Presence

Since opening our West Palm Beach office in 1998, AECOM (formerly Glatting Jackson) has continued to provide visioning, planning and design services to the City of Ft. Lauderdale, the Fort Lauderdale CRA and Broward County. All of our work has included extensive public outreach and visioning through stakeholder interviews, workshops, charrettes, surveys and public meetings. Our early work included a conceptual vision plan for Himmarshee Village and a community workshop for the Floyd Hull Stadium and Caldwell Tract. In 2001 we prepared the Broward County Greenways Master Plan, engaging residents and stakeholders throughout the County to develop a long range vision and implementation/ action plan for a countywide system of greenways and trails.

Working with the CRA, we developed the Precinct Plan for the Flagler Village area of the City in 2006; public visioning and outreach techniques included stakeholder interviews, steering committee meetings and design workshops. In 2008 we worked with the City to develop the Long Range Strategic Plan for the City's Parks and Recreation System, engaging over 700 residents and stakeholders through public workshops (including a kid's workshop), interviews and surveys. Most recently we have been working with the City, Broward County and the Florida Department of Transportation (FDOT) on the SR A1A Greenway Ideas and Opportunities Study, which included public workshops, stakeholder interviews and meetings with neighborhood groups along the corridor.

The University of Florida's Center for Building Better Communities also has significant local knowledge and presence. Senior Fellows Marie L. York, FAICP, and Jean Scott, are also located in Palm Beach County, and are very familiar with the City through their previous work. In 1995 Marie, as a senior researcher with Florida Atlantic University's FAU/FIU Joint Center for Environmental and Urban Problems, was a writer of the Policy Statement for Ft. Lauderdale's American Assembly, upon which much of the City's vision today is based. Previously, in 1987 she organized a Comprehensive Management and Staff Retreat for the City and directed and contributed to the final State of the City Report. In 1998 she facilitated Ft. Lauderdale's efforts in establishing an Affordable Housing Incentive Ordinance. More recently, Marie led a three-city cultural arts study in Broward County that included the residential neighborhoods around the Broward Center for the Performing Arts. In addition, Marie lived and worked in the City of Ft. Lauderdale for over ten years, enjoying the City's many attributes and participating in its civic life.

Jean Scott is currently assisting Winter and Company with the City Neighborhood Development Criteria project. As a Senior Fellow with the Center for Urban and Environmental Solutions (located in downtown Fort Lauderdale) at Florida Atlantic University she also planned and managed a Peer Review Panel for the Broward County School Board's Amended Interlocal Agreement for Public School Facility Planning and assisted the South Florida Regional Planning Council with two State Road 7/US 441 Collaborative projects (preparation of a model process report on the work of the partnership and assisting with planning a design workshop).

## Examples of our Regional, State and National Experience

Our team's local knowledge is complemented by our planning and visioning experience throughout Florida and the United States. Related visioning processes and projects include:

- *Smart Growth North Miami Beach Visioning Process and Urban Design Plan*
- *Smart Charlotte 2050 Comprehensive Plan*
- *City of Largo Strategic Vision Plan*
- *Sarasota County 2050 Resource Management Area Plan*
- *Bluegrass Tomorrow, Kentucky Vision and Corridor Management Planning Handbook*
- *Martin County Sustainable Community Vision Plan*
- *Downtown San Diego Needs Assessment for Parks and Open Space*
- *Highlands County Strategic Framework Vision Plan*
- *St. Lucie County Western Lands Study*
- *East Miramar Neighborhood Vision Plan*
- *50 Year Miami-Dade County Open Space Master Plan*
- *Downtown Orlando Community Venues Master Plan*
- *City of Palm Beach Gardens Building Height Visioning Workshops*
- *Town of LaBelle Vision Plan*
- *City of Lakeland Downtown Vision Plan*
- *Bay Harbor Islands Community Vision Plan*
- *Johnson City, Tennessee Land use and Transportation Vision Plan*
- *City of Bradenton EAR and Comprehensive Plan Update*
- *Florida Public Officials Design Institutes (over 40 communities' participated from 2002-2009)*
- *City of Fellsmere Your Town Design Workshop for the National Endowment of the Arts*
- *Lauderhill, Lauderdale Lakes and Broward County Arts and Cultural Corridor Facilitation and Strategic Planning*
- *City of Wilton Manors, Visioning for Redevelopment*
- *City of Ft. Lauderdale Workshops to Develop Affordable Housing Strategies*
- *City of Miramar, Strategic Planning*
- *City of Fort Lauderdale, Comprehensive Planning Management and Staff Retreat*
- *City of Lake Worth, Strategic Planning Retreat*
- *Pahokee Vision Setting American Assembly*
- *Florida Chapter American Planning Association statewide American Assembly; Future of Florida--Land, Water, and Community*
- *Jackson County, Florida, award winning Visioning Project (IMAGINE Jackson)*
- *City of Fort Lauderdale Neighborhood Criteria Project*
- *Committee for a Sustainable Treasure Coast Regional Visioning Project*
- *City of Lexington, Kentucky Community Legacy Visioning Project*
- *Palm Beach County Strategic Planning for Economic Development*
- *Martin County Economic Development Program for Indiantown*
- *Broward County Economic Impact Analysis of the Cultural Arts*

Four recent visioning projects illustrate our broad experience with public outreach projects that are particularly relevant to the City of Fort Lauderdale's Visioning Process. In West Palm Beach, AECOM conducted a visioning process for Coleman Park, one of the City's most economically depressed and under-represented neighborhoods. Outreach efforts included a walking tour of the neighborhood with residents and elected officials (advertised through door hangars at every residence); stakeholder interviews; neighborhood association meetings; kids' workshops; neighborhood workshops; and steering committee workshops and meetings. The outcome of the process was a Neighborhood Improvements Plan addressing the issues and actions most relevant to residents, business owners, property owners and other stakeholders.

In Atmore, Alabama AECOM has been working with another under-represented group of citizens, the Poarch Band of Creek Indians, to develop a community vision and master plan. We have been highly successful at reaching tribal members who do not typically participate in public planning processes; techniques have included countless one-on-one interviews with key stakeholders, interviews at the tribal Senior Center, meeting with youth groups, public meetings and charrettes, surveys, an interview booth at special events, advertisements in the tribal newsletter and others. The outcome of the process is a new Vision Plan for the tribe along with recommendations for both short-term and long-term actions to implement the Plan.

A third project, led by Marie L. York, included the communities of Lauderhill, Lauderdale Lakes and the unincorporated area around the Broward Center for the Performing Arts. This undertaking included personal interviews and public workshops reaching out to the under-represented residents for the purpose of creating a plan for a cultural arts corridor.

Jean Scott was involved in an extensive neighborhood outreach program for the Newtown Pike Extension project in Lexington, Kentucky that was to cut through and separate eight very low-income neighborhoods. Because of the neighborhood- and environmental justice-driven process, the initial proposal of building an Interstate-style, limited access, and in places, elevated, expressway was altered. Instead, the now at-grade road is designed as a boulevard that will maintain the connections within and between neighborhoods and enhance the quality of life. Outreach techniques included holding planning meetings in the neighborhood community center, basing a project coordinator in the neighborhood, sponsoring neighborhood social events, and conducting door-to-door in-person visits to each home. To gain full participation, a trusted neighborhood leader accompanied the surveyors from the team.

## Professional Leadership

Our team members are passionate about engaging community residents to develop compelling visions and action plans for the future, and are actively involved in research, writing, and lecturing regarding visioning and public outreach in addition to our project-related experience.

- For the past three years, **David Barth** has taught a Visioning short course to County Commissioners throughout Florida at the Florida Association of Counties (FAC) Advanced County Commissioner Program. The course, titled “10 Principles for Successful Community Visioning and Implementation” outlines the public visioning process including defining the purpose and expectations for the visioning process; alternative techniques for community outreach and involvement; and focusing on implementation.
- **Marie L. York** co-founded, directed and facilitated the award-winning Florida Public Officials Design Institute at Abacoa from 2002-2009. This program was created to empower a broad cross section of public officials to discover creative solutions for sustainable development within their specific communities, with an emphasis on community involvement. The Design Institute won awards from the Council for Sustainable Florida, the American Planning Association Florida Chapter and 1000 Friends of Florida for this innovative work. Additionally, Marie is a Life Coach certified by the San Diego Life Purpose Institute. This training has been particularly useful in understanding and working with disenfranchised groups and individuals who often are reluctant to participate in a government sponsored process. Marie lectures for the Planning Commissioners Training Program for the American Planning Association Florida Chapter each year, bringing a strong focus on public participation as part of her presentations on smart growth and sustainable design. For the nearly ten years that she taught as an adjunct professor for Florida Atlantic University, she always stressed the importance of the public participation process and citizen involvement.
- **Jean Scott** developed *The Florida Planning Toolbox* <[cues.fau.edu/toolbox](http://cues.fau.edu/toolbox)> for the FAU Center for Urban and Environmental Solutions (CUES) and the Florida Department of Community Affairs to further visioning projects in Florida. The peer-reviewed toolbox provides descriptions and Florida examples (including from Fort Lauderdale) of planning tools in the areas of diversity and social capital benchmarking, housing, education and health, climate change, coastal planning, infill and redevelopment, transportation and water resource planning, land use planning, fiscal analysis and financing, agricultural land conservation, and natural systems conservation. An entire toolbox chapter focuses on public involvement, education and visioning models. Her work on visioning, outreach and communication has been featured in presentations to groups such as the American

Planning Association, the Florida Chamber of Commerce Short Course on Growth Management and Environmental Permitting and the Florida Chapter of the American Planning Association (Florida APA). Her articles on effective habits of visioning (which emphasized reaching out to and engaging the unusual as well as usual suspects), use of peer reviews in planning processes and features of successful charrettes as a tool for community building and transformation change were published in Florida Planning, the newsletter of the Florida APA. The Jackson County, Florida, visioning project for which she managed the outreach and communication earned a Promising Practice Award from the Council for a Sustainable Florida. The seven-county visioning process in the Bluegrass region of Kentucky that Scott designed and implemented was recognized nationally by such groups as the Lincoln Institute of Land Policy, the National Trust for Historic Preservation, New Partners for Smart Growth and the National Association of Local Government Environmental Professionals.

## Technical Expertise

AECOM and the University of Florida have expertise in all of the “core drivers” identified by the City, including:

- Community Identity/ Image/ Attitude
- Economic Development
- Education
- Government
- Infrastructure/ Transportation
- Marine Interests and Industries
- Public Safety
- Quality of Life/ Neighborhoods/ parks/ Recreation
- Tourism Interest and Industries

**AECOM** is a global provider of professional technical and management support services to a broad range of markets - including transportation, facilities, environmental, energy, water and government – and our local team has access to over 43,000 specialized AECOM professionals in 100 countries.

**The University of Florida Center for Building Better Communities**, located in the University’s College of Design, Construction and Planning, focuses on building the planning and growth management capacity of Florida’s local governments, and provides resources and programs to help planning practitioners develop sustainable, healthy and well structured cities. The CBCC combines the expertise of faculty and seasoned professionals with the work of graduate students for projects across Florida and has access to hundreds of national and international experts throughout the University system.

## 03 preliminary scope of services

The AECOM team understands the City's desire, as outlined in the RFP, to conduct "A community-wide public dialogue and visioning effort to collect data for Vision Statement(s) and related Vision Action Plan(s) for City's Vision Committee review", and "To collect City-wide observations, opinions, wishes, dreams and recommendations detailing: what is good/right/don't change, concerns, visions and actions needed to achieve visions"

We also understand that the City wishes to:

- Use its 100th anniversary as "a springboard to launch a collaborative City-wide 25 year vision that will guide the City Commission in its policy and decision-making."
- Design a visioning process that addresses the "core drivers" outlined in the RFP, along with other issues identified by the community.
- Re-build trust and create a more collaborative environment by increasing its interaction and dialogue with the community.
- Reach under-represented residents and to be more inclusive so that the City-wide vision reflects the hopes and viewpoints of all of its residents.
- Be as cost-effective as possible in conducting a broad-based and community-focused and -driven visioning process.

Following is our General Approach to meeting the City's objectives for the project, as well as a Preliminary Scope of Services for the City's review and consideration.



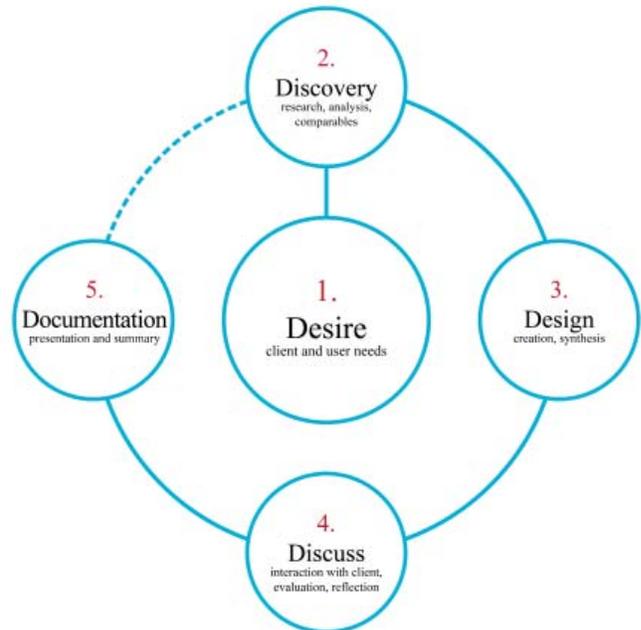
## GENERAL APPROACH - AECOM'S 5D PROCESS

We have developed a thoughtful approach to community visioning, planning and design based on 40-plus years of experience with communities similar to Fort Lauderdale throughout the United States. Based on that experience and the City's visioning RFP, we are proposing a process that is based on what we call the "5Ds"—that is: **desire, discovery, design, discussion and documentation**. The process assures you that we will listen carefully to your needs and desires; take the time necessary to thoroughly understand existing conditions; and develop thoughtful, innovative actions in response to our findings. The goal is a process that is known for fostering positive, respectful dialogue between people with different perspectives and backgrounds and for being transparent and responsive to, and inclusive of, all views and experiences, issues, and parts of the City. No idea would be considered too small. We also understand the importance of flexibility in responding to input as it is received, thus we expect that we will refine and adjust this process along the way.

The purpose of the **Desire Phase** is to verify and clarify the City's desires before proceeding with the project. We will meet with City staff, members of the Visioning Committee, City Commissioners and other key stakeholders (as determined by the City) to review the scope of work, discuss expectations for outcomes and deliverables, and talk about how the City will ultimately implement the elements of the vision statement. In a recent visioning process for the Buckhead area of Atlanta, for example, David conducted a "preliminary implementation workshop" with the project Steering Committee – *at the beginning of the project* – to identify available funding, partnerships and other potential implementation tools before proceeding with the vision. Based on that input, we will adjust the vision process if needed to assure that the process will achieve the agreed upon outcomes. For the Jackson County, Florida, visioning project, Scott and another vision team member conducted stakeholder interviews as a first step to assess vision readiness and, based on those interviews, worked with the Vision Committee and county to adjust the outreach and public education portion of the vision process scope. The resulting high level of public involvement from all parts of the county led a county commissioner to observe that no matter where he went in the county, the topic of conversation was the visioning project.

A variety of exercises will be used to maximize input from participants. Those who are more comfortable with visual exercises will have visual ways to express their views, while those who are more comfortable with the written word will be able to express their views in writing. In addition, people who are more comfortable speaking will have that opportunity.

- D1 Desire** – We listen to the desires of our clients to understand the intended vision.
- D2 Discovery** – We understand the physical, social, and cultural context; interview stakeholders; research front edge precedent.
- D3 Design** – Consider alternatives; test ideas and compare to Desires; involve and engage the Client.
- D4 Discussion** – Present alternatives; elicit feedback from Client/Stakeholders; engage the public and attain consensus.
- D5 Documentation** – Express the vision in a clear concise set of documents so that the Client, contractor, and Stakeholders will understand the intent to successfully implement the vision.



Once we have verified and clarified the City's desires, we immerse ourselves in the **Discovery Phase**. As outlined in the City's RFP, the Discovery phase has two parts: 1) understanding existing conditions, and 2) reaching out to residents and other stakeholders to find out their "observations, opinions, wishes, dreams and recommendations". The purpose of the first part, *the Existing Conditions Analysis*, is to identify and document existing conditions, opportunities and constraints to meeting the City's desires and objectives. The planning team will review reports, maps and data provided by the City; prepare base maps and overlays; conduct various types of analysis; conduct interviews; and document existing conditions, constraints and opportunities for each of the "core drivers" identified in the RFP, including:

- Community Identity/ Image/ Attitude
- Economic Development
- Education
- Government
- Infrastructure/ Transportation
- Marine Interests and Industries
- Public Safety
- Quality of Life/ Neighborhoods/ Parks/ Recreation
- Tourism Interest and Industries

Additionally the team will conduct driving and walking tours of the City, and create visual "tour maps" for individual members of the Visioning Committee, the City Commissioners and interested members of the public, along with photographs and a narrative outlining relevant features, so that decision makers and citizens have a first-hand view of conditions in various neighborhoods. The planning team will also research and analyze comparable communities and highlight state-of-the-art practices to identify potential examples and "lessons learned" from others. The Existing Conditions Analysis will be documented through an Existing Conditions Report, including maps, photographs, narrative and a PowerPoint presentation summarizing our findings.

The second part of the Discovery phase, *Community Outreach*, is the real heart of the Visioning process and will run concurrently with the Existing Conditions Analysis. The RFP states that the City wishes to engage "a broad, cross section of City business, civic organizations, religious institutions, non-profit entities, governments and educational groups, community/ resident members of all ages, elected officials, City staff, homeowner and community and selected regional organizations and study groups".

We will work with the City to identify the appropriate use of a variety of techniques to reach these various constituencies, including the techniques outlined in the RFP, such as:



- Community kick-off celebration
- Personal stakeholder interviews
- Focus group meetings
- Advisory board workshops
- Citizen ambassador outreach groups
- Steering committee/ visioning committee workshop
- Booths at community events and meetings
- Newsletters (electronic and print)
- Visioning information fact- and feedback-sheets at frequently visited gathering places (those places that people in a neighborhood generally go to each week)
- Citizens congress
- Interactive web site
- Mail/telephone survey
- Media briefings and op-ed contributions
- Display or bulletin board postings in frequently visited places such as churches, grocery stores and community centers
- Announcements of accepting digital photographs to be submitted to the websites regarding likes and dislikes in neighborhoods

Our goal is to make the visioning process what residents are talking about, want to be involved in and are paying attention to in all parts of the City. That will require an outreach program that is designed to fit each audience and accessing the message mediums (e.g., radio stations, newsletters, and community gathering places bulletin boards) most used by residents in different areas to receive and provide information and the peer messengers (those who are respected and known in a neighborhood). Our focus is a two-way information flow that uses multiple ways to get information about the process out to citizens and information from citizens back into the process. Particular attention will be given to reaching those residents who are traditionally under-represented in planning processes.

All outreach sessions will be designed to provide opportunities for honest, open discussion coupled with careful team listening to ensure that we thoroughly understand the complexities and nuances of stakeholders' needs, desires, concerns and issues. The findings from the Community Outreach will be a Community Outreach Summary Report, documenting the various outreach techniques and locations, the number of people who participated in each, and the common themes and ideas that emerged from the process. The summary report will also identify what vision participants identified as the top community needs and priorities that should form the basis of the Vision Statement and Vision Action Plan, based on community input.

The third phase of the 5D process, the **Design Phase**, involves the development of the appropriate response(s) to the first two phases. We will develop a preliminary Vision Statement and Vision Action Plan (as outlined in the RFP), including maps and graphics to illustrate key concepts and ideas. We will also recommend a process for the Commission to revisit the Vision Action Plan on a scheduled basis and evaluate progress as part of a vision success monitoring plan that contains an agreed-upon set of measurable indicators and benchmarks. The benchmarks establish quantifiable goals and the indicators are used to monitor and score progress toward the benchmarks. An example is a vision scorecard that would enable the city and residents to evaluate and have a dialogue about progress and guide the progress of vision plan implementation. The results can be used to celebrate successes, adjust strategies and actions as needed and understand how one issue relates to and is influenced by others. The Discussion phase of the process includes presentations, meetings and workshops to review and discuss the Vision Statement and Vision Action Plan. We will work with the City at the beginning of the process to identify the desired review/ approval process, and anticipate (at a minimum) that we will conduct review meetings with:

- Staff
- Visioning Committee
- General public
- City Commission

Based on the discussion, we will revise the Vision Statement and Vision Action Plan as necessary.

The purpose of the last phase of the project, the Documentation phase, is to develop the final reports, plans and graphics to document the process and to provide the City with the tools necessary to proceed with implementation. One of our most popular and useful documents is a color, stand-alone Executive Summary/ Poster that can be distributed (print or digital copies) throughout the community; posted on the City's web site; and displayed in City Hall, libraries, recreation centers, business and other locations throughout the City to keep the vision "alive". The Executive Summary/ Poster can also be used as a tool for grant applications and/or other fund raising/ implementation initiatives.



## PRELIMINARY SCOPE OF SERVICES

Following is a Preliminary Scope of Services outline for the Visioning Process, based on the 5D Approach/ Process outlined above. It is important to note that the basic Scope will not change based on the cost option selected by the City (**see Tab 7, Cost of Services**); rather, the level of detail will vary. Key differences between the three cost options include:

- The number of days allocated for Stakeholder Interviews (Part I)
- The level of detail provided for base maps and the existing conditions analysis (Part II)
- The number of days allocated for Interviews, Focus Groups and Workshops (Part III)
- The type(s) of survey tools selected for the process (Part III)
- Responsibility for the web site (Part III)
- The format(s) and quality of final documents (Part V)

Prior to finalizing an Agreement for the project, we will meet with the City to review the three cost options; discuss available data, expectations and desired levels of detail for the deliverables; and determine a final Scope of Services that meets the City's specific needs.

### Part I – Desire

- 1.1 Start-up Workshop** – Conduct a kick-off workshop with City staff and the Visioning Committee to review and discuss the project scope, schedule, deliverables and expectations; team responsibilities and resources; client responsibilities and resources; stakeholder involvement process; communication and outreach plan; review of base project data; and the quality review process. Also conduct interactive visioning exercises regarding desired vision, opportunities, constraints and implementation.
- 1.2 Stakeholder Interviews** – Conduct interviews with City Commissioners and other key stakeholders (as identified by the City) to verify and clarify desires and expectations for the project.
- 1.3 Adjustments** – Recommend any adjustments to the Visioning process, if appropriate, based on the Workshop and Interview discussions.

#### Deliverables:

- *Workshop, interview notes and meeting minutes*
- *Recommendations for any adjustments to the Visioning process*



### Part II – Discovery, Existing Conditions Analysis

- 2.1 Review Existing Data** – Review existing studies, GIS maps and data provided by the City. Prepare a summary of findings from the existing data review
- 2.2 Base Maps** – Using existing maps and data, prepare base maps or graphics for each of the core drivers identified by the City, including:
  - Community Identity/ Image/ Attitude
  - Economic Development
  - Education
  - Government
  - Infrastructure/ Transportation
  - Marine Interests and Industries
  - Public Safety
  - Quality of Life/ Neighborhoods/ parks/ Recreation
  - Tourism Interest and Industries
- 2.3 Bus/Trolley Tour** – Work with City staff, Visioning Committee members and other key stakeholders (identified by the City) to plan a one day bus or trolley tour of the City, making sure the tour meets the requirements of Florida's open meeting laws. The purpose is to form a common understanding of existing conditions. Conduct walking tours of key neighborhoods or other "hot spots" (areas that warrant special attention) during the tour. Create visual "tour maps" for individual members of the Visioning Committee and the City Commissioners taking the tour, along with photographs

and a narrative outlining relevant features, so that decision makers and others taking the tour have a first-hand view of conditions in various neighborhoods.

**2.4 Existing Conditions Analysis** – Conduct additional investigations, interviews and analysis to understand existing conditions for each core driver. *The level of detail of the analysis will be based on the Cost Option selected by the City.*

**2.5 Existing Conditions Report** – Produce an Existing Conditions Report, with supporting overlays, photographs and/or graphics, to summarize existing conditions for each of the Core Drivers. Careful attention will be given to making sure that the report is written in a way that the information can be easily used and digested. Submit a draft Report to the City for review.

**2.6 Review Meetings and Revisions** – Attend up to three (3) meetings with City staff, Visioning Committee and/or others to review and discuss the Existing Conditions Report. Make revisions to the Report based on comments received from the City. A variety of exercises will be used to maximize input from participants. Those who are more comfortable with visual exercises will have visual ways to express their views and those who are more comfortable with the written word

will have written ways to express their views. Likewise, for those who are more comfortable speaking will have that opportunity.

**Deliverables:**

- Data review summary
- Base maps
- Existing Conditions Report (draft and final)



## Part III – Discovery, Community Outreach

**3.1 Community Celebration Kick-off Event** – Help plan and participate in a City-wide Kick-off Event, celebrating the initiation of the Visioning process and providing opportunities to educate, inform and engage residents and other stakeholders. This may be conducted as a stand-alone event or as part of a special event that is already planned and scheduled for the community. The event should include food, entertainment and guest speakers to educate the public regarding each of the core drivers and the importance of having a community-supported vision for the future of the City. AECOM/UF will prepare information about the Visioning Process for distribution to participants including an explanation about the project, a general project schedule and methods that they can participate. AECOM/UF will also prepare an introductory survey to help solicit initial ideas from the community about their expectations, hopes, and concerns. To symbolize the breadth of involvement, participants in the kick-off event and all future vision events will have the opportunity to sign a vision banner. The banner would be displayed at each visioning event, stimulating interest and demonstrating the high level of participation. Participants will also have an opportunity to sign up to be on the visioning email list and to indicate their interest in serving as an outreach volunteer. If the City desired, we would also hold background briefings for local media to learn more about the process.



**3.2 Interviews, Focus Groups and Workshops** – Working with City staff and the Visioning Committee, identify key stakeholders (both individuals and groups) to be contacted for interviews including business, civic organizations, religious institutions, non-profit entities, governments and educational groups, community/ resident members of all ages, elected officials, City staff, homeowner and community and selected regional organizations and study groups. Examples may include: the Mizell Cultural Center and in it the Fort Lauderdale branch of the NAACP, the Northwest-Progresso-Flagler Heights Community Redevelopment Agency, the Dorsey-Riverbend Civic Association, the Progresso Village Civic Association, the Durrs Homeowners Association, the Home Beautiful Park Civic Association, the River Gardens/Sweeting Estates HOA, the Mount Olive Community Development Corporation, the New Visions Community Development Corporation and Walker Elementary.

**3.3 Survey** – Prepare a survey questionnaire for residents and stakeholders, and assist the City in conducting the survey. The Basic Cost option includes an internet-based survey to be conducted by the City using “Survey Monkey”; the Moderate and Comprehensive Cost options include a mail/ telephone survey to be conducted by a market research company such as Haysmar, Inc; *the number of surveys conducted will be based on the Cost Option selected by the City.* For those without computers, we will also have the survey available in print form for those without access to the internet. Print copies would be available at frequently visited locations within target communities and for hard to reach neighborhoods, distributed through trusted community members and organizations. The team would approach churches and neighborhood gathering places for help in enlisting support for the survey.

**3.4 Web Site** – Prepare camera ready graphics and a press release to assist the City in marketing the Visioning Process. Also develop, review, test, and maintain an interactive project website that allows updated displays of vision statements, surveys, project status summaries and reports. This web site provides a means for members of the community and other stakeholders to interact before, during, and after featured public process events, and throughout the life of the project.

**3.5 Community Outreach Summary Report** – Prepare a summary of the findings from the outreach techniques outlined above, documenting the various outreach

techniques and locations, the number of people who participated in each, and the common themes and ideas that emerged from the process. Also identify the top community needs and priorities that should form the basis of the Vision Statement and Vision Action Plan, based on community input.

- 3.6 Review Meetings and Revisions** – Attend up to three (3) meetings with City staff, Visioning Committee and/or others to review and discuss the Community Outreach Summary Report. Make revisions to the Report based on comments received from the City.

**Deliverables:**

- Interview, focus group and workshop notes
- Survey questionnaire and report
- Web site
- Community Outreach Summary Report

**Part IV – Design**

- 4.1 Vision Statement** – Prepare a Draft Vision Statement for the City's future growth and development, distilled from the findings from the Existing Conditions Analysis and the Community Outreach.
- 4.2 Vision Plans, Illustrations** – Prepare graphics, including conceptual plans and sketches, to support and illustrate the Vision Statement. *The number and level of detail of the graphics will be based on the Cost Option selected by the City.*
- 4.3 Vision Action Plans (Core Drivers)** – Based on the Vision Statement, develop a Vision Action Plan for each of the core drivers. The Action Plan will contain strategies, including funding strategies that will provide guidance for implementing the elements of the Vision Statement. The Action Plan will also include recommendations for a process for the Commission to revisit the Vision Action Plan on a scheduled basis. Such a plan would include widely understood and agreed upon benchmarks and measurable performance indicators to use in monitoring vision implementation – including celebrating vision successes and making direction changes as new conditions and opportunities arise. Additional Action Plan elements could include action assignments (for vision implementation) and related timelines.

**Deliverables:**

- Draft, final Vision Statement
- Vision plans and illustrations
- Vision action plans





## Part V – Discussion

**5.1 Review Meetings and Revisions** – Conduct review meetings with City staff, Visioning Committee, City Commission and others (to be determined by the City) to review and discuss the Vision Statement, Vision Plans and Illustrations, and Action Plans. *The number of review meetings will be based on the Cost Option selected by the City.* Revise the Vision Statement and Action Plans as directed by the City.

### **Deliverables:**

- Review meeting minutes

**6.2 Executive Summary/ Poster** – Prepare a stand-alone color Executive Summary/ Poster to summarize the key findings, City-wide vision and actions from the Visioning Process (included in the Moderate and Comprehensive Cost Options).

**6.3 Revisions** – Revise the Final Report and Executive Summary/ Poster as directed by the City.

### **Deliverables:**

- Final Visioning Report
- Executive Summary/ Poster

## Part VI – Documentation

**6.1 Final Report** – Compile a Vision Report from the interim documents prepared during the Visioning process, including the Existing Conditions Report; Community Outreach Summary Report; Vision Statement; Vision Plans and Illustrations; and Vision Action Plans.



## years of experience

# 04

AECOM (formerly Glatting Jackson) has over thirty years of experience in conducting similar visioning services throughout Florida and the United States. Additionally, the personnel with the University of Florida have extensive experience in projects that involve significant public engagement at all community levels. Following is a selected list of similar projects, followed by project examples.

- Smart Growth North Miami Beach Visioning Process and Urban Design Plan
- Smart Charlotte 2050 Comprehensive Plan
- City of Largo Strategic Vision Plan
- Sarasota County 2050 Resource Management Area Plan
- Bluegrass Tomorrow, Kentucky Vision, Corridor Management Planning Handbook and Bluegrass by Design, a community design handbook
- Martin County Sustainable Community Vision Plan
- Downtown San Diego Needs Assessment for Parks and Open Space
- Highlands County Strategic Framework Vision Plan
- St. Lucie County Western Lands Study
- East Miramar Neighborhood Vision Plan
- 50 Year Miami-Dade County Open Space Master Plan
- Downtown Orlando Community Venues Master Plan
- City of Palm Beach Gardens Building Height Visioning workshops
- Town of LaBelle Vision Plan
- City of Lakeland Downtown Vision Plan
- Bay Harbor Islands Community Vision Plan
- Johnson City, Tennessee Land Use and Transportation Vision Plan
- City of Bradenton EAR and Comprehensive Plan Update
- Florida Public Officials Design Institutes (over 40 communities' participated from 2002-2009)
- Strategic Planning Workshops for the City of Boynton Beach Parks and Recreation Department
- City of Fellsmere Your Town Design Workshop for the National Endowment of the Arts
- Lauderdale, Lauderdale Lakes and Broward County Arts and Cultural Corridor Facilitation and Strategic Planning
- Martin County Strategic Planning Retreat
- Private Sector Financial Impediments to Redevelopment workshops (Miami-Dade, Broward & Palm Beach Counties)
- City of Wilton Manors, Visioning for Redevelopment
- City of Ft. Lauderdale Workshops to Develop Affordable Housing Strategies
- Intergovernmental Coordination Summit for Elected Officials, Tallahassee
- City of Miramar Strategic Planning
- City of Fort Lauderdale Comprehensive Planning Management and Staff Retreat
- City of Lake Worth Strategic Planning Retreat
- Martin County American Assembly on Education
- Pahokee Vision Setting American Assembly
- Florida Chapter American Planning Association Statewide American Assembly; Future of Florida--Land, Water, and Community
- Palm Beach County 2005 Economic Summit
- City of Fort Lauderdale Neighborhood Criteria Project
- City of West Palm Beach Mass and scale standards for historic neighborhoods
- Evaluation of the community charrettes convened by the University of Miami School of Architecture's Knight Program in Community Building
- Committee for a Sustainable Treasure Coast regional visioning project and related case study
- Jackson County, Florida award winning county-wide visioning project
- City of Lexington, Kentucky community legacy visioning project
- City of Lexington Kentucky design guidelines for neighborhood infill and redevelopment
- City of Lexington, Kentucky Newtown Pike Extension project that won recognition for showing how road plans can be developed within a community- and environmental justice-based planning framework
- Expert peer review panels for the Broward County Public School Amended Interlocal Agreement for Public School Facility Planning, the Sector Plan for the Central Western Communities, and the South Miami-Dade County Watershed; the Martin County Land Development Pattern Study; the Towns, Villages, and Countryside Plan for North St. Lucie County; and for the Miami Corporation, the Farmton Plan (a conservation design-based comprehensive plan amendment).

Studio Location: Orlando

## Bluegrass Corridor Management Planning Handbook

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin.*

Glatting Jackson prepared a corridor management planning handbook intended to serve as a single source of information for planners, developers, decision makers, and citizens interested in understanding the land use/ transportation planning link and the use of this link to affect desired development patterns that foster regional mobility and livability.

The handbook contains a prescriptive process for developing corridor specific management plans, and provides community leaders with a toolbox of implementation strategies, model land development regulations (LDRs), access management standards, intergovernmental coordination tools, context-sensitive design guidelines, and community involvement techniques.

In addition, the handbook offers visual examples, conceptual and real world, of successful conceptual corridor management plan implementation. The visual examples are also produced as an animated multi-media presentation for the CD-ROM version of the handbook.



Integrating transportation and land use policies to preserve unique Bluegrass character



Existing development in scenic corridor destroys scenic vistas

Studio Location: Orlando

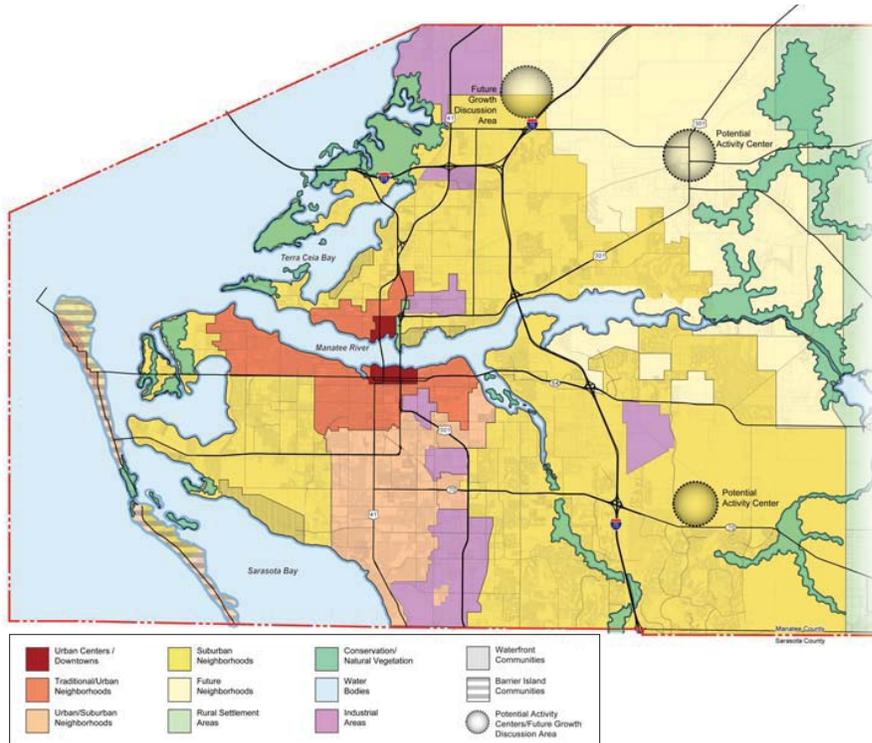
## Bradenton Evaluation and Appraisal Report and Comprehensive Plan Update

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.*

The City of Bradenton retained our services to prepare an Evaluation and Appraisal Report (EAR) for the City's Comprehensive Plan. Under state law, the City was required to evaluate the goals, objectives, and policies of the Comprehensive Plan. The purpose of the EAR was to determine what changes are needed in the plan to reflect the community's vision for the future, including what issues needed to be addressed to meet the expectations of its citizenry and what anticipated amendments/tools for evaluation could be used to address the issues raised by the community.

The outcome of the EAR Process was to 1) create a composite set of critical issues regarding growth management that the City will evaluate during an update and amendment to its Comprehensive Plan, 2) identify alternatives that the City will evaluate with regard to each of those issues and 3) evaluate the effectiveness of the City's current adopted Comprehensive Plan in achieving the City's established goals, objectives and policies.

The new requirements for the preparation of the EAR call for the report to be focused on responding to specific issues of local concern that are developed through an interactive community-based process. As part of the process, a Comprehensive Plan Review Committee (CPRC) was established to review and make



recommendations on the EAR. The CPRC was the primary forum for public input and development of the City of Bradenton's EAR. The CPRC consisted of an ad hoc committee of community stakeholders and provided representation from each Planning District in the City. The CPRC participated in the review of the Comprehensive Plan and provided review comments, concepts and recommendations for the EAR. The CPRC helped to identify major issues for the community, review the draft EAR, and provide recommendations on the final EAR document.

Subsequent to approval of the EAR, the City retained Glatting Jackson to develop the EAR-based Amendments which were unanimously adopted by the City Commission and transmitted to the Florida Department of Community Affairs in August of 2008.



## Smart Charlotte 2050 - Update to the Comprehensive Plan



These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.

Glatting Jackson was retained by Charlotte County to update the County's Comprehensive Plan through an extensive community based planning effort. The plan, entitled "Smart Charlotte 2050," includes an interactive, web-based component for citizens to participate, a series of public workshops, and a design charrette to develop a vision for the County's future. The vision will then be translated to new Goals, Objectives, and Policies that address land-use and growth management, economic development, capital improvements and design. The new Comprehensive Plan will be housed in a "first of its kind", digitally interactive, database software package.

Smart Charlotte 2050 includes the following innovative planning tools for the County:

**Planning Framework.** The final Planning Framework will include a graphically presented guide for Charlotte County's growth and development based upon community consensus in Charlotte County and specific planning principles to guide this development.

**Comprehensive Plan Update.** The new plan will help guide all future planning and development decisions. Guiding Principles will be used to create a set of policies to implement this Framework and a 2050 Future Land Use Map. Smart Charlotte 2050 policies will be based upon the sustainability concepts of Smart Growth.

**Interactive Web-based Planning Tool.** The interactive planning website (www.

SmartCharlotte2050.com) serves as a fundamental tool for community involvement and is designed to grow over time to provide a completely interactive experience that allows citizens to participate in long-range planning with a level of access and information that has not been available before. The power of this collaborative, interactive planning tool is that the County can engage its citizenry in the planning process long before there is a development application in front of the County Commission.

**Project size:** 859 mi<sup>2</sup>  
**Cost:** \$394,999  
**Awards:** Florida Planning and Zoning Association 2009 Outstanding Long-Range Study.

## Coleman Park Neighborhood Improvements Plan

*These services were provided by AECOM professionals during their employment with Glattig Jackson Kercher Anglin, Inc.*

Coleman Park is the historic center of the City of West Palm Beach's African-American community; a neighborhood rich in history, but has experienced considerable setbacks in safety, appearance, and social stability. The planning process involved residents, business owners, property owners and other stakeholders to provide input regarding their vision for the neighborhood, and how to attain that vision. Two categories of recommended improvements resulted from this process:

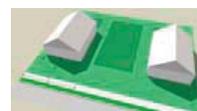
**Programmatic Improvements** address basic needs such as safety, jobs, housing, appearance and education.

**Physical Improvements** address higher level needs such as streetscapes, commercial redevelopment and parks and recreation enhancements.

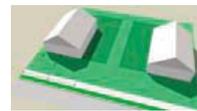
The final plan includes implementation strategies and recommendations that the City is using to apply for grants and plan future public investment to address needs in the following areas:

Safety • Employment • Appearance • Education • Community Involvement • Transportation • Housing • Streets and Sidewalks • Commercial Redevelopment • Institutions • Parks, Recreation and Open Space

**Contact:** John Roach, Senior Planner  
**Address:** 401 Clematis Street, WPB, FL 33401  
**Telephone:** (561) 659-8031  
**Project Manager:** David L. Barth, ASLA, AICP  
**Year Completed:** 2009  
**Total Cost:** \$75,000



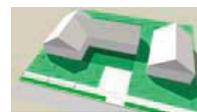
Existing vacant lot



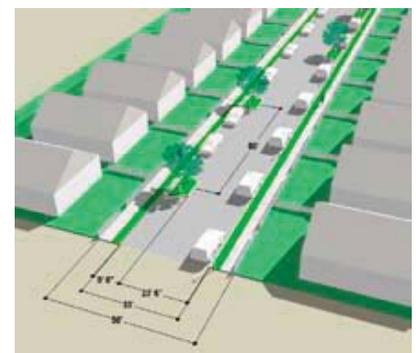
Vacant lot split between adjoining lots



Vacant lot joined with adjoining lot



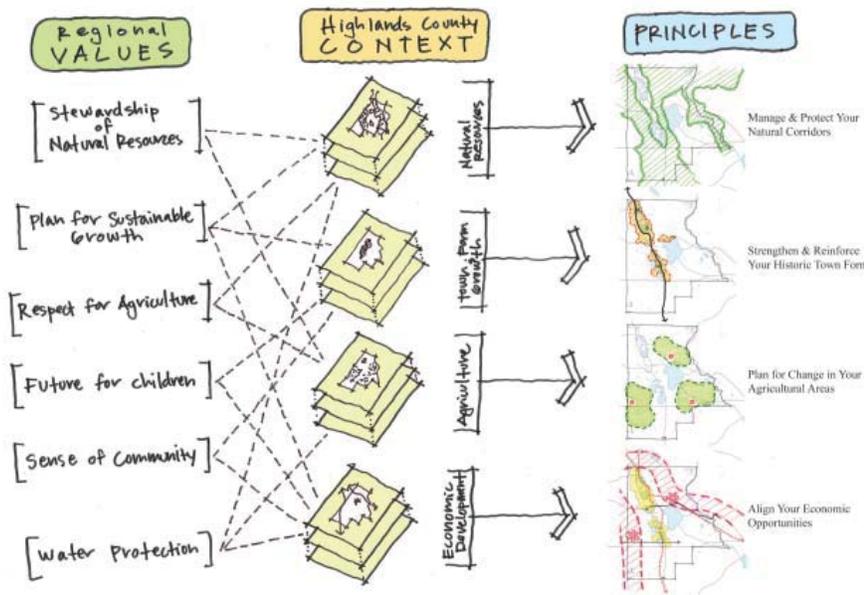
Potential accessory dwelling addition



Tree islands added to provide shade and help tame through-traffic on neighborhood streets

"Lot next door" proposal to merge vacant lots with neighboring owner-occupied homes, with the potential to add Accessory Dwelling Units within the neighborhood in the future

## Highlands County Strategic Framework Plan



These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.

Highlands County, located in the agricultural heartland of central Florida, retained Glatting Jackson to assist the County in creating a Long-Range Strategic Growth Management Plan, with the first phase functioning as a Strategic Framework Plan. The Strategic Framework was constructed around four Framework Principles including Natural Resources, Town Form, Agricultural Areas, and Economic Development. Extensive data gathering and analyses were conducted to understand the historical and existing context, both locally and regionally, of the four Framework Principles for the County. The potential effects and influences on future growth options were discussed for each framework principle as well.

The product of these initial efforts was a framework map illustrating the spatial forms of the Framework Principles and context maps.

Through public workshops, stakeholder interviews, and meetings with County staff, a set of implementation strategies were created for each of the Framework Principles. These implementation strategies included potential Comprehensive Plan amendments and performance standards for development review.

Following the construction of the Framework Principles and implementation strategies, three potential long-term development scenarios were produced including New Towns, Town and Village, and Villages Scenarios, all three of which were guided by the Framework Principles. The scenarios show how the Framework Principles can be

applied to any number of desired outcomes and future conditions to create a more sustainable Highlands County. Finally, a series of next steps was prepared illustrating how the Strategic Framework Plan should be integrated with current and future planning efforts within the County.

AECOM

Design + Planning  
Public Planning  
Urban Design  
Economic Development

Lakeland, Florida  
Client : Lakeland Downtown  
Development Authority

Studio Location: Orlando

## Lakeland Downtown CRA Vision Plan

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin.*

Glatting was retained by the City of Lakeland to assist in an update to the Downtown Lakeland Community Redevelopment Agency (CRA) Vision Plan. Tasks for this effort included the facilitation of public involvement efforts and the production of a Strategic Direction Plan, a document containing a comprehensive set of recommendations that would serve as the basis for the Vision Plan update.

Glatting Jackson facilitated several rounds of stakeholder interviews and public workshops. Based on the findings of these interviews and workshops, a variety of sub area design plans for “districts” within the CRA boundary were produced. The Strategic Direction Plan included a set of comprehensive recommendations for the City in the areas of urban design, infrastructure, economic development and governance.

Glatting Jackson’s efforts sought to advance the vision: “Downtown Lakeland is a regional career center with a vibrant mix of high quality residential, retail, professional, civic and entertainment activities within a continuously enhanced urban and historic setting.” The recommendations included in the Strategic Direction Plan were designed to leverage the City’s charm and vast infrastructure investments, including parks and streetscapes, to promote residential development and more activity generating uses in Downtown.



Downtown CRA Boundary with identified Sub-areas



North Downtown - Oak and Kentucky



Conceptual Rendering



## Miami-Dade County Parks and Open Space System Master Plan

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.*

Miami-Dade County Parks and Open Space System is composed of parks and public spaces, recreation facilities, greenways, blueways, great streets and conservation lands.

The Parks and Open Space Vision Plan is planned and created with an eye to its impact on the neighborhood, city, county and region as a whole; it must be effective, efficient, fair and balanced; must share responsibility with other public and private agencies; and must enhance health, happiness and well-being.

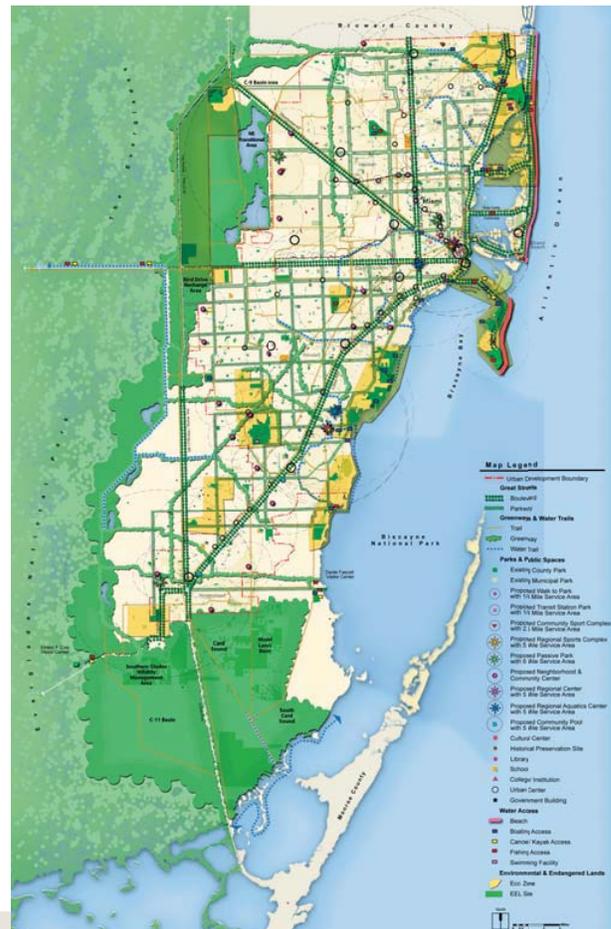
The new model Parks and Open Space system is an integral part of attaining social, environmental and economic sustainability; it must seek to be an integral part of the everyday human experience; it must be connected spiritually, physically and jurisdictionally and must provide access so that people can travel from park to park with a sense of belonging and safety. The model Park System must raise the standards of living for the region and inspire generations of people to care and contribute to their communities.

This Model Park System shall:

- Ensure an accessible, diverse and balanced system of passive and active recreation opportunities that promote health and well-being.
- Ensure the preservation, protection, enhancement of ecological resources to ensure biodiversity, integrity and the health of the region.
- Ensure the preservation, protection and enhancement of cultural landscapes and their historical and heritage features.
- Ensure that parks, recreation and conservation open spaces guide the growth of urban form.
- Ensure that there is no net loss of parks, recreation or conservation lands and mandate replacement of land of equal ecological value, context and significance.
- Ensure community stewardship of parks, recreation and conservation open spaces by fostering educational programming, civic art, volunteerism and support of philanthropic and grassroots organizations.
- Ensure the continual enhancement of economic development and quality of life in the region by partnering and collaborating with businesses and organizations to enhance services for residents and visitors.
- Ensure the equitable distribution of parks, recreation

and conservation open spaces for all communities in the region.

- Ensure the support of infill development within existing urban areas to conserve environmental resources, promote economic investment and support the social fabric, while reclaiming marginal and abandoned areas.
- Ensure the support and development of an interconnected framework of transportation alternatives such as transit, pedestrian, bicycle and waterway systems to link parks, recreation and conservation open spaces to each other and to communities.
- Ensure economic, social and environmental sustainability of the region by upholding high standards of design excellence, innovation and beauty.



Studio Location: Orlando

## Miramar Neighborhood Redevelopment Masterplan

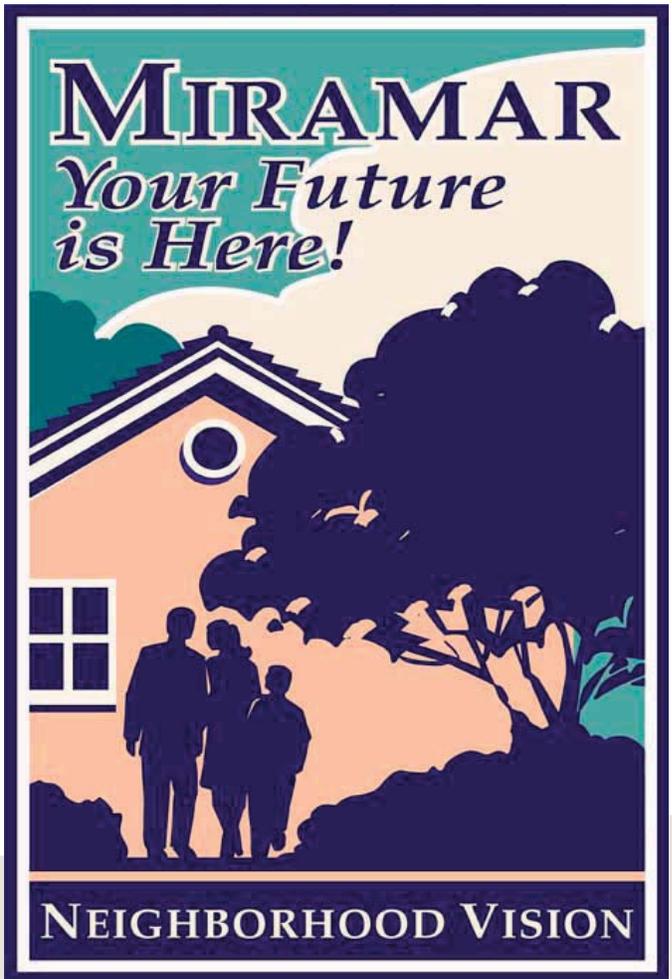
*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.*

Miramar is a physically and socially diverse community on the southern border of Broward County. The development forms of Miramar's neighborhoods range from traditional patterns of the 50's along the eastern borders, to gated suburban PUDs in the westerly reaches of the city.

Glatting Jackson is assisting the City of Miramar to develop an integrated series of strategic redevelopment plans for seven study areas that encompass the forty-one neighborhoods throughout the municipality.

For the first phase of this project, Glatting Jackson worked with the city to identify a future vision for the redevelopment of Miramar's neighborhoods. This neighborhood vision served as the framework for the preparation of a set of products, including a description of design principles and illustrative concept plans for a series of citywide projects that would create inter-neighborhood connections, community identity, and contribute to neighborhood livability.

These projects included a citywide gateway and wayfinding program, an integrated pedestrian/bicycle/vehicular circulation system, the creation of mixed-use city centers, critical roadway connections and extensions, the development of a neighborhood parks system that provides for a recreation facility within a quarter mile of all residents, a focused street tree program, the enhancement of the primary eastwest transportation corridor, and the transformation of this roadway into the "Grande Boulevard" of the city.



AECOM

**Design + Planning**  
 Landscape Architecture + Urban Design  
 Park Planning and Design  
 Transportation Planning

Studio Location: West Palm Beach,  
 Orlando

Completed: 2007

North Miami Beach, FL  
 Client: City of North Miami Beach



Cost: \$199,300

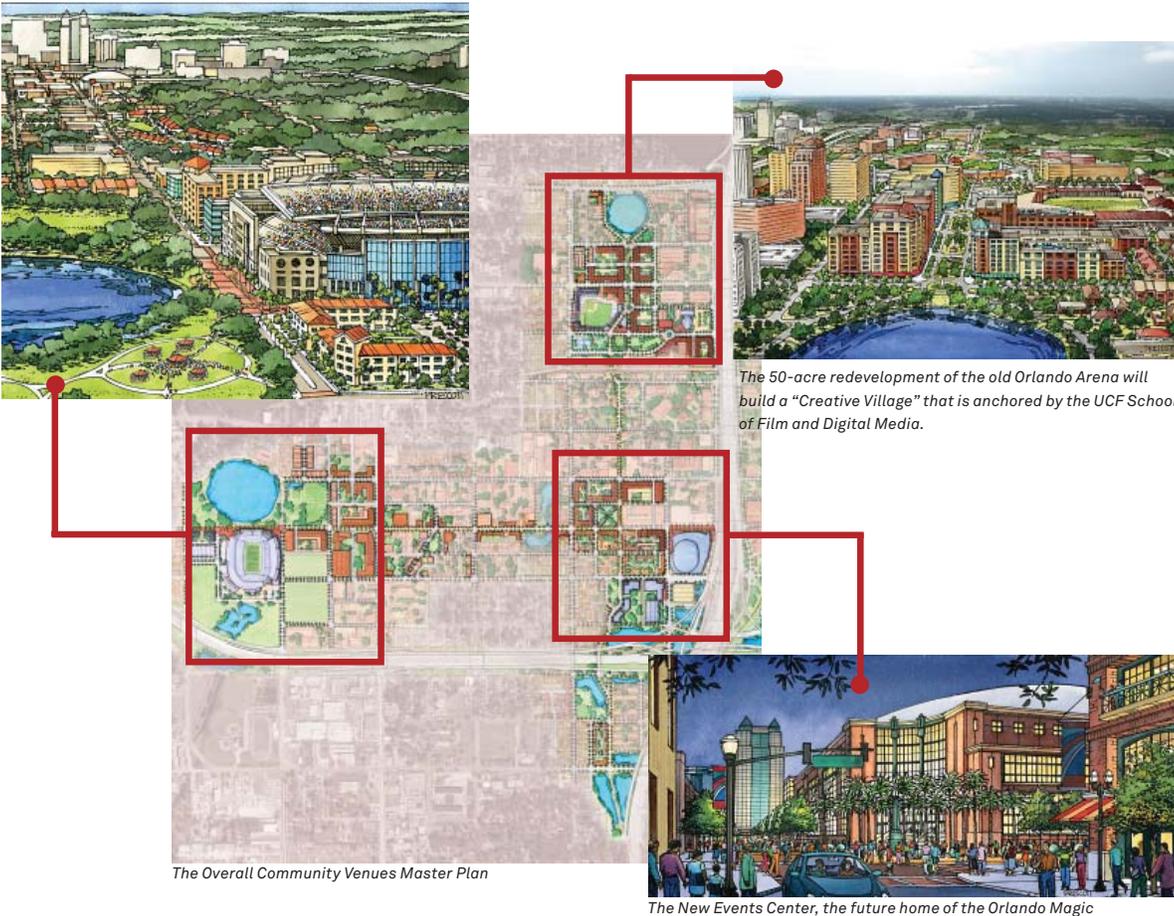
## North Miami Beach Urban Design Plan

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.*

Located in northern Dade County, the City of North Miami Beach is a major crossroads of South Florida. Because of this dynamic geography the City has grown beyond its roots as a bedroom community yet still lacks some of the desirable characteristics of a “real city.” Glatting Jackson created an Urban Design Plan as a unified vision of what North Miami Beach will look like in the future: a livable, green city with a tangible sense of place. The plan addresses the major issues of traffic congestion and a lack of identity primarily through three approaches: enhancement of the parks and open space system; a land use-based transportation strategy, and a vision for future land use. Highlights of the plan include the transformation of the Snake Creek Canal into an urban “Grand Canal” promenade; the guidance of new growth towards existing infrastructure; the provision transportation routing options to increase connectivity; the creation of a system of green streets and greenways; and the enhancement of public spaces to create a culture of caring.

Studio Location: Orlando

# Downtown Orlando Community Venues Masterplan



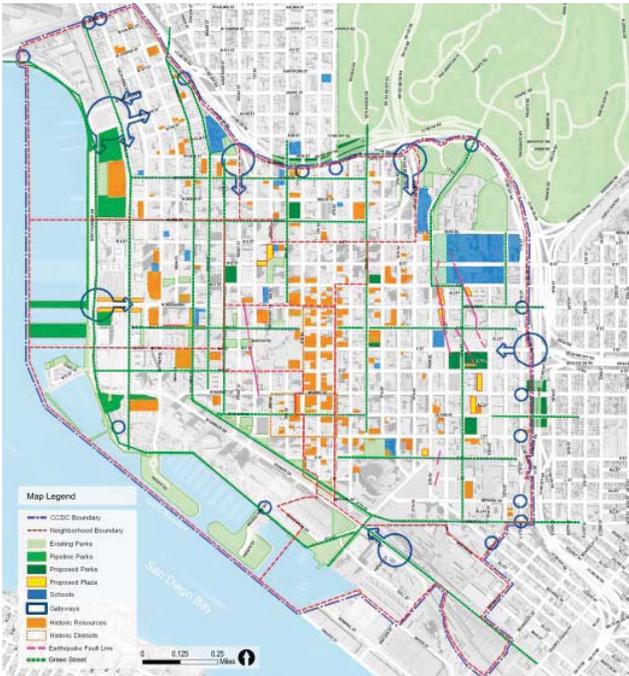
*These services were provided by AECOM professionals during their employment with Glattig Jackson Kercher Anglin, Inc.*

We were retained by the City of Orlando to lead the Community Venues Master Plan, a massive urban design effort that is reshaping Downtown Orlando. The Master Plan is guiding a \$1.2 billion dollar public initiative aimed at building a new Performing Arts Center, a new Events Center, and improvements to the Florida Citrus bowl.

The Community Venues Master Plan tied all of the individual community venues' efforts together and develop a vision plan that will maximize the potential benefit of each of these facilities, capitalizing on the synergistic relationships they may bring to the Downtown community, Orange County and the entire Central Florida Region. The master plan also examined the redevelopment potential of the Orlando Centroplex, the creation of a "Creative Village", and a possible

location for a Downtown Minor League Baseball Stadium. Finally, the Master Plan looked at the West Church Street corridor, tying the community venues and the redevelopment efforts together with the Church Street streetscape project.

AECOM is assisting with the detail design and implementation of several aspects of the plan, including new downtown events center/Church Street streetscape.



## Downtown San Diego Parks and Recreation Needs Assessment

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin, Inc.*

Open Space, Parks and Recreation Needs Assessment for downtown San Diego for the Centre City Development Corporation (CCDC). The City has undergone tremendous growth and redevelopment over the past 10 years, but Parks and Open Spaces have not kept pace with new development. Needs assessment techniques included an analysis of the existing system; evaluation of both existing and projected demographics; interviews and workshops with various stakeholders and focus groups; public workshops; and a mail/telephone survey. Intercept surveys were also conducted with downtown park users, visitors, residents and office workers. The Needs Assessment findings formed the basis of park “development programs” for both existing and proposed parks, as well as for the overall downtown Open Space, Parks and Recreation Masterplan.





## Port Everglades Master Planning Design and Plan Implementation

As prime consultant, AECOM prepared a master plan to guide port development over the next 20 years. Working closely with the Port staff, the study involved: updating the market forecast, performing detailed conceptual planning/design studies, conducting visioning exercises, doing public outreach, completing facility capacity studies for the terminals and berthing areas, planning circulation, designing the intermodal rail yard, evaluating flight path restrictions from an adjacent international airport, identifying methods to increase terminal efficiencies, evaluating financial development options, performing navigation studies, planning infrastructure and relocation assistance, analyzing the parking garage, planning security, conducting phasing and capital improvement plans, and performing other associated studies.

AECOM managing Port's \$200 million expansion program involving feasibility studies, planning, design and services during construction for the implementation of the Port Everglades Master Plan. Project elements include a new container terminal, Ro-Ro terminal, intermodal container transfer facility, turning notch, cruise terminal expansion, improvements to the internal roadway and railway network, and a consolidated structured parking facility linking major cruise terminals.

AECOM also reviewed and analysed the port entrance channel dredging and widening alternatives developed by the U.S. Army Corps of Engineers and reviewed National Economic Development benefits analysis and simulation model methodology, and identified gaps between the Port Master Plan and USACOE methodology. AECOM also performed peer review of calculations to obtain capacity of bulk heads in as-is condition and post dredging program.



Studio Location: Orlando

## Boynton Beach Recreation and Parks Master Plan

*These services were provided by AECOM professionals during their employment with Glatting Jackson Kercher Anglin.*

In 2001, the City's Recreation and Parks Department commissioned a Needs Assessment to determine recreation interests, facility usage, and opinions of the City's system of parks and facilities. In July 2004, Glatting Jackson was hired to solicit public input regarding the city's parks, recreation facilities and programs; to analyze the existing System; to prepare a Conceptual Parks and Recreation System Vision (Map); and to revise the City's Comprehensive Plan. The City of Boynton Beach recognizes that the City's Parks and Open Space System is an integral part of establishing and sustaining a high quality of life for residents and visitors, while also protecting and enhancing the City's unique image.

The Vision was refined through a series of meetings with City staff, Senior Advisory Board, Recreation and Parks Board, and the general public. Recreation and Parks staff analyzed the current and future needs for additional staff and operating resources, and established desired Levels of Service (LOS) for park land and facilities. Both capital and operations/maintenance costs were estimated, and potential funding sources and implementation strategies were identified.

**Project Cost :** \$60,000



### CITY OF BOYNTON BEACH Conceptual Parks and Recreation System Map



# 05

## management team

Our team will be led by **David Barth, AICP, ASLA; Marie York, FAICP; Jean Scott, AICP; Ann Marie Sorrell; and Frances Chandler Marino, AICP.**





# We plan and design livable communities

The professionals of Glatting Jackson are now part of AECOM Design + Planning. Founded in 1974, Glatting Jackson's focus has been to plan and design livable communities. The firm's landscape architects, ecologists, planners, urban designers, wayfinding artists and transportation professionals have assisted public and private clients create places that are healthier, more vibrant, better connected and more sustainable.

The 90-plus professionals from Glatting Jackson who joined AECOM in December 2009 have found a natural fit, as AECOM's purpose is to enhance and sustain the world's built, social and natural environments. Further, AECOM was founded upon a commitment to socially and environmentally responsible design and planning. The alignment of our Orlando, Atlanta, South Florida and Denver offices with those of legacy EDAW has created a dynamic Design+Planning practice with uniquely coordinated resources available in the Southeast United States and a strong national presence.

AECOM is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. The company was founded in 1990 with the merger of six separate companies, including several with distinguished histories dating back to the early 1900s. Since then, AECOM has been joined by the talent of more than 30 companies. The firm's technical expertise

and creative excellence stems from this rich history of some of the world's finest engineering, environmental, planning and design companies. AECOM (NYSE: ACM) became a publicly traded company in 2007.

As part of AECOM Design + Planning, we continue to provide the same excellent service our clients received for decades from Glatting Jackson. Also, we are now able to offer additional services through our new partnerships with other AECOM professionals, including economists, engineers, architects and geographers. We create exemplary environments through healthy, beautiful and sustainable:

- Corridors and Streetscapes
- Neighborhoods
- Campus
- Community Waterfronts
- Parks Systems Plans
- Tourism and Hospitality
- Large City Planning
- Regional Resource Plans
- New Communities

Our services include:

- Master Planning and Land Planning
- Redevelopment Planning
- Transportation Planning
- Urban Design
- Landscape Architecture
- Environmental Sciences
- Parks and Open Space Planning
- Land Use/Entitlements
- Resorts and Hospitality

## Organizational Chart

# City of Fort Lauderdale

### PROJECT LEADERSHIP

**David L. Barth, AICP, ALSA, CPRP**  
Principal-in-Charge  
AECOM

**Jean Scott**  
Assistant Project Manager/Facilitator  
Strategies for Livable Communities/SLC, LLC

### Visioning Team

#### AECOM

Frances Chandler-Marino  
*Lead Evaluator*

Jay Exum, Ph.D  
*Principal Ecologist*

Brent Lacy, AICP  
*Transportation Planner*

Mike Sobczak, ASLA  
*Urban Designer*

Blake Drury, AICP  
*Urban Designer*

Jonathan Mugmon, SEGD  
*Wayfinding & Environmental Graphics*

Ryan Cambridge  
*Landscape Designer*

#### York Solutions, LLC

Marie L. York, FAICP  
*Planner, Lead Project Facilitator*

#### The Mosaic Group

Ann Marie Sorrell, MBA  
*Outreach Coordinator*

#### University of Florida Center for Building Better Communities

Claude E. (Gene) Boles, Jr., FAICP, CNU  
*Senior Fellow*

## David L. Barth, AICP, ASLA, CPRP | Principal, AECOM

### Role: Principal-in-Charge



David Barth will serve as the Principal-in-Charge and Project Manager for the project. Dave specializes in community outreach, visioning and master planning as tools for livable, sustainable communities. He has been involved in over 100 community visioning projects throughout Florida and the United States, ranging from the SmartGrowth Visioning Workshops and Urban Design Plan for North Miami Beach, FL, to the Open Space Needs Assessment for Downtown San Diego, CA and the Comprehensive Vision and Master Plan for the Poarch Band of the Creek Indians in Atmore, Alabama. He has pioneered a variety of techniques to reach under-represented constituencies who may not participate in conventional public planning projects, including seniors, youth and ethnic minorities. Dave is known for his ability to listen to the community; to facilitate engaging, interactive and productive visioning processes; and to synthesize complex data and community input into compelling initiatives and actions.

## Jean Scott | Owner, Strategies for Livable Communities/SLC, LLC

### Role: Assistant Project Manager & Project Planner



Jean Scott will serve as the Assistant Project Manager and Project Planner. She is a Senior Fellow with the University of Florida's Center for Building Better Communities and the Managing Member of SLC, LLC. Jean brings 30-plus years of applied experience in experience in building and sustaining collaborative and inclusive partnerships among diverse interests, synthesizing complex planning issues into language that is easy to understand and as a part of public and private planning process, custom-tailoring outreach and communication strategies to effectively reach and engage target population groups. She also brings the unique perspective of someone who has worked at the local, state and federal levels of government and directed a civic-citizen-based organization that focused on regional and community planning and has managed numerous complex planning, visioning and community involvement projects. In addition, through

her work on The Florida Planning Toolbox and numerous technical and peer review panels, she brings a thorough understanding of the range of planning tools needed to develop and implement a holistic vision plan that will guide City policy and decision-making over the long-term. Until 2000, Scott served as President of Bluegrass Tomorrow, a regional civic leadership organization that received national recognition for its successful work in shaping consensus-based growth and resource management decisions for the seven-county central Bluegrass Region of Kentucky.

## Marie L. York, FAICP | President, York Solutions, LLC

### Role: Lead Project Facilitator



Marie York will work with Dave as a Lead Project Facilitator. Marie is a Senior Fellow with the University of Florida's Center for Building Better Communities and the President of York Solutions LLC, as well as a certified Life Coach. The latter certification is particularly relevant for her public facilitation and work in community outreach, providing a facet of understanding beyond that of professional planner and facilitator. She also is a Fellow of the University of Miami's Knight Program in Community Building and was trained by the Florida Conflict Resolution Consortium. As a board director of the American Planning Association, she has benefited from its leadership training and development and training in public outreach. With 25 plus years of planning, facilitation and teaching experience, she has led over 60 projects in comprehensive planning, community building, economic development, sustainability, urban design, cultural arts planning, transportation and

affordable housing. Much of this work has involved public participation and facilitation from small neighborhood groups to large gatherings such as American Assemblies, including a statewide Assembly on growth management held in Tampa and most recently, for St. Lucie County's Western Lands Study. In 1995 she was a writer of the Policy Statement for Ft. Lauderdale's Assembly. Previously, in 1987 she organized a Comprehensive Management and Staff Retreat for the City and directed and contributed to the final State of the City Report. In 1998 she facilitated Ft. Lauderdale's efforts in establishing an Affordable Housing Incentive Ordinance. Formerly, as Associate Director of Florida Atlantic University's Center for Urban & Environmental Solutions, she co-founded and then directed the award-winning Florida Public Officials Design Institute at Abacoa, inspiring and teaching elected officials to build sustainable places. She is a Director and Corporate Officer of the 41,000 member American Planning Association (APA) and she chairs the national jury awards for APA. She is a former member of ULI's Southeast Florida/Caribbean District executive committee, Leadership Florida's Advisory Committee, APA Florida's President, and Chair of APA's New Urbanism Division. In 2008 APA bestowed upon her it highest award, that of Fellow of the American Institute of Certified Planners.

## Ann Marie Sorrell, MBA | President & CEO, The Mosaic Group

**Role: Outreach Coordinator**



Ann Marie Sorrell will serve as the Outreach Coordinator for the project. Ann Marie is the President and CEO of The Mosaic Group, a full service marketing, public relations and event management firm that has conducted public outreach for private, government and non-profit organizations such as the City of West Palm Beach, the Florida Department of Environmental Protection, the South Florida Water Management District and Big Brothers Big Sisters. Ann Marie received a BS degree in Healthcare Management from Florida A& M University and a MBA from Nova Southeastern University and is an adjunct professor at Palm Beach State College where she teaches Small Business Management and Human Relations. She has held leadership positions as a volunteer with the Urban League of Palm Beach County (she has served as both the Young Professionals and Guild Auxiliary President), co-chaired several committees with the Black Chamber of Commerce, currently serves as a Board member for Girls II Women, committee member for the Executive Women of the Palm Beaches membership Committee, and is a member of Delta Sigma Theta Sorority, Inc. Ann Marie also volunteers her time speaking to students about building positive relationships and entrepreneurship throughout Palm Beach County through programs like Girl Power, The Girls Leadership Institute, and Turning Point Academy to name a few. Ann Marie recently received the 2010 South Florida Business Leader Women Extraordinaire Award and was recognized by Success South Florida Magazine as one of the Top Leaders under 40.

## Frances Chandler-Marino | Principal, AECOM

**Role: Lead Evaluator**



Frances Chandler Marino, AICP will lead the evaluation of the City's Core Drivers, directing the work of technical experts from AECOM and the University of Florida. Frances Chandler-Marino has over twenty years of experience in local government comprehensive planning and land development regulation. Since joining Glatting Jackson in July 2001 as the Director of Regional Planning and with AECOM in 2009, she has had the opportunity to work with numerous Florida local governments to create specific planning strategies and land development regulations to address their planning priorities. Her expertise of specialty-planning services includes Comprehensive Plans, Land Development Regulations and Special Area Studies that are designed to support community goals, preserve residential lifestyle choices and create and enhance economic development and redevelopment opportunities. Frances served on a 17-member EAR technical advisory committee that was appointed by the Florida Department of Community Affairs staff on July 15, 2004 to review the EAR process and prepare a final report to the Governor, the Administration Commission, the Speaker of the House, the Senate President and the respective community affairs legislative committees. The purpose of the technical advisory committee was to evaluate the effectiveness of the EAR process and make recommendations to improve the process. The committee's final report was submitted on December 23, 2004.

Other technical experts include **Nancy Roberts, Brent Lacy, Mike Sobczak, Jay Exum, Jonathan Mugmon, Blake Drury, Ryan Cambridge, Lisa Baer and Gene Boles**. Following are resumes of both the Management and the Technical Teams for the project.



**David L. Barth, ASLA, AICP, CPRP**  
Principal

**Education**

Masters of Organizational Leadership, Palm Beach Atlantic University (2003)

Bachelor of Landscape Architecture, University of Florida, (1978)

**Professional Registration**

Registered Landscape Architect, Florida #528 (1979)

**Accreditations**

American Institute of Certified Planners, #011226 (1995)

Certified Parks and Recreation Professional (2002)

**Affiliations**

- American Society of Landscape Architects
- American Planning Association
- National/ Florida Recreation and Parks Associations
- Florida Public Officials Design Institute
- South Florida Environmental Art Project

**Awards and Honors**

- Award of Honor, Northeast Everglades Natural Area Master Plan, Florida Chapter ASLA, 2006
- Award of Merit, City of Homestead Parks and Recreation Master Plan, Florida Chapter ASLA 2005
- Outstanding Graduate Award, Palm Beach Atlantic University, 2003
- Award of Honor, Indian Riverside Park, Florida Chapter ASLA, 2002
- Landscape Architect of the Year, Palm Beach County Chapter AIA, 2001
- Award of Excellence, West Orange Trail, Florida Chapter ASLA, 1996
- Award of Excellence, Cypress Grove Park, Florida Chapter ASLA, 1994
- Community Service Award, Florida Chapter ASLA, 1994

**Publications + Technical Papers**

- Providing Equity for Parks and Recreation Facilities; Alternatives for Calculating Level of Service, FRPA Journal, 2009
- Strategies and Tools for Parks and Open Space Planning and Decision Making: Does My Community Need More Parks? APA Planning Advisory Service, 2008
- Planning and Urban Design Standards: Conducting a Parks and Recreation Needs Assessment, APA, 2005
- Developing an Effective Parks and Recreation System, FRPA Journal, 1998
- Generating Revenues on Conservation Lands; Can They Pay Their Own Way? Florida Recreation and Park News, 1992
- Developing an Ecotourism Program, Glatting Jackson, 1988

**Recent Presentations (2009 | 2010)**

Harnessing the Power of the Public Realm to Create More Sustainable Communities, West Palm Beach Sustainability Committee, 2010

10 Principles for Successful Community Visioning and Implementation, Florida Association of Counties, 2009

Greening Your Town Through the Public Realm, South Florida Green Energy & Climate Conference, 2009

Alternatives for Calculating Level of Service for Parks and Recreation, NC/ SC Recreation and Parks Associations, 2009

Sustainability, Leadership and the Role of Parks and Recreation Professionals, FRPA Directors Summit, 2009

Effective Techniques for Public Participation, Needs Assessments and Consensus-Building, FRPA, 2009

Repositioning Parks and Recreation Departments to become an Essential Service, NRPA, 2009

**Professional History**

2009 - Present, Principal-in-Charge of West Palm Beach Office, Design + Planning at AECOM  
 1998 - 2009, Principal-in-Charge of West Palm Beach Office, Glatting Jackson Kercher Anglin, Inc  
 1987 - 1998, Director of Parks and Open Space Planning, Glatting Jackson Kercher Anglin, Inc., Orlando, FL  
 1986 - 1987, Director of Planning and Landscape Architecture, BJM Associates, Inc., Orlando, FL  
 1982 - 1986, Assistant Regional Planning Manager, Post Buckley Schuh & Jernigan, Inc., Orlando, FL  
 1980 - 1982, Landscape Architect/Planner, Glenn Acomb Assoc. /Boyle Engineering Corp., Orlando, FL  
 1980 - 1981, Associate Land Planner, ITT Community Development Corp., Palm Coast, FL  
 1978 - 1979, Landscape Architect, Harry Weese & Associates, Kaiser Transit Group, Miami, FL

David Barth specializes in community visioning and strategic planning to create more sustainable communities. He has been a leading national advocate for “harnessing the power of the public realm to create more economically, socially and environmentally sustainable communities. Dave has over thirty years of experience working at all scales of community planning and design, from regional visioning to detailed design and construction. He regularly lectures and writes regarding sustainability, visioning, needs assessments, levels of service and other topics dealing with sustainable communities and the public realm.

## Selected Projects – Visioning, Sustainability Planning

### **Strategic Master Plan, Poarch Band of the Creek Indians, Atmore, AL**

Public Involvement Coordinator and Recreation/ Resource Planner for the Strategic Master Plan for the Poarch Band of the Creek Indians, involving approximately 7,600 acres currently held by the Tribe in and around the areas of Atmore and Poarch, Alabama. The Master Plan will include long range visions and implementation strategies to help Tribal members and leaders address the key sustainability issues facing the community today and in the future, including land development, natural resource management, education, health care, preservation, economic development, infrastructure and community services.

### **Fort Lauderdale Parks & Long Range Strategic Plan**

Principal-in-Charge for the Long Range Strategic Plan for the City of Fort Lauderdale Park and Recreation System. Key components of the plan include: an Inventory and Assessment of the existing system, community involvement, comparative analysis, and a long range strategic plan document.

### **Smart Growth Workshops, Urban Design Plan, North Miami Beach, FL**

Principal-in-Charge of a “Smart Growth” and Urban Design Plan for the City of North Miami Beach, a built-out community that is experiencing its second wave of growth. Sustainability issues include traffic congestion, affordable housing, public open space, brownfields sites, changing demographics and high density redevelopment. The community is divided over issues such as height and density. The purpose of the Smart Growth/ Urban Design Planning Process was to create a unified vision of what North Miami Beach will look like in the future: a livable, green city with a tangible sense of place. The plan addresses the major issues of traffic congestion and a lack of identity primarily through three approaches: enhancement of the parks and open space system; a land use-based transportation strategy, and a vision for future land use. Highlights of the plan include the transformation of the Snake Creek Canal into an urban “Grand Canal” promenade; the guidance of new growth towards existing infrastructure; the provision transportation routing options to increase connectivity; the creation of a system of green streets and greenways; and the enhancement of public spaces to create a culture of caring.

### **Coleman Park Neighborhood Improvements Plan, West Palm Beach, FL**

Principal-in-Charge of the Coleman Park Neighborhood Improvements Plan. Coleman park is an economically depressed and neglected neighborhood directly north of downtown West Palm Beach, suffering from a high crime rate, low employment and extreme poverty. The planning process included extensive interviews and workshops with residents, kids, City staff (including police), elected officials, neighborhood associations, business leaders, the project steering committee and also other stakeholders. It also included a “walking audit” of the neighborhood with over fifty residents and elected officials. The outcome of the planning process was a vision, recommendations and actions that the neighborhood and City should take to stabilize the neighborhood and create a framework for a more livable and prosperous future.

### **Broward County Greenways Master Plan**

Principal-in-Charge for the Broward County Greenways Master Plan, to create a countywide vision for Greenways and Trails by identifying priority corridors for development and determining implementation costs of the overall system. In addition created master plans for the top priority corridors and determined implementation costs for each corridor. The development of the Countywide Master Plan, as well as each of the top priority corridors required extensive public participation, including Broward County elected officials, elected officials from various Broward County municipalities, County and City staff and residents.

### **Martin County Sustainable Communities Vision, FL**

Project Manager and Principal-in-Charge for a county-wide visioning process to develop a consensus based vision for a sustainable Martin County. Coordinated a visioning process with a project steering committee, county commissioners, and a staff and planning team, resulting in a draft “vision plan”, preliminary “guiding principles”, and indicators for sustainability. The plan and principles were then presented at seven public workshops throughout the County for review and comment. Findings and recommendations for the Plan were incorporated into an Indicators Program, as well as into the County’s Comprehensive Plan.

### **Parks and Open Space Master Plan, Miami-Dade County, FL**

Principal-in-Charge of “A 50 Year, Unifying Vision for a Livable, Sustainable Miami-Dade County - Through the Parks Window”. The intent of the plan is to create a new

development “culture” in Miami-Dade County that focuses on the principles of equity, accessibility, seamlessness, sustainability, beauty and the generation of multiple benefits. The five (5) elements of the plan included great parks; great public spaces; great natural and cultural areas; great greenways and blueways; and great streets. The planning process included a lifestyle/demographics analysis; analysis of the existing system; neighborhood, community and county-wide vision plans; benchmarking and economic analysis; public involvement; and the development of a comprehensive, integrated County wide Open Space vision.

#### **San Diego, CA Downtown Parks and Recreation Needs Assessment**

Principal-in-Charge for the Open Space, Parks and Recreation Needs Assessment for downtown San Diego for the Centre City Development Corporation (CCDC). The City has undergone tremendous growth and redevelopment over the past 10 years, but Parks and Open Spaces have not kept pace with new development. Needs assessment techniques included an analysis of the existing system; evaluation of both existing and projected demographics; interviews and workshops with various stakeholders and focus groups; public workshops; and a mail/telephone survey. Intercept surveys were also conducted with downtown park users, visitors, residents and office workers. The Needs Assessment findings formed the basis of park “development programs” for both existing and proposed parks, as well as for the overall downtown Open Space, Parks and Recreation Master Plan.

#### **Northeast Everglades Natural Area (NENA) Master Plan, Palm Beach County, FL**

Principal-in-Charge of a long range plan unifying over 45,000 acres of public conservation lands owned and managed by Palm Beach County, the South Florida Water Management District, the Florida Fish and Game Commission, the City of West Palm Beach and other public agencies. The planning process included a comprehensive inventory and base map; a recreation needs assessment; a long range vision for recreation and environmental education centers, trailheads and trails; and an implementation strategy. An outcome of the project was the creation of a full time NENA Department and staff to implement the plan.

#### **St. Lucie County Western Lands Study**

Facilitator and planner for the St. Lucie County Western Lands Study, working with the University of Florida Center

for Building Better Communities. Assisted in planning and facilitating the American Assembly process to solicit input from key community stakeholders.

#### **Norfolk, VA, Recreation Master Plan**

Principal-in-Charge for the long range City-wide Recreation, Parks and Open Space Master Plan for the City of Norfolk, including an existing system analysis; needs assessment; long range vision; and implementation strategy. The highlight of the project was a three day visioning charrette, involving staff, consultants and community stakeholders, to develop long range visions for nine (9) elements of the system: parks, community centers, therapeutic recreation, athletic fields, bikeways and trails, beach and water access, public art and community character, programs, and operations and maintenance.

#### **Sustainability Workshops**

Facilitator for several workshops and planning processes dealing with local community sustainability issues, including building heights and densities, conservation lands, wildlife habitat protection and land use:

- City of Palm Beach Gardens Building Height Visioning Workshops
- Suwannee River Water Management District Excellence in Land Management Program
- Palm Beach County Manatee Protection Plan
- North Palm Beach County “Emerald City” Sustainability Workshop
- City of Juno Beach Height and Density Visioning Process
- Palm Beach County Commission Rural Lands Workshop

**MARIE L. YORK, FAICP**  
**York Solutions LLC, President**  
 957 Marlin Drive, Suite A, Jupiter, Florida 33458  
 561-222-1478 -- [visionaryplanning@gmail.com](mailto:visionaryplanning@gmail.com)

### Summary

Public Leadership and Facilitator - Experienced facilitator skilled in leading large public forums and local neighborhood workshops. Trained by the Florida Conflict Resolution Consortium. Life Coach certified by the San Diego Life Purpose Institute.

Management and Administration - Skilled in organizing complex subjects, solving problems creatively, leading through communication and collaboration, taking objective and logical actions, and making critical decisions. An extrovert who quickly understands people and their situations, who thinks analytically, who is able to see the big picture yet manage the details for implementation.

Research and Project Management - Public sector consultant and facilitator on urban and rural planning issues, public policy research, as well as the social, environmental, and economic issues of sustainability. Nationally recognized expert on program development: team creation and collaboration, developmental issues, research, and management. Innovator, self-starter with a high level of integrity.

### Experience

(2009-present) York Solutions LLC, President; Senior Fellow, Center for Building Better Communities, University of Florida. Florida clients include: St. Lucie County (visioning and planning for 200,000 acres); City of Boca Raton (charter school conversion feasibility); City of Boynton Beach (facilitation for strategic planning); Fellsmere (visioning and design); Broward County Cultural Plan (including Lauderdale Lakes, Lauderhill and the Broward Center for the Performing Arts).

(2000-2009) Florida Atlantic University's Center for Urban & Environmental Solutions (CUES) - Associate Director for Northern Campuses – opened, in Palm Beach County, Florida, a CUES office dedicated to fostering sustainability through an emphasis on design and smart growth strategies. Conceived and implemented a new venture, the Florida Public Officials Design Institute at Abacoa dedicated to providing public officials hands-on design training specific to their communities. As Director and facilitator, this program won three statewide awards for innovation. Also, managed and led projects in economic development and sustainability.

(1993-2009) College of Architecture Urban & Public Affairs at Florida Atlantic University - Adjunct Professor – taught *Planning of Urban Services, the Financial Environment of the Public Sector, Planning Design Studio* and *Designing the City*.

(1992-2000) Florida Atlantic University/Florida International University's Joint Center for Environmental and Urban Problems - Assistant Director - managed on-going operations and multi-disciplinary teams of researchers from public and private sectors, oversaw annual budget, responsible for bringing in and managing research projects from state agencies, foundations, and local governments.

(1987-2000) Florida Atlantic University/Florida International University's Joint Center for Environmental and Urban Problems - Senior Research Associate in Economics and Finance - directed numerous projects in comprehensive planning and growth management, urban economics, campus master planning, infill and redevelopment, housing, education, transportation, economic development, environmental issues, and innovative public finance. Developed budgets, methodologies and work programs. Delivered projects on deadline.

(1983-1987) City of Boca Raton, Florida - Economist Planner – conducted original research and managed projects on fiscal, community development, planning and growth management issues.

(1999-current) Extensive experience in leadership and management within professional organizations  
 - chaired large volunteer boards, directed staff and legislative representatives, presided at annual conferences, led overhaul of organizational structure for state organization, led fastest growing specialty division of national organization, created training sessions for leadership groups, convened and organized statewide workshops on planning, growth management and legislative processes, board director and officer of 45,000 member organization with two offices and 75 employees.

### **Education and Training**

B.A., Economics/Urban and Regional Planning, Florida Atlantic University, 1981, Highest Honors  
 M.A., Economics, Florida Atlantic University, 1982, Honors  
 Knight Fellow in Community Building, University of Miami, 2004

### **Professional Associations**

American Institute of Certified Planners, Fellow  
 American Planning Association, Board of Directors (2008-12), representing Alabama, Arkansas, Florida, Caribbean, Central America, Mexico and South America  
 Secretary/Treasurer (2010-2011)  
 Chair of the National Awards Jury  
*Planning and Environmental Law*, Reporter, publication of the American Planning Association  
 American Planning Association Chapter Presidents' Council (CPC) executive committee (2002-03);  
 Chair, Planning Accreditation Board Task Force (2002-03)  
 Florida Chapter of the American Planning Association: President (1999-02); Chair, Growth Management Review Task Force (2003-05); Executive and Legislative Committees (1995-05); V.P. for Professional Development (1996-98); President, Broward Section (1995)  
 New Urbanism Division of the American Planning Association (Chair 2005-07);  
 Congress for New Urbanism and Florida Chapter Congress for New Urbanism, member  
 Urban Land Institute (ULI): ULI Florida/Caribbean District Council, Vice Chair for Academia, (1999-00), Vice Chair for Elected Officials (2005-07)  
 Leadership Florida, Class XVI (Advisory Board 2006-08), Selection Committee (2010); Leadership Palm Beach and Broward Counties Alumna  
 Council for Sustainable Florida, Board of Directors, (1999-06)

### **Publications and Presentations**

Produced over 60 full-length research reports. Published 13 articles, including for the refereed *Journal of the American Planning Association*. Edited book on housing affordability. Other publications addressed growth management, urban design, transportation and the environment, financing of development, and innovations in public finance. Presented at national and state conferences in the U.S., as well as Europe, New Zealand and Thailand. Participated in professional audio programs and TV interviews.

### **Awards and Appointments**

Inducted into the College of Fellows of the American Institute of Certified Planners (2008) – the planning profession's highest award  
 Appointed to the Transportation Land Use Study Committee by the Florida Departments of Transportation and Community Affairs (1999)  
 Appointed by Florida Governor to the State Educational Facilities Study Committee (1994)  
 Selected by Rotary International for Group Study Exchange to New Zealand (1994)  
 Appointed by Florida's Governor to the Ad Hoc Work Group on Affordable Housing (1991)  
 Served as alternate member to Florida Governor's Task Force on Urban Growth Patterns (1988-89)  
 Received Scholarship Award for Outstanding Academic Achievement, 1981  
 Received Scholarship Award, Soroptimist Foundation, 1979

**JEAN SCOTT**

**Strategies for Livable Communities/SLC, LLC**  
**399 Paloma Avenue – Boca Raton, Florida 33486**  
**561-620-3815 – [jscott.commongroundplanning@gmail.com](mailto:jscott.commongroundplanning@gmail.com)**

Jean Scott, owner of Strategies for Livable Communities and Managing Partner of SLC/LLC, specializes in communications, outreach, and consensus building in public planning processes. Scott, who is also a Senior Fellow with the University of Florida Center for Building Better Communities, has 30-plus years of experience in designing project-tailored outreach strategies and messages, building collaborative partnerships, and synthesizing complex planning issues into language that is easy to digest and understand. In addition, she brings the unique perspective of someone who has worked at the local, state, and federal levels of government, and who has led a civic organization that focused on coordinated regional planning and resource management.

Her work on outreach and communication has been featured in presentations to groups such as the American Planning Association, the Florida Chamber of Commerce Short Course on Growth Management and Environmental Permitting, and the Florida Chapter of the American Planning Association (Florida APA). Her articles on best practices in Florida visioning, the use of peer review panels in planning and visioning processes, and features of successful charrettes were published in *Florida Planning*, the newsletter of Florida APA.

In 2007 Scott prepared *The Florida Planning Toolbox* ([www.cues.fau.edu/toolbox](http://www.cues.fau.edu/toolbox)) for the Florida Department of Community Affairs and the Center for Urban and Environmental Solutions at Florida Atlantic University. The *Toolbox* provides descriptions and examples of planning tools designed to promote economic prosperity and social equity, mitigate and adapt to climate change, facilitate infill and redevelopment, promote full housing choice and complementary transportation and land use planning, ensure a high level of public involvement and project monitoring, and conserve and enhance natural, water, coastal, and agricultural lands resources.

Scott has lived and worked as a consultant in Florida since 2000. Prior to that (1989-January 2000), she served as the Executive Director of Bluegrass Tomorrow (a regional planning civic leadership organization in the seven-county central Bluegrass Region of Kentucky) where she designed and implemented a nationally-recognized regional visioning process. Other accomplishments included successful initiatives to resolve divisive community planning conflicts and build areas of mutual action among competing interests; adoption of local plans that defined how to better use land inside and outside of urban growth boundaries and maintain farmland; a *Bluegrass by Design Handbook* to promote compatible development; and the *Bluegrass Corridor Management Planning Handbook* to link transportation and land use planning.

From 1970-1988, Scott worked in the U.S. Department of Housing and Community Development's Model Cities program and started and directed the state of Kentucky's Housing and Community Development division to oversee the administration of the Community Development Block Grant Program. She also directed a city of Ashland, Kentucky, department that included community and economic development, housing, neighborhood revitalization, and planning. In that capacity, Scott initiated the city's first business retention, tourism, main street, neighborhood development, and downtown streetscape improvement programs; regional economic development and labor management councils; tax incremental financing program; and a two-county Enterprise Zone that received a National Public-Private Partnership Award from the Council for Urban Economic Development.

**Jean Scott**  
**Strategies for Livable Communities/SLC, LLC**  
**399 Paloma Avenue – Boca Raton, Florida 33486**  
**561-620-3815 – jscott.commongroundplanning@gmail.com**

### HIGHLIGHTS OF EXPERIENCE

**Owner, Strategies for Livable Communities/Managing Member, SLC, LLC, 2000-Present**

Also a Senior Fellow for the Center for Building Better Communities, Jean Scott specializes in building collaborative partnerships among diverse interests, custom-tailoring outreach and communication strategies to effectively reach and engage target population groups, and developing communication outreach tools and reports designed to convey complex ideas and planning processes in words that are easy to understand and provide a foundation for collaborative actions. She has worked with a broad range of governmental and nonprofit organizations and universities in the areas of public education and involvement, community visioning, public policy analysis, and project management. Her projects fall in the areas of visioning and public outreach, planning and organizing for climate change, community design, transportation planning, regional planning and policy, and rural lands and natural systems planning

**President, Bluegrass Tomorrow, Lexington, Kentucky, 1989-2000**

A regional planning civic leadership organization made up of business, farming, preservation, development, and governmental interests in the seven-county central Bluegrass Region of Kentucky that was recognized as the place to find common ground solutions to divisive land use and community planning conflicts and build areas of mutual action among competing interests. Accomplishments include a nationally recognized regional visioning initiative, inter-county corridor management plans that link transportation planning with goals for land use and community character, the Bluegrass Public Officials Roundtable, a community design handbook (*Bluegrass by Design*), programs to maintain farmland including agricultural zoning and a purchase of development rights program, and land use reforms to better use land inside and outside of urban growth boundaries.

**Economic Development Coordinator, City of Ashland, Kentucky, 1985-1988**

Established the City's first Regional Economic Development Council, Labor Management Council, tax incremental financing bond issue (Kentucky's first) for a \$30 million downtown mall, two-county Enterprise Zone resulting in \$117 million in new investments and 3,600 jobs created or retained (received a National Public-Private Partnership Award from the Council for Urban Economic Development), and Business Retention, Tourism, and Main Street Programs

**Director, Department of Planning, Community Development, Transportation, and Code Enforcement, City of Ashland, Kentucky, 1979-1984**

Accomplishments included the City's first Downtown Improvement District, Small Business Center, and Neighborhood Improvement Program

**Director, Department of Community Development, City of Ashland, Kentucky, 1976-1978**

Initiated the City's first housing and community development programs

**Director, Division of Housing and Community Development, Kentucky Department for Local Government, Frankfort, Kentucky, 1974-1976**

Established the State of Kentucky's first housing and community development block grant programs, including training for local and regional agencies

**Federal Department of Housing and Urban Development, Atlanta, Georgia; Washington, DC; and Louisville, Kentucky, 1970-1974**

Assistant Field Support Desk Officer for the Assistant Secretary for Community Planning and Development, 1972-1974; Model Cities Representative, 1971-1974; Urban Intern, Atlanta Regional Office, 1970-1971

**Jean Scott**  
**Strategies for Livable Communities/SLC, LLC**  
**399 Paloma Avenue – Boca Raton, Florida 33486**  
**561-620-3815 – [jscott.commongroundplanning@gmail.com](mailto:jscott.commongroundplanning@gmail.com)**

## PROJECTS BY CATEGORY

### Visioning and Public Outreach

- Winter and Company (2008-2010) – Assisting with the neighborhood outreach component for the development of Neighborhood Development Criteria for Fort Lauderdale, Florida.
- University of Miami's School of Architecture Knight Program in Community Building (2008) – Prepared an in-depth evaluation of the Knight Program's five community charrettes. The report, *Evaluating Charrettes as a Tool for Community Building and Transformational Change*, included a set of lessons learned.
- Winter and Company (2007-2008) – Assisted with the neighborhood outreach component for the development of mass and scale standards for historic districts in West Palm Beach, Florida.
- The Florida Department of Community Affairs (DCA) and the Center for Urban and Environmental Solutions (CUES) (2007) – Prepared the peer-reviewed *The Florida Planning Toolbox* ([www.cues.fau.edu/toolbox](http://www.cues.fau.edu/toolbox)) to further visioning and planning initiatives in Florida by providing descriptions and examples of planning tools designed to promote economic prosperity and social equity, mitigate and adapt to climate change impacts, facilitate infill and redevelopment, promote full housing choice and complimentary transportation and land use planning, ensure a high level of public involvement, and conserve and enhance natural, water, coastal, and agricultural lands resources.
- University of Miami School of Architecture Knight Program in Community Building Lexington, Kentucky Legacy Initiative (2007) – Helped plan, conducted stakeholder outreach interviews, and coordinated a project peer review process for a community visioning project to identify legacy projects related to the city's hosting of the 2010 World Equestrian Games.
- CUES (2006) – Coordinated the development of an interactive regional learning game focused on key regional growth and resource management issues for the Committee for a Sustainable Treasure Coast (CSTC) regional visioning project and prepared the CSTC final report, *Sustainable Treasure Coast*.
- Jackson County, Florida (2001-2002) – Planned and managed the public communication and outreach components of a rural countywide visioning project. The visioning process earned a Promising Practices Award from the Commission for a Sustainable Florida.
- 1000 Friends of Florida (2000) – Prepared a report on the role of citizen-based organizations in shaping growth management policy.

### Expert Peer Review Panels in Visioning and Planning Processes

- Miami Corporation (2009) – Planned and managed a Peer Review of the conservation design-based Farmton Comprehensive Plan Amendment and prepared a report on the panel's findings. The plan will result in the conservation of 80-90 percent of the land, and new development will adhere to sustainable development standards.
- CUES (2006-2007) – Planned and managed a Peer Review Panel for the Broward County, Florida, School Board's Amended Interlocal Agreement for Public School Facility Planning and prepared a report on the panel's findings.

- Glattig Jackson Kercher Anglin Lopez Rinehart, Inc. (2005-2006) – Planned and managed the meetings of the Technical Resource Advisory Panel for the Martin County, Florida, Development Patterns Study and prepared reports on the panel's findings.
- CUES (2003-2005) – Planned and managed the meetings of the Technical Review Committee for the South Miami-Dade County Watershed Study and prepared reports on the committee's findings.
- Treasure Coast Regional Planning Council (2005) – Planned and managed a technical review panel for the Towns, Villages, and Countryside Plan for North St. Lucie County and prepared a report on the panel's findings.
- CUES (2001-2003) – Participated in, managed, and prepared reports for the Peer Review Panel for the Palm Beach County, Florida, Central Western Communities Sector Plan.

### **Planning for Climate Change**

- Florida Fish and Wildlife Conservation Commission (2009) – Prepared an analytical report detailing the findings from the 2008 Summit, *Florida's Wildlife: On the Frontline of Climate Change*. The report highlighted Florida's unique vulnerability to the most severe impacts of climate change.
- DCA and CUES (2007) – Prepared, as part of The Florida Planning Toolbox, a broad menu of strategies that can be used to mitigate and adapt to the projected impacts of climate change. Strategies are applicable for local governments and the community.
- Florida APA (2009) – Published an article in *Florida Planning* (the newsletter of Florida APA) on climate change-friendly transportation strategies that reduce vehicle miles traveled and made presentations (at the annual Florida APA conference) on organizing for climate change planning and implementation at the local government level.
- The Southern Alliance for Clean Air (2007) – Helped plan and prepared a report on a meeting designed to examine the climate change issues facing southeastern coastal states and create a southeast climate change network to address those issues.

### **Community Design and Real Estate Development**

- Southeast Florida/Caribbean District Council of the Urban Land Institute (2008-2010) – Participated in and prepared reports on Council-led Technical Assistance Panels designed to provide advice on local government issues in areas such as housing, parking, redevelopment, and future land development.
- University of Miami's School of Architecture (2010) – Updated course and test materials for the school's on-line certification program in the New Urbanism.
- Treasure Coast Regional Planning Council (2008) – Participated on the team to develop a master plan for the Intracoastal Waterway in Palm Beach County.
- Florida Public Officials Design Institute at Abacoa (2007-2008) – Participated in and prepared detailed reports summarizing the findings from the April 2008 and June and November 2007 Design Institutes where public officials were trained by a team of experts in architecture, urban design, city planning, transportation, finance, housing, and sustainable development.
- Treasure Coast Regional Planning Council (2006-2007) – Planned and managed initial stakeholder outreach interviews for a planning study of a 30-square mile Urban Redevelopment Area in Palm Beach County.
- Treasure Coast Regional Planning Council and the Florida Chapter of the Congress for the New Urbanism (2006) – Planned and managed a statewide workshop on Florida's New Urbanism.
- Florida Chapter of the Congress for the New Urbanism (2002 and 2005) – Prepared and edited the 2002 and 2005 *A Guidebook to New Urbanism in Florida* ([www.cnuflorida.org](http://www.cnuflorida.org)).

- CUES (2002) – Conducted a study of selected community-based initiatives in Southeast Florida for the South Florida Regional Resource Center.
- Lexington-Fayette County Urban County Government (2001) – Developed strategic planning elements for design standards to guide infill and redevelopment.
- CUES (2000) – Evaluated the status of community redevelopment and revitalization programs in Palm Beach County, Florida.

### **Growth Management**

- South Florida Regional Planning Council (2009) – Prepared the technical responses for the Town of Davie, Florida, Development of Regional Impact Application for Development Approval.
- Funders' Network for Smart Growth and Livable Communities (2005-2006) – Prepared a report analyzing successful state land use practices and lessons learned.
- State of Kentucky (2001) – Provided advice for the development of a state smart growth initiative.
- Growth Management Leadership Alliance (2001) – Planned and coordinated a 200 meeting on linking social equity to growth management.

### **Regional Planning and Policy Research**

- CUES and the Urban Land Institute (2008) – Prepared an article (“Southeast Florida: A Preview of America’s Future”) on South Florida demographic trends for *Urban Land Magazine*.
- Century Commission for a Sustainable Florida (2007) – Prepared the commission’s Second Annual Report highlighting the Commission’s actions to promote sustainable development in Florida.
- CUES (2006-2007) – Conducted research for and prepared the report, *Engaging Academia in Community Research: Overcoming Obstacles and Providing Incentives*. The report examined how similar centers and departments, both within Southeast Florida and across the country, connected their research capacity and expertise with the needs of their home region and community.
- CUES (2006-2007) – Prepared a report (*Framing Higher Education on Florida’s Treasure Coast*) analyzing the higher education offerings in Martin, St. Lucie, and Indian River counties. The report summarizes the region’s growth, the agents affecting it, and the current condition of higher education on the Treasure Coast, and recommends a set of next steps.
- CUES (2006) and the Florida DCA – Conducted research for and prepared the report, *Committee for a Sustainable Treasure Coast: Sharing Lessons Learned*. The report provides a way of sharing with other regions CSTC’s experiences and its regionalism lessons learned
- University of Miami School of Architecture Knight Program in Community Building (2005-2006) – Prepared a report analyzing the program offerings and lessons learned for 20 selected master’s in real estate and design programs.
- CUES (2003-2004) – Prepared the strategic plan elements for and helped establish a regional research collaborative focused on critical regional planning issues in South Florida.
- Urban Land Institute (2005) – Prepared the final report on the ULI Florida Initiative on Regional Cooperation, *Building Florida’s Future: State Strategies for Regional Cooperation*.
- Funders' Network for Smart Growth and Livable Communities (2004) – Prepared an analysis of academic centers in South Florida and the Chicago metropolitan area specializing in regional studies and regionalism.
- South Florida Regional Planning Council (2003) – Prepared a summary report on the May 2003 conference, *Building the Partnership: Strategies for Regional Collaboration*.
- CUES (2002) – Prepared an analytical report, *Creating a Regional Research Collaborative for Southeast Florida: Linking Regional Research to Sustainable Regional Growth*.

- Vanderbilt University (2000-2002) – Provided organizational and strategic planning assistance to a new regional citizen-based smart growth organization (Cumberland Region Tomorrow) in Nashville, Tennessee.
- Congress for the New Urbanism (2002) – Prepared an analysis of alternative chapter structures and a related *CNU Chapter Policies Handbook*.

### **Rural Lands and Natural Systems Planning**

- Center for Building Better Communities at the University of Florida (2010) – For the St. Lucie County Western lands Study, planned and prepared reports on two public rural lands planning educational forums, conducted stakeholder interviews, assisted with visioning meetings, and prepared an agricultural lands planning toolbox, *St. Lucie County Western Lands Study: Options and Opportunities for the Future*.
- Florida Fish and Wildlife Commission (2010) – Prepared a report synthesizing and highlighting the commission's work during 2008 and 2009 to develop an incentive- and consensus-based Cooperative Conservation Blueprint for Florida and conduct stakeholder interviews for regional pilot projects.
- Florida Fish and Wildlife Conservation Commission (2008-2009) – Managed, provided technical support to, and prepared summary reports for three working groups (land, water, and energy) charged with developing recommended landowner incentives needed to achieve an integrated system of natural resources, working landscapes, and habitat conservation strategies statewide.
- Florida Earth Foundation (2007-2008) – Prepared reports summarizing the findings of a 2008 statewide meeting and four 2007 regional forums on the future of agriculture and development in Florida and related issues and best practices.
- St. Lucie County, Florida (2006) – Planned and managed two workshops on implementing the open space components of the Towns, Villages, and Countryside Comprehensive Plan Amendments for North St. Lucie County.
- CUES (2004-2006) – Provided technical and management support for the Committee for a Sustainable Treasure Coast's (CSTC) Rural Lands Subcommittee and prepared reports summarizing the committee's findings.
- CUES (2005) – Provided technical and coordinating support for an agriculture fact-finding committee that provided input for the 2005 Palm Beach County Economic Summit.
- Treasure Coast Regional Planning Council (2004) – Prepared a summary report synthesizing the findings from the December 2003 conference, *The Future of the Region's Countryside*.
- Funders' Network for Smart Growth and Livable Communities (2004) – Prepared an analysis of academic centers in the Great Lakes states specializing in land use and the related issues of farmland and open space protection.
- Sonoran Institute (2003) – Provided technical support in the creation of a national network of Community Stewardship Organizations, non-profit organizations designed to integrate conservation and long-term stewardship into the real estate.
- Sarasota County, Florida (2001) – Facilitated a Rural Heritage and Agricultural workshop as part of the Sarasota 2050 planning process.
- Bluegrass Tomorrow (1989-2000) – Worked with local governments in the central Bluegrass region of Kentucky to adopt planning tools (agricultural zoning, transfer and purchase of development rights, cluster housing, and economic strategies to strengthen agriculture) that led to the conservation of farmland.

### **Transportation Planning**

- Renaissance Planning Group (2010) – Conducted research and key person interviews for and prepared reports on features of successful multi-county Metropolitan Planning Organizations.

- Congress for the New Urbanism and the U.S. Environmental Protection Agency (2008) – Conducted research for and assisted in planning stakeholder workshops that addressed emergency service providers' objections to narrow street design.
- Edwards Kelcey (2005-2008) – Assisted with the public outreach and communication components of the State Road 7 Extension Project Development and Environmental Study.
- Kentucky Transportation Cabinet (2003-2006) – Participated in the planning team for and prepared a model process report (*Community Building through Road Building: A Case Study in Community-Building and Road Design*) describing how road plans can be developed within a community- and environmental justice-based planning framework.
- South Florida Regional Planning Council (2002) – Prepared a model process report (*The State Road 7/U.S. 441 Collaborative*) on the SR 7/US 441 Partnership, a collaborative multi-government corridor planning initiative. The report included descriptions of other best practice models.
- Regional Plan Association (2001) – Coordinated a design workshop on redesigning strip highways in South Florida (also sponsored by CUES, the Lincoln Institute of Land Policy, and the South Florida Regional Planning Council).
- Bluegrass Tomorrow (1994-2000) – Worked with the Kentucky Transportation Cabinet to institute inter-county corridor management plans that linked transportation planning with goals for land use and community character through context sensitive design and early and consistent public involvement. The initiative included preparation of the *Bluegrass Corridor Management Planning Handbook* that gained Federal Highway Administration (FHWA) recognition.
- Bluegrass Tomorrow (1990-2002) – Convened and managed a consensus building planning process that led to the award-winning context sensitive design for the Paris-Lexington Road in the central Bluegrass region of Kentucky.

#### **Water Resources Planning**

- The Florida Conflict Resolution Consortium Consensus Center (2010) – Prepared a report on the April 2010 Saltwater Recreational Fishing Summit sponsored by the National Oceanic and Atmospheric Administration to examine the most urgent challenges facing the recreational saltwater fishing community and potential actions to meet those challenges.
- Ocean Research and Conservation Association (2009) – Helped plan and prepared a report on the workshop, *Just Add Water: Initiating a Watershed Restoration Dialogue with Upper Kissimmee Basin Landowners*.
- Decision Makers Forum (2008) – Prepared a report synthesizing the findings from the January 2008 forum, *Lake Okeechobee: Headwaters of the Everglades*.

#### **PROFESSIONAL CONTRIBUTIONS AND RECOGNITIONS**

- Presentation on landscape-scale conservation planning to the 2010 Florida Chamber Growth Management, Energy, Climate Change, and the Environment Short Course
- Presentations on organizing for sustainability, meaningful citizen engagement strategies in neighborhood conservation planning initiatives, and the case for private landowner conservation incentives to the 2009 meeting of the Florida Chapter of the American Planning Association
- Presentation on private landowner conservation incentives to the 2009 Florida Chamber of Commerce Growth Management and Environmental Permitting Short Course
- Presentation on the use of payments for ecosystems service as a way to conserve farmland and on actions that local governments may take to address climate change to the 2008 meeting of the Florida Chapter of the American Planning Association

- Presentation on the Effective Habits of Florida Visioning to the 2006 and 2007 Florida Chamber of Commerce Growth Management and Environmental Permitting Short Course
- Presentation on Building the Capacity to Act Regionally to the 2005 Florida Chamber of Commerce Growth Management and Environmental Permitting Short Course
- Presentations on Use of Peer Reviews in Master Planning Processes and on Regional Ad Hoc Collaborations to the 2005 American Planning Association Annual Conference
- Founding Executive Secretary of the Florida Chapter of the Congress for the New Urbanism
- Presentation on Communication Tools for Planning Rural Landscapes to the 2004 American Planning Association annual conference
- Presentation on Smart Communication Tools for Planners to the 2004 Florida Chamber of Commerce Growth Management and Environmental Permitting Short Course
- Presentation on Communication Tools for Planners to the 2003 meeting of the Florida Planning Association
- Presentation on the regional planning context of Lexington-Fayette County, Kentucky's farmland preservation program to the Treasure Coast Regional Planning Council's December 2003 conference, "The Future of the Region's Countryside"
- 2003 Sustainable Florida Promising Practices Award for the Jackson County Visioning Project, Imagine Jackson
- Presentations on Coordinating Smart Growth and Farmland and on Highway Design and Neighborhood Plans to the 2002 American Planning Association annual conference
- Presentation on results of two rural visioning projects to the 2002 Florida Chamber of Commerce annual Environmental Permitting and Growth Management Short Course
- National report, *The Role of Citizen Organizations in Growth Management*, presented to the 2001 meeting of the Florida Chapter of the American Planning Association
- Bluegrass Regional Vision and farmland protection programs highlighted in the National Trust for Historic Preservation's 1999 report, *Challenging Sprawl – Organizational Responses to a National Problem*, and in the Smart Growth Network's Spring 1999 issue of *Getting Smart*
- Bluegrass Tomorrow regional vision and growth planning initiatives highlighted in the Lincoln Institute of Land Policy's January 1999 issue of *Landlines*
- Bluegrass Tomorrow Corridor management work highlighted in the National Association of Local Government Environmental Professionals 1999 report, *Profiles of Business Leadership on Smart Growth*
- Bluegrass Tomorrow Regional vision and corridor planning initiatives featured in the October 1998 issue of *Southern Living*, the 1998 national corridors conference "Beyond the Pavement"
- Bluegrass Tomorrow Regional visioning project presented at the Urban Land Institute's 1998 National Smart Growth Conference and at the fall 1998 Kentucky-Indiana meeting of the American Planning Association

## EDUCATION

MA, American Studies, January 1970, University of Maryland, College Park, Maryland

BA, Human Relations, May 1968, University of Kentucky, Lexington, Kentucky

**ANN MARIE SORRELL, MBA**

Email: asorrell@upscalebymosaic.com

1531 N. Drexel Rd #237 · West Palm Beach, FL 33417

Phone: (561) 531-4046

**EDUCATION**

Nova Southeastern University Ft. Lauderdale, FL  
 H. Wayne Huizenga School of Business and Entrepreneurship  
**Master of Business Administration**

Florida A&M University Tallahassee, FL  
**Bachelor of Science: Health Care Management (Cum Laude)**

**WORK HISTORY**

*The Mosaic Group* West Palm Beach, FL 04/05-present  
**President & CEO**

- Manage daily operations, contracts, and new business development
- Manage and direct approximately 5-12 team members per project including ABC's Extreme Makeover: Home Edition, Real Men Talking multi-media stage production, public involvement projects, community events, non-profit agencies, conferences, and more
- Manage day-today project operations and activities including contract negotiations and billing
- Develop branding, marketing, public relations and advertising strategies for organizations
- Assist in the development & implementation of strategic marketing and outreach plans for not-for-profit & government agencies, small businesses, and corporations
- Cultivate ongoing relationships with the business and philanthropic community
- Develop ongoing relationships with media contacts

***Organizations Represented (partial list):***

- ✓ AECOM
- ✓ Marriott Vacation Club
- ✓ Plantation General Hospital
- ✓ City of West Palm Beach
- ✓ South Florida Water Management District
- ✓ Florida Department of Environmental Protection
- ✓ Big Brothers Big Sisters

*Majestic Homes & Realty* Royal Palm Beach, FL 06/2005-08/2006  
**Management Analyst/Marketing Director**

- Worked with management team to analyze company operations and develop strategies to increase efficiency and decrease cost
- Performed financial analysis and developed strategies to improve financial performance
- Managed all marketing activities including advertising, promotions and community involvement
- Performed competitive local industry analysis
- Developed strategic marketing plan with measurable marketing strategies and goals
- Assisted Sales Manager with sales force training/development and team building activities

**Cornerstone Group, Inc** West Palm Beach, FL 09/2004-04/2005

**Marsh Harbour Town Homes & Villas**

**Sales Associate**

- Top Sales Professional on a team of five Salespersons
- Sold 40% of 402 townhomes & villas starting from the \$150's in five months
- Managed daily escrow deposits that averaged from \$20k-150k
- Served as spokesperson at 8 homebuyer events that contributed to an increase in sales by 15%
- Provided exceptional customer care to more than 2,000 home buyers & prospective buyers

**Enterprise Rent-A-Car** West Palm Beach, FL 03/2004-09/2004

**Assistant Manager**

- Assisted in the management of all branch operations
- Provided excellent service to customers renting vehicles. Ranked 3rd highest Enterprise Service
- Quality Index (ESQI) in the region with a score of 87% (Exceeded corporate average of 78%)
- Ranked among the top 10% in regional Damage Waiver sales
- Developed relationships with local business partners which increased customer base, fleet growth, and total income per car by approximately 20% within a three month period
- Selected for Enterprise's Best Person Program

**Other Work Experience**

- **Vocational Evaluator & Case Mgr** - Palm Beach Habilitation Ctr, Inc. (2002-2003)
- **Life Skills Trainer/Coach** – Pyramid Adult Day Training Center (2000-2002)
- **Brand Manager** – Books-A-Million (2000)

**AFFILIATIONS**

- Girls II Women, Inc., **Board of Directors, Member** (since 2002)
- Urban League Guild of Palm Beach County, **President** (2007-2009)
- Urban League of Palm Beach County, **Board of Directors, Member** (2005-2009)
- Executive Women of the Palm Beaches, **Member**
- Delta Sigma Theta Sorority, Inc., **Member**
- National Black MBA Association, **Member**
- Gold Coast Public Relations Council, **Member**
- Girls Leadership Institute, **Volunteer**
- American Cancer Society Relay for Life, **Co-Chair** (Riviera Beach 2007-2008)
- Urban League Young Professionals of Palm Beach County, **President** (2005-2006)
- Black Chamber of Commerce of Palm Beach County, **Business Before/After Hours Chair** (2004-2006)

**AWARDS**

- 2010 Success South FL Magazine Top Business Leader under 40 Award Recipient
- 2010 South Florida Business Leader Women Extraordinaire Award Recipient
- 2007 Bank of America Local Hero Award Recipient
- 2007 Athena Awards Finalist, Young Professionals Category

**REFERENCES**

Available upon request



**Frances Chandler-Marino**  
Principal, Director of Regional Planning

**Education**

B.S. in Economics, Stetson University, (1984)

**Affiliations**

American Planning Association  
Florida Planning and Zoning Association (FPZA)  
International City/County Management Association

**Awards + Honors**

Smart Charlotte 2050 Update to the Comprehensive Plan, FPZA Outstanding Long-Range Study Award (2009)  
Pasadena Hills Area Plan FAPA Award of Merit (2008)  
Pasadena Hills Area Plan, FPZA Outstanding Public Study Award (2008)  
Haines City Special Area Plan City View, Florida Planning and Zoning Public Study Award (2007)  
NE Pasco County Special Area Plan, FPZA Award of Merit (2006)  
Seminole County Rural Character Plan, FPZA Award of Merit (2006)  
NE Pasco County Special Area Plan, Tampa Bay Regional Planning Council  
Future of the Region Community Service Award (2006)  
Pasco County Evaluation and Appraisal Report, FPZA Outstanding Public Report Award (2005)  
National Charrette Institute Certification (2007)

**Publications + Technical Papers**

Collaborating to Prevent Sprawl, Chapter 4, ICMA Green Book – Local Planning: Contemporary Principles and Practice. Published by ICMA Press in cooperation with the American Planning Association and University of Pennsylvania School of Design, 2008

**Lectures + Instruction**

Instructor, Department of Community Affairs Growth Management Workshop, How to Prepare an Evaluation and Appraisal Report (2004)  
Instructor, Florida Chamber Growth Management and Environmental Permitting Short Course (2002)  
Instructor, National APA Conference, Value Added Planning (1999)  
Instructor, Florida APA Conference, Building Sustainable Communities (1999)  
Instructor, Florida chamber Growth Management Short Course, Innovations in Planning (1996, 1997, 1998)

**Professional History**

2009 – Present  
Design + Planning at AECOM  
Principal, Director of Regional Planning

2001 – 2009

Glatting Jackson Kercher Anglin, Inc.  
Principal, Director of Regional Planning

2000 – 2001

Seminole County  
Deputy County Manager

1997 – 2000

Seminole County  
Director, Planning & Development

1991 – 1997

Seminole County  
Comprehensive Planning Division Manager

Frances has over twenty years of experience in all facets of local government comprehensive planning and land development regulation. These responsibilities have been as a front-line manager who must develop, enforce and comply with a breadth of permitting and regulatory responsibilities.

- Long-range Comprehensive Planning, Creation of New and/or Updated Elements in Compliance with HB 697
- Zoning and Site Plans
- Land Development Regulations
- Environmental Policy Conflict Resolution and Consensus Building
- Formation of Economic Development Strategies and Financial Planning
- Legislative Monitoring
- Expert Witness

**Project Experience**

**City of Ocoee, CRA Vision Plan, Ocoee, FL**

The CRA Vision Plan developed in 2009-2010 addresses general framework components such as land use, open space, and future road network, and also focuses specific planning efforts on three Target Areas. Target Area frameworks include design regulations for road network, block size, building placement, mix of uses and parking.

#### **City of Maitland Evaluation and Appraisal Report (EAR) & EAR Based Amendments, Maitland, FL**

In May of 2008, the City of Maitland retained Glatting Jackson to prepare an EAR for the City's Comprehensive Development Plan (CDP). Subsequent to the EAR, the City retained Glatting Jackson to prepare the EAR based amendments.

#### **Smart Charlotte 2050 Update to Comprehensive Plan, Charlotte County, FL**

In the Spring of 2008, Glatting Jackson was retained by Charlotte County to completely update the County's Comprehensive Plan entitled "Smart Charlotte 2050," that includes an interactive, web-based component to help citizens and stakeholders participate in the process and easily access information. A vision framework was created and then translated to new Goals, Objectives, and Policies that address land-use and growth management, economic development, capital improvements and design.

#### **City of Eustis, Form-Based Code, Eustis, FL**

In July of 2008, the City of Eustis adopted a new form-based code developed by Glatting Jackson in response to concerns by the City Commission and local stakeholders who were interested in creating a new land development code that would function to streamline the approval process, create clear design standards consistent with the City's vision, reinforce the character of each community district, and implement the City's downtown Master Plan.

#### **Haines City Evaluation/Appraisal Report, Haines City, FL**

On July 17, 2008 the City of Haines City retained Glatting Jackson to prepare an EAR for the City's Comprehensive Plan which was unanimously adopted by the City Commission on May 12, 2009.

#### **Highlands County Strategic Framework Plan, Highlands County, FL**

Assist the County in creating a Long-Range Strategic Growth Management Plan constructed around four Framework Principles including Natural Resources, Town Form, Agricultural Areas, and Economic Development.

#### **Haines City Selected Area Plan: City View, Haines City, FL**

The City of Haines City retained Glatting Jackson to prepare a long-term vision plan for approximately 37,000 acres of land located approximately 40 miles south west of Orlando in Polk County. The plan identifies the vision for the ultimate build-out of the community beyond the year 2030 and includes a vision plan, preparation of a Comprehensive Plan Amendment and a City/County Joint Planning Agreement.

#### **Riverside Avondale Zoning Overlay District, Jacksonville, FL**

The City of Jacksonville hired Glatting Jackson to create a zoning overlay for the Riverside/Avondale area that would help maintain the historic character of the area, provide flexibility for redevelopment while protecting the stable existing single family historic residential community.

#### **Pasco County – Pasadena Hills Area Plan, New Port Richey, FL**

Glatting Jackson developed an Area Plan for the Pasadena Hills study area that comprises approximately 22,000 acres of mostly undeveloped land in east-central Pasco County. Major study components include development of a vision plan, market assessment, funding analysis and alternatives, and Comprehensive Plan amendment.

#### **Manatee County Character Compatibility Study, Bradenton, FL**

Manatee County retained Glatting Jackson to conduct a character compatibility study in late 2005. This study created a strategy that addressed height and compatibility throughout the County to create compatible standards.

#### **NE Pasco County Special Area Plan, New Port Richey, FL**

Glatting Jackson created new goals, objectives and policies for the Comprehensive Plan that addressed the use of Conservation Subdivisions, defining a geographic Rural Boundary, limiting alterations of the existing topography, new criteria for residential zoning, non-residential design standards, rural lighting standards, roadway corridor overlay standards, and other measures to help protect rural character in Northeast Pasco County.

#### **Pasco County EAR and Update to the Comprehensive Plan, New Port Richey, FL**

Pasco County retained Glatting Jackson to complete the EAR and completely update the Comprehensive Plan. This process included the preparation of the necessary research, data collection and analysis to create a new growth management strategy that addressed the major issues and other special topic areas raised in the EAR as well as new amendments as directed by the County (adopted by the BoCC on June 27, 2006.)

#### **Seminole County - 2006 Rural Character Plan, Sanford, FL**

Prepared the plan that evaluates the effectiveness of rural planning policies over a fifteen-year time interval, identifies issues, establishes effective transition policy along the rural boundary, and provides recommendations for continued protection.



**Nancy M. Roberts**  
**Senior Associate, Planning Manager**

**Education**

M.S. in Urban and Regional Planning, Florida State University, April 1997  
 B.S. in Economics, Florida State University, December, 1991

**Affiliations**

American Planning Association  
 Florida Planning and Zoning Association (FPZA), Past President,  
 Central Florida Chapter, 2003-2004  
 FPZA State Executive Board, since 2005; President Elect 2010  
 Florida Redevelopment Association

**Awards + Honors**

Smart Charlotte 2050 Update to the Comprehensive Plan, FPZA Outstanding  
 Long-Range Study Award 2009  
 Pasadena Hills Area Plan, FAPA Award of Merit, 2008  
 Pasadena Hills Area Plan, FPZA Outstanding Public Study Award, 2008  
 Haines City Special Area Plan City View, FPZA Public Study Award, 2007  
 Seminole County Rural Area Plan, FPZA Award of Merit, 2006  
 NE Pasco County Special Area Plan, Tampa Bay Regional Planning Council,  
 Future of the Region Community Service Award, 2006  
 Pasco County Evaluation and Appraisal Report, FPZA Outstanding Public  
 Report Award, 2005  
 Chuluota Nonresidential Design Standards, FPZA Outstanding Public Report  
 Award, 2000

**Publications + Technical Papers**

Collaborating to Prevent Sprawl, Chapter 4, ICMA Green Book – Local  
 Planning: Contemporary Principles and Practice. Published by ICMA Press in  
 cooperation with the American Planning Association and University of  
 Pennsylvania School of Design, 2008

**Lectures + Instruction**

Speaker, American Planning Association National Planning Conference,  
 Florida Master Planning, New Towns from Scratch to After  
 Incorporation, 2008  
 National Charrette Institute Certification 2007  
 Co-Conference Chair, FPZA, 54<sup>th</sup> Annual State Conference 2006

**Professional History**

2009 – Present  
 Design + Planning at AECOM, Planning Manager, Orlando, FL  
 2003 – 2009  
 Glatting Jackson Kercher Anglin, Inc., Planning Manager, Orlando, FL  
 2001 – 2003  
 Renaissance Planning Group, Senior Planner, Orlando, FL  
 1999 - 2001  
 Seminole County, Senior Planner, Sanford, FL  
 1997 - 1999  
 City of Tallahassee, Senior Planner, Tallahassee, FL

Nancy has over twelve years of experience in urban and regional planning in city and county government planning departments and the private sector as a community planner. Nancy's planning experience includes long-range comprehensive and neighborhood planning projects, sustainable and energy-efficient policy and code development, land development code updates, site plan review, economic development initiatives, and public facilitation. Nancy has prepared extensive planning analysis, data and recommendations for state agencies, local governments, the development community and general public for various local government planning projects.

- Comprehensive Planning, Creation of New and/or Updated Elements in Compliance with HB 697
- Special Area/CRA Planning
- Zoning and Site Plan Review
- Economic Development Strategic Planning
- Development of Regional Impact (DRI) Review
- Environmental Policy

**Project Experience**

**City of Ocoee, CRA Vision Plan, Ocoee, FL**

The CRA Vision Plan developed in 2009-2010 addresses general framework components such as land use, open space, and future road network, and also focuses specific planning efforts on three Target Areas. Target Area frameworks include design regulations for road network, block size, building placement, mix of uses and parking.

**City of Maitland Evaluation and Appraisal Report (EAR) & EAR Based Amendments, Maitland, FL**

Prepared an EAR for the City's Comprehensive Development Plan (CDP). Subsequent to the EAR, the City retained Glatting Jackson to prepare the EAR based amendments.

### **Smart Charlotte 2050 Update to Comprehensive Plan, Charlotte County, FL**

Updated the County's Comprehensive Plan entitled "Smart Charlotte 2050," that includes an interactive, web-based component to help citizens and stakeholders participate in the process and easily access information. A vision framework was created and then translated to new Goals, Objectives, and Policies that address land-use and growth management, economic development, capital improvements and design.

### **East Polk Selected Area Plan, Bartow, FL**

Glattig Jackson conducted the East Polk Selected Area Plan which includes the development of an Existing Conditions Profile, Vision Plan, and translation of the Vision to recommendations for Comprehensive Plan Goals, Objectives, and Policies and Map Amendments, finalized in November, 2008.

### **Haines City Evaluation and Appraisal Report, Haines City, FL**

On July 17, 2008 the City of Haines City retained Glattig Jackson to prepare an EAR for the City's Comprehensive Plan which was unanimously adopted by the City Commission on May 12, 2009.

### **Highlands County Strategic Framework Plan, Highlands County, FL**

Highlands County retained Glattig Jackson to assist the County in creating a Long-Range Strategic Growth Management Plan constructed around four Framework Principles including Natural Resources, Town Form, Agricultural Areas, and Economic Development. Implementation strategies included potential Comprehensive Plan amendments and performance standards for development review.

### **Haines City Selected Area Plan: City View, Haines City, FL**

The City of Haines City retained Glattig Jackson to prepare a long-term vision plan for approximately 37,000 acres of land located approximately 40 miles south west of Orlando in Polk County. The plan identifies the vision for the ultimate build-out of the community beyond the year 2030 and includes a vision plan, preparation of a Comprehensive Plan Amendment and a City/County Joint Planning Agreement.

### **Bradenton Evaluation and Appraisal Report and Comprehensive Plan Update, Bradenton, FL**

The City of Bradenton retained Glattig Jackson to prepare an EAR and EAR Based Amendments for the City's

Comprehensive Plan which was unanimously adopted by the City in August of 2008.

### **Pasco County – Pasadena Hills Area Plan, New Port Richey, FL**

Glattig Jackson developed an Area Plan for the Pasadena Hills study area that comprises approximately 22,000 acres of mostly undeveloped land in east-central Pasco County. Major study components include development of a vision plan, market assessment, funding analysis and alternatives, and Comprehensive Plan amendment.

### **Manatee County Character compatibility Study, Bradenton, FL**

Manatee County retained Glattig Jackson to conduct a character compatibility study in late 2005. This study created a strategy that addressed height and compatibility throughout the County to create compatible standards.

### **Northeast Pasco County Special Area Plan, New Port Richey, FL**

Glattig Jackson created new goals, objectives and policies for the Comprehensive Plan that addressed the use of Conservation Subdivisions, defining a geographic Rural Boundary, limiting alterations of the existing topography, new criteria for residential zoning, non-residential design standards, rural lighting standards, roadway corridor overlay standards, and other measures to help protect rural character in Northeast Pasco County.

### **Pasco County EAR and Update to the Comprehensive Plan, New Port Richey, FL**

The Pasco County Board of County Commissioners (BCC) retained Glattig Jackson to complete the EAR and completely update the Comprehensive Plan. This process included the preparation of the necessary research, data collection and analysis to create a new growth management strategy that addressed the major issues and other special topic areas raised in the EAR as well as new amendments as directed by the County. The Comprehensive Plan was adopted by the BCC on June 27, 2006.

### **Seminole County – 2006 Rural Character Plan, Sanford, FL**

Glattig Jackson prepared the Seminole County 2006 Rural Character Plan that evaluates the effectiveness of rural planning policies over a fifteen-year time interval, identifies issues through engagement of the community, establishes effective transition policy along the rural boundary, and provides recommendations for continued protection.



**Brent Lacy, AICP**  
**Director of Transportation Planning & Engineering**

**Education**

A.S., Polk State College, Construction Technology  
 Design of Urban Streets, National Highway Institute

Preparation of Environmental Documents, National Highway Institute

**Accreditation**

American Institute of Certified Planners, #018053  
 Institute of Transportation Engineers, #13926

**Affiliations**

American Planning Association  
 Past Vice Chairman, Heart of Florida APA Section  
 Past Chairman, FSITE Florida Planning Council  
 HOF Executive Committee, 2006 - 2010

**Awards + Honors**

Transportation Professional of the Year; ITE District 10 / FSITE; 2005

CR 466 PD&E Study; Certificate of Appreciation – Town of Lady Lake, Florida

"Barton-Aschman Award for Technical Excellence", Collins Avenue PD&E Study-Design Traffic Report

Heart of Florida Section APA – Recognition for Special Advisory Services to the Executive Committee, 2009 – 2010.

**Recent Publications + Technical Papers**

"Smarter Transportation Becomes Reality, Even in Tough Economy," Co-Author, Newsletter of the Orlando Metro Section, Florida Chapter of the American Planning Association, Summer, 2009

"Traditional Development Trip Generation Characteristics" – FLITE Newsletter, Fall 2005

"Back to the Future at 250 mph." Articles on magnetic levitation train system in Georgia – The Atlanta – Chattanooga Corridor - Georgia Engineer – May 2000

"The Atlanta Region Magnetic Levitation Project." National Association of Railroad Passengers – February 2000

Brent has managed multiple continuing-service contracts and related projects for municipal and private clients throughout Florida. He has successfully completed projects from development through implementation. His role has included project scope and goals, development of project schedules and coordination with clients; data collection management, development and analysis of alternatives, design and evaluation of parking facilities, and analysis of community impact and transportation operations; and preparing alternatives analysis, environmental, and engineering documents and traffic impact studies.

Brent's project experience includes major transportation planning studies, route location studies, medical and university campus planning, growth management studies, corridor operations studies, environment assessment studies, MIS & EIS studies, capacity analysis studies, traffic impact and parking demand studies, and preliminary highway and transit system planning.

**Project Experience**

**County Road 466 PD&E, Town of Lady Lake, FL**

AECOM and its team of subconsultants completed the County Road 466 PD&E Study for Lake County and the Town of Lady Lake, conducting the necessary engineering and environmental evaluations to determine the most appropriate design and location of improvements that would modify this rural two-lane roadway to an urban four-lane facility. The study was conducted in accordance with the Florida Department of Transportation PD & E Study Manual and Guidelines. The project included a comprehensive public involvement program that involved the local residents and government officials in the development of improvement concepts and features through the public design charrette process. Construction of the project is scheduled for completion in early 2010.

### **Atlanta-Chattanooga MAGLEV Deployment Study, Atlanta Metro & North Georgia Counties**

Brent led the diverse team of American and German planners, engineers and electromagnetic designers in the evaluation and preparation of NEPA documentation for the Atlanta-to-Chattanooga Corridor. The study included the comparative analysis of alternative high-speed technologies, comprehensive evaluation of system design considerations, studies of impacts on the human and natural environments, ridership and revenue forecasts, operating and maintenance cost analysis, and detailed construction cost estimates.

### **Orange Avenue Parking/Pedestrian Design, Orlando, FL**

The City of Orlando and Orlando Health collaborated on the development of context sensitive design plans for the Orange Avenue Corridor that travels through the downtown medical campus. Sidewalk, landscape, lighting and parking facilities were incorporated into the corridor design plans prepared by AECOM staff. Brent served on the corridor design team to evaluate the parking recommendations, prepare access modification recommendations and provide liaison between the hospital plant management staff and the Florida Department of Transportation (FDOT), the permitting agency for the Orange Avenue improvements. Following a series of coordination meetings between the hospital, the design team and FDOT, agreements were reached on each proposed sidewalk, landscape, parking and access design included in the corridor modification plans.

### **County Road 466 PD&E, Town of Lady Lake, FL**

AECOM and its team of subconsultants completed the County Road 466 PD&E Study for Lake County and the Town of Lady Lake, conducting the necessary engineering and environmental evaluations to determine the most appropriate design and location of improvements that would modify this rural two-lane roadway to an urban four-lane facility. The study was conducted in accordance with the Florida Department of Transportation PD&E Study Manual and Guidelines. The study limits for the project were from west of the Sumter/Lake County line to Lake Griffin Road, just east of US 27/441, a distance of just over two (2) miles. The project included a comprehensive public involvement program that involved the local residents and government officials in the development of improvement concepts and features through the public design charrette process. The results from those multi-day work sessions were largely incorporated into the preliminary design and engineering plans for the project. Construction of the project is scheduled for completion in early 2010.

### **Haines City SAP – “City View” 2035, City of Haines City, FL**

The City of Haines City, located in northeast Polk County in the heart of central Florida, retained AECOM to prepare a long-term vision plan for approximately 37,000 acres of land located approximately 40 miles south west of Orlando in Polk County. This area includes the existing city limits as well as lands that are in unincorporated Polk County surrounding the City. The transportation planning staff of AECOM prepared roadway typical sections, a connectivity matrix and preliminary cost estimates for an update to the capital improvements element. Future public transportation plans and “high use” locations were identified to assist in the expansion and development of the planned transit service in Polk County. The end product includes a vision plan that provides a “menu” for a sustainable community well served by a connected roadway system and supportive of neighborhoods that are diverse, with multiple housing choices and responsive to changing market demands. Implementation steps to the study included preparation of a Comprehensive Plan Amendment and a City/County Joint Planning Agreement.

### **Additional experience includes:**

- East Polk County 2030 Network Needs Study, Polk County, FL
- Old Florida Plantation DRI Transportation and Land Use Planning, Bartow, FL
- Winter Springs Town Center Transportation Planning and Traffic Engineering, Winter Springs, FL
- Florida Gulf Coast University, Lee County, FL
- Atlanta-Chattanooga MAGLEV Deployment Study, Atlanta Metro & North Georgia Counties
- City of Sanford Hotel & Conference Center Traffic and Parking Study, Sanford, FL
- 205- 215 East Central – Traffic Engineering Orlando, FL
- CNL Tower II, Orlando, FL
- University of Central Florida Master Plan, Orlando, FL
- Young Harris College, Young Harris, GA
- Orlando Health Campus, Orlando, FL
- Orlando Health Medical Campus, Orlando, FL
- Orange Avenue Parking & Pedestrian Design, Orlando, FL
- University of South Florida, Polk County, FL
- Orlando International Airport Expansion, Orange County



## Michael Sobczak, ASLA

### Urban Designer

#### Education

Master of Landscape Architecture Univ. of Virginia (1990)  
Bachelor of Landscape Architecture Univ. of Florida (1982)

#### Professional Registrations

Landscape Architect, Massachusetts #813 (1986)

#### Awards and Honors

Member, American Society of Landscape Architects

#### Professional History

2002-2009 Glatting Jackson Kercher Anglin, Inc.  
Senior Associate

1996-2002 University of Florida - Gainesville, FL  
Department of Landscape Architecture  
Assistant Professor

2000-2000 EDAW, Inc. Denver, CO  
Landscape Architect

1992-1996 Ball State University - Muncie, IN  
Department of Landscape Architecture  
Assistant Professor

1990-1992 Sasaki Associates, Inc. - Washington, DC  
1982-1988 Sasaki Associates, Inc. - Watertown, MA  
Associate Landscape Architect

1981-1981 EDSA, Inc. - Fort Lauderdale, FL  
Internship

Mike is experienced in master planning, site design, and landscape architectural design and construction documentation. He has worked on a broad range of recreation, streetscape, residential and commercial projects located throughout the United States with a primary focus on place making and the design of the public realm.

#### Project Experience

##### Old School Square Park, Delray Beach, FL

This recently completed three acre public park in the heart of the downtown is the major civic gathering space for the City. Designed as a flexible open space to accommodate concerts, festivals and other public and private gatherings, the park also is a setting for temporary and fixed art installations and exhibits as the outdoor component of the Old School Square Cultural Arts Center. Moveable chairs and tables help personalize the use of the park and animate the adjacent street in this busy restaurant and arts district. Future plans for the park include an interactive fountain and a video display wall along the adjacent garage facade. Mike's role was senior designer and project manager from master plan through construction documents.

##### Indian Riverside Park, Jensen Beach, FL

This Martin County park includes a variety of education and passive recreation venues on a site with archaeological, environmental and cultural significance for the region. A sixty acre site with Indian middens along a thirty foot high bluff, was a farming estate house in the 1920's, a convent in the 1950's, and a college campus in the 1970's. The final phases of construction are nearing completion and the master plan for a Maritime Museum at the northern edge of the park is complete; the Museum Board is actively seeking funds for construction. Mike was responsible for the project management and design from master plan through design development. Mike's role was senior designer and project manager from master plan through schematic design for phases 2 and 3.

**Seaboard Rail Station Plaza, West Palm Beach, FL**

Mike is currently the senior designer for the site surrounding this historic rail station built by Henry Flagler. The area is being redesigned to resolve circulation conflicts in a manner sympathetic to the historic character of this National Register building.

**A1A, Fort Lauderdale, FL**

The project encompassed over a mile of FDOT ROW through the City and included: eliminating two and narrowing the remaining four travel lanes; adding on-street parking; and widening the sidewalks to create a pedestrian and bicycle promenade with street trees and site furnishings. Mike was the senior designer.

**Coleman Pk. Neighborhood Plan West Palm Beach, FL**

A neighborhood rich in history but experiencing setbacks in safety, appearance, and social stability. The planning process involved residents, business owners, property owners and other stakeholders to provide input regarding their vision for the neighborhood and how to attain that vision. Two categories of recommended improvements resulted from this process: 1.) Programmatic Improvements address basic needs such as safety, jobs, housing, appearance and education. 2.) Physical Improvements address higher level needs such as streetscapes, commercial redevelopment and recreation enhancements. Mike was the project manager and senior planner.

**Congress Avenue Park, Boynton Beach, FL**

Inclusive playground with passive open spaces and walking trails that are attractive and useful for people of all ages and abilities. Mike was the senior designer from master plan through design development.

**Lakefront Park, Kissimmee, FL**

The proposed design strengthens the connection between two halves of an existing park, by enlivening the space with an interactive fountain and a larger, more useable green space. Mike was the senior designer from master plan through schematic design.

**Losner Park, Homestead, FL**

Two acre urban green space on historic Krome Avenue across from the City's first City Hall. A new elliptical event lawn is oriented toward the City's future City Hall tower on one axis, and the existing stage on the other axis. Mike was the senior designer from concept through construction documents.

**Northwood & Broadway Studies, West Palm Beach, FL**

A series of parking and site design studies and illustrations for the revitalization of this neighborhood commercial area and the highway leading to it prepared for the City's Community Redevelopment Agency. Mike was the senior designer and project manager.

**Park System and Site Plans, Pinellas County, FL**

County-wide plan for parks and trails. Individual park master plans were developed for four existing parks and one new trail. Mike was the senior designer for the park master plans and overall park system plan.

**Prior to Joining AECOM****Yorktown Master Plan, Yorktown, VA**

Master plan for the town and waterfront plan for the public / private facilities in this colonial town. Mike was the senior planner and designer.

**Freer Gallery of Art Plaza, Washington, DC**

Renaissance Revival museum on the National Mall. Plaza design was based on the interior courtyard of the museum. Mike was the senior designer from concept through construction documents.

**Soldiers & Sailors Quadrant - Public Sq., Cleveland, OH**

Civil War museum and monument in one of four quadrant parks at the center of downtown. Plazas and seatwalls were designed from the same materials as the monument, in a style and construction technique similar to the original design. Mike was the senior designer from concept through construction documents.

**Long Wharf Plaza, Boston, MA**

This historic downtown waterfront wharf and plaza functions as a gateway to the Harbor Islands with panoramic views of the harbor. Mike was responsible for the design development through construction documents.

**City Park Master Plan, Denver, CO**

Mike was the senior designer for the revitalization master plan for this passive park in the residential heart of the City.

**Lower Downtown and Auraria Pkwy., Denver, CO**

Sr. designer, master plan – construction. Streetscape design for several downtown streets and a new parkway into the City. Mike was the senior designer from concept through construction documents.



**A. Blake Drury, AICP**  
**Senior Associate, Urban Designer**

**Education**

M.S. (Planning), University of Tennessee, Knoxville, Tennessee, 1998  
 B.A. (History), Cum Laude, University of Florida, Gainesville, Florida, 1996

**Professional Registrations**

American Institute of Certified Planners (017026)

**Affiliations**

American Planning Association  
 Congress for the New Urbanism

**Awards + Honors**

Award of Merit - Florida Chapter of the American Planning Association (FAPA); Pasadena Hills Area Plan (2008)  
 Outstanding Public Study Award - Florida Planning and Zoning Association (FPZA); Pasadena Hills Area Plan (2008)  
 Frederick B. Stresau Award - Florida Chapter of the American Society of Landscape Architects (FLASLA); City of St Pete Beach Master Plan (2004)  
 Award of Excellence - CNU Charter Awards; Sarasota 2050 (2003)

**Presentations**

"Urban Design for Transit," Pennsylvania Public Transportation Association Annual Conference, April 2009  
 "Codes on the Road," Orlando-Metro Section - American Planning Association, June 2009

**Lectures + Instruction**

Adjunct Instructor, University of Central Florida; Urban Design (PAD 5337) and (PAD 4334); Fall 2007 to Present  
 "The Lateral Approach - Linking Transportation and Urban Design," Texas A&M University, April 2008

**Professional History**

2009 - Present  
 Design + Planning at AECOM  
 Urban Designer

2000 - 2009  
 Glatting Jackson Kercher Anglin, Inc.  
 Urban Designer

1998 - 2000  
 Chattanooga-Hamilton County Regional Planning Agency  
 Senior Planner

Blake Drury is a planner and urban designer focused on creating livable communities through design projects of all scales, from single block urban interventions to new towns and neighborhoods. His varied background, which includes stints as a public sector designer, a private development planner, and urban designer, allows him to be a valuable asset on a range of project types. He has worked for a both public-sector and private-sector clients in urban settings across North America, including initiation, conceptualization, and design of large-scale neighborhood redevelopment projects, downtown plans, and numerous transit station area planning programs. Blake also has extensive experience helping private-sector clients develop visions and principles to guide new communities. As part of this work, he has developed masterplans for many traditional neighborhood development design projects throughout the southeast United States.

**Project Experience - Transit-Oriented Development**

**Lynx Blue Line LRT Extension - Sugar Creek/NCRR Alignment Alternatives Study, Charlotte, NC**

As project manager and chief urban designer, Blake led the study of two alignment alternatives and four station area concept plans to inform the selection of a preferred alignment. The process refined each alternative alignment and associated station locations, described the current and anticipated future real estate market conditions, developed a land use and transportation vision for the station areas and North Tryon Street in each alternative, and evaluated the associated costs and benefits of each alternative.

**Mount Joy Main Street and Station Area Plan, Mount Joy, PA**

Blake led project conceptualization and was the lead urban designer for a joint plan for Main Street and a new Amtrak station for Mount Joy borough. The plan, commissioned by PennDOT for Main Street Mount Joy, involved development

of a shared vision for Main Street, clear market positioning and branding for Main Street, improvements to the public realm on Main Street and adjoining streets, and upgrades to the physical environment in and around the station.

#### **Lynx Blue Line LRT Extension - Urban Design Framework, Charlotte, NC**

As part of the Station Area Planning effort, Blake led the development of an Urban Design Framework for the LYNX Blue Line LRT extension in Charlotte's Northeast Corridor. Based on the corridor's physical characteristics and the potential visibility and adjacency issues of the LRT line, the framework recommendations guide the design of the different transit components such as track, bridges, fencing, catenary system, and utilities.

#### **Project Experience - Urban Regeneration**

##### **Smart Growth Pilot Program, Baton Rouge, LA**

Blake was the project manager in charge of developing a Pilot Program for Plan Baton Rouge to outline smart approaches to development appropriate to the City's context. The program used plans for key sites within the City to illustrate strategies for urban infill development, neighborhood infill, commercial strip redevelopment, and new mixed-use greenfield developments.

##### **South Waterfront Masterplan, Knoxville, TN**

Blake was the project manager for the transportation planning element the South Waterfront Vision Plan. This effort, which is guiding the revitalization of the south side of the Tennessee River as it flows through Downtown Knoxville.

##### **Newton Town Centre Plan, Surrey, BC**

Blake led the urban design of the town centre development plans for the City of Surrey, a rapidly-growing area in the Vancouver region's South of Fraser area. The coordinated plan articulates immediate and long-term actions for both the land use and transit infrastructure in guiding the future of the Town Centre into higher density and walkable, mixed-use vibrant and safe TOD.

##### **Independence Boulevard Area Plan, Charlotte, NC**

Blake was the project manager leading the creation of a vision for a new future for the 10-square mile Independence Boulevard Growth Corridor through the development of sustainable land use and transportation scenarios. The plan recommended land use and transportation visions and strategies to reverse the trend of disinvestment, position the

corridor for growth, and reinforce existing neighborhoods for continued stability and livability.

#### **Downtown Temple Terrace Redevelopment Plan, Temple Terrace, FL**

Blake was project manager and lead urban designer for the engaged by Unicorp National Developments to create a master plan and public space landscape concept for a new downtown for Temple Terrace, a city of 23,000 on the Hillsborough River north of Tampa.

#### **Project Experience - Masterplanning**

##### **Pasadena Hills Area Plan, Pasco County, FL**

Blake led the development of the vision and the creation and analysis of urban design concepts for this area of 34 square miles north of Tampa, Florida. The plan was undertaken as a partnership among the County, the major landowners within the study area, and the community. With a 50-year horizon, the plan integrates land use and transportation in a manner that works for long-term mobility, provides a logical extension of urban uses and successfully transitions to existing rural neighborhoods, provides a "smart growth" approach to accommodate additional growth and new development in a sustainable form.

##### **Creekside Park at The Woodlands, Harris County, TX**

Blake led project conceptualization and urban design assisting the Woodlands Development Company to develop the master plan for Creekside Park, the seventh and final village in the landmark Woodlands new town. The plan, which reversed previous concepts that relied on privatized amenities and multi-lane arterials that severed the community fabric, features a linear promenade with significant public edges connects the village center with the major community park, neighborhoods, and the existing creek and major open space system.

##### **Tampa Heights, Tampa, FL**

Blake developed neighborhood master plans guiding private efforts to redevelop nearly 40-acres of downtown Tampa into a vibrant urban neighborhood. The plan calls for a mixed-income neighborhood, with a variety of housing that is oriented towards vistas of the Hillsborough River and Tampa's downtown skyline. The neighborhood broke ground in December 2008 with first phase development and property remediation.



**Jonathan Mugmon**  
Senior Associate, Wayfinding

#### Education

Master of Fine Arts, Graphic Design, East Carolina University, Greenville, North Carolina (1997)  
Bachelor of Fine Arts, Graphic Design, University of Central Florida, Orlando, Florida (1995)

#### Professional Registrations

SEGD Society of Environmental Graphic Design  
AIGA American Institute of Graphic Artists  
ESRI GIS Certification

#### Publications + Technical Papers

National Parks & Recreation Assoc. - National Conference 2009  
ASLA – Florida State Conference - 2006  
Arabian Business Magazine - May 2008  
National Scenic Byway Conference – 2007

#### Professional History

2009 – Present  
Design + Planning at AECOM  
Director of Wayfinding/Environmental Graphics

1998– 2009  
Glattig Jackson Kercher Anglin, Inc.  
Director of Wayfinding/Environmental Graphics

1997-1998  
School of Art, University of Central Florida  
Associate Professor

Jonathan Mugmon, SEGD, is a Senior Associate and Environmental Graphic Designer. Jonathan directs the Wayfinding Practice at Design + Planning's Orlando office. He has worked in a variety of wayfinding contexts including:

- Municipal
- Main Streets and Urban Areas,
- Institutional and Educational Campuses
- Public Parks and Trails
- Scenic Highways
- National Historic Sites

Jonathan has over twelve years experience in development of wayfinding systems, interpretive planning and community branding. Glattig Jackson understands the need to create an environment that engages the public. Our wayfinding systems and environmental graphics will engage, direct, inform and enhance one's experience in a manner that reinforces the aesthetics and goals of your project. We will create a design that communicates direct and effective information for circulation and wayfinding and enhances placemaking.

Current or recent wayfinding work includes the Orlando Heath Downtown Campus and City of Orlando Downtown, University of Central Florida, Miami-Dade County Parks and Trails, A1A National Scenic & Historic Coastal Byway, Cape Girardeau, MO, Bluffton, SC, Mount Joy, PA, Boatswains Beach, Grand Cayman BWI and Orange County Convention Center.

#### Project Experience

##### City of Bradenton – Wayfinding

Jonathan served as Project Manager and Senior Designer for the coastal community wayfinding project. As the municipal seat of Manatee County and a historic coastal community with a vibrant downtown, Bradenton has many visitors daily.

In an effort to educate visitors to stay and enjoy the amenities of this wonderful city a wayfinding system was designed to guide pedestrians and vehicles to many top destinations. Jonathan managed coordination with the FDOT and FHWA and gained approvals for implementation for design and fabrication of this vital sign program which aides visitors navigate the community.

#### **Downtown Orlando - Wayfinding**

Jonathan served as Project Manager and Senior Designer on the Orlando Wayfinding Project. Downtown Orlando is undergoing major redevelopment with a number of residential, commercial and event venues planned. With the tremendous amount of developments planned and the growth of downtown residents and workers, the volume of traffic will soon create overwhelming wayfinding challenges for Downtown Orlando. AECOM designed a functional, creative and flexible system of signage to provide clear access to Downtown Orlando's many destinations. In the last year the city underwent a comprehensive study with the goal of analyzing these wayfinding challenges and proposing a cohesive and implementable solution that will respond to the downtown's growth. The designs on this page represent some of the results of the study and recommendations for a complete wayfinding system for Downtown Orlando.

#### **University of Central Florida Wayfinding, Orlando FL**

Senior Designer and Project Manager to design a wayfinding master plan in an effort to help enhance the visual campus branding and sense of place. Additionally, the wayfinding system shall aide visitors in finding their desired destination on campus. The university has many visitors in attendance every day. The introduction of a clear and legible wayfinding system has increased the comfort level of the visitor through the use of appropriate and well-placed signage, providing the reassurance that they are heading in the correct direction. The project included gateway, digital kiosk, vehicular and pedestrian directional signs. UCF is the largest school in Florida. As of 2009 enrollment consisted of 60,000 Students making it the third largest in the United States.

#### **Florida Southern College - Wayfinding**

Jonathan worked as Environmental Graphic Designer and Wayfinding Planner for Florida Southern College. This National Historic Register and Frank Lloyd Wright designed campus design process focused on placemaking enhancements to this downtown college campus. As part of this process AECOM assessed all pedestrian and vehicular

circulation at Florida Southern College. A plan was developed, which provides ease of access and navigation, while being specifically sensitive to tourists, visitors and those with disabilities.

#### **Orange County Convention Center - Wayfinding**

As Senior Designer and Project Manager, Jonathan worked to design a wayfinding master plan in an effort to help visitors find their desired destination. Orange County Convention Center (OCCC) is the second largest convention center in the United States attracting millions of visitors annually. As the destinations are separated into several buildings on a large campus wayfinding success is imperative. Vehicular directional wayfinding signs must convey clear and effective information at the right time to be effective. A proven way to clearly communicate information to a variety of culturally diverse users is through the use of color, icon graphics and text. By combining all of these elements the OCCC can create consistency in message and display. From the entry access nodes when a visitor approaches the convention center district the signs establish a user expectation. The user sees the right message presented at the right time. This type of clear communication creates a level of comfort for visitors who typically are not sure of where to go. The system designed includes several citrus themed digital message gateways which display the convention events, vehicular, parking and pedestrian directional signs.

#### **Pedro St. James – National Historic Campus – Wayfinding**

Serving as Project Manager and Senior Designer Jonathan provided research and design services for this national historic site located in Grand Cayman, British West Indies. Pedro St. James is the site of several historic events on Grand Cayman including announcement of emancipation of slavery and independence from British rule. AECOM created a gateway, vehicular and pedestrian directional signs for visitors to better navigate and access the facility and gardens. As part of the project we created over twenty interpretive signs educating the visitors of the rich history of the buildings, site, and the rich cultural history of the native Caymanian people. We performed detailed research for the Pedro St James educational display. This research included coordination with the National Archives and Historical Libraries of Grand Cayman, Cuba, Jamaica, and Great Britain. These efforts procured the appropriate graphic images to convey the concepts for each sign.



**Ryan P. Cambridge**  
Landscape Designer

#### Education

Bachelors of Science in Landscape Architecture, Honors  
Minor in Art & Design  
Purdue University, 2009

#### Accreditation

Certified LiveRoof® Modular Green Roof Installer

#### Affiliations

Associate Member (2010) American Society of Landscape Architecture

Founding President, the Boiler Green Initiative (2006-2007)(2008-2009)

#### Awards + Honors

University Olmsted Scholar, Landscape Architecture Foundation, 2009

Award of Merit, The Honor Society of Agriculture, 2009

Student Honor Award, American Society of Landscape Architecture, 2008

#### Professional History

2009 – Present  
Design + Planning at AECOM  
Landscape Designer

2007-2008  
Glatting Jackson Kercher Anglin Inc.  
Landscape Designer

2004-2008  
RPCA LLC.  
Landscape Design Consultant/Contractor

Throughout his scholastic career Ryan was recognized as a leader both in and out of the classroom. As part of Purdue's program, Ryan completed a year-long professional co-op with Glatting Jackson Kercher Anglin Inc., in that allowed for a significant amount of pre-professional project exposure. Additional scholastic accomplishments include:

- Department of Horticulture and Landscape Architecture Outstanding Senior, 2009
- College of Agriculture Research Symposium, First Place, 2009
- Henry W. Gilbert Award of Merit Nominee, 2008
- Founded Purdue University's first sustainability-focused student organization, 2006

Ryan's background in sustainable design/planning has been the cornerstone for his professional tenure with the belief that the integration of sustainability at the environmental, infrastructural, and economical levels of design are prerequisite to the long-term success of any project.

Ryan's professional exposure is broad with representative projects ranging from high-end residential design to parks system master planning. In addition, Ryan is able to compliment any project team with his extensive knowledge of professional software including: Adobe Creative Suite 4, AutoCAD 9, ArcGIS 9, SketchUp 7, Microsoft Office, and can operate in both a Mac or PC environment.

#### Project Experience

##### **City of Norfolk Parks and Recreation Master Plan, Norfolk, VA**

The focus of the plan is to not only improve recreation and leisure resources throughout the City, but to establish a framework that will serve as a planning and development

guideline for the next ten (10+) years. Ryan participated in many of the major components of the Plan which include: a City-Wide Population/ Demographic Analysis; a Needs and Priorities Assessment that included public workshops, focus group interviews, a City-Wide Boat Ramp Assessment, and five-tiered Level of Service (LOS) Analysis. The information gained from our analysis techniques allowed us to create a tailored Parks System Vision Plan and a Cost Estimate and Implementation Strategy.

#### **City of Sunrise Needs Assessment, Sunrise, FL**

Located in south Florida, Sunrise was born out of the sprawling suburban network of Miami-Dade County only 50 years ago. Now, in an effort to continue to provide high quality recreational opportunities for their residents, we were asked to perform a comprehensive parks and recreation needs assessment for the City. This report will help to help guide the development of the Sunrise parks system over the next 10 years. For this project, Ryan led the team in the development of the needs assessment report; analysis documents; and participated in client/public facilitation and project management.

#### **Rodda Family Plaza at Florida Southern College, Lakeland, FL**

Located within the largest collection of existing Frank Lloyd Wright architecture in the world, Rodda Family Plaza (formerly Ordway Gardens) is an excellent example of a historically respectful and yet adequately modern retro-fit landscape. For this project, Ryan acted as a lead designer and worked with the college board of directors, the contractor/donor, and a FLLW historian to develop a plan that paid homage to Wright's original, but unrealized, vision for this civic space. Design development documents were drafted and the project opened in 2008.

#### **Thompson Estate Landscape Plan, Ocala, FL**

In 2007 Jay Thompson, the Division President of Pulte Homes, asked for help in the complete redesign of his central Florida estate. The client wanted an authentic and equally elegant Tuscan landscape. Ryan acted as a lead designer for this project, working directly with the client to develop both landscape and hardscape plans that far exceeded the original expectations. Construction commenced during the spring of 2008 where Ryan also participated in construction administration throughout the realization process.

#### **The Schleman Hall Green Roof at Purdue University, West Lafayette, IN**

In 2006, Ryan founded the non-profit group the Boiler Green Initiative at Purdue University. In 2008, Ryan wrote and subsequently received a grant to design and install Purdue's *first* green roof. This student-driven project was designed to act as both a sustainable environmental system as well as an accessible learning environment for the campus. Ryan was certified by the product manufacturer to lead the design and installation of the roof/terrace and worked intricately with Office of the University Architect to see the project successfully completed during the spring of 2009. A myriad of data collection equipment integrated within the roof continues to monitor the system's long-term success.

#### **University of Central Florida Medical College Landscape Master Plan, Orlando, FL**

The heart of Orlando's new Medical City at Lake Nona is the new UCF Medical School. This project has been the catalyst for hundreds of millions of dollars of investment in the Southeast Orlando area. We prepared the Landscape Master Plan for the new University of Central Florida Health Sciences Campus at Lake Nona to create a campus which is comfortable, memorable and sustainable. On this project Ryan worked on the hardscape design, 3D modelling, and cost estimating.

#### **Common Ground Park Master Plan, Lakeland, FL**

Common Ground Park was designed to be a creative, fun, and completely inclusive play environment where people of every age and ability have the opportunity to explore and discover themselves and their friends in the community (see LASN October, 2009). For this project Ryan participated in the conceptual/schematic design process and the production of design development documents.

#### **Lake Eva Park Master Plan, Haines City, FL**

The redevelopment of Haines City's Lake Eva Community Park has created a signature park space within the heart of the City and of Polk County. The use of the existing 29-acre park was limited by aging facilities and numerous roads bisecting the park. The proposed plan better unifies the park and, increases sustainability, and maximizes the use of the beautiful lakefront property with expanded recreational opportunities. Ryan worked mainly on designing multiple; themed play areas within the park.



**Jay H. Exum, Ph.D.**  
Principal

#### Education

Doctor of Philosophy, Wildlife Ecology, Auburn University, Auburn, AL (1985)  
Master of Science, Wildlife Biology, University of Tennessee, Knoxville, TN (1981)  
Bachelor of Arts, Zoology, University of Tennessee, Knoxville, TN (1978)

#### Accreditation

LEED® AP

#### Affiliations

American Ornithologists Union  
Society for Conservation Biologists  
Society for Wetland Scientists  
The Wildlife Society

#### Professional History

2009 – Present  
Design + Planning at AECOM  
Principal

1996 - 2009  
Glatting Jackson Kercher Anglin  
Principal, Director of Environmental Services at

1985 – 1995  
Breedlove, Dennis & Associates, Inc.  
Vice President and Senior Scientist

#### Expertise

Wildlife ecology  
Wetland ecology  
Environmental policy  
Federal and state wetland jurisdictional delineations  
Natural resource evaluations within southeastern states  
Threatened and endangered species analyses and management  
Mitigation design  
Environmental permitting

Dr. Exum also has been crucial in facilitation of policy decisions including Comprehensive Plans for counties, and regional conservation strategies for natural resource agencies. Dr. Exum has given expert witness testimony for litigation on conservation planning, threatened and

endangered species habitat, wetland issues and environmental permitting.

#### Project Experience

##### **Lake Hancock Land Use and Resource Management Plan, Southwest Florida Water Management District (SWFWMD), Brooksville, FL**

Dr. Exum led a team of ecologists, GIS specialists, and recreation planners to develop a natural resource management and recreation plan for conservation lands around Lake Hancock in Polk County, Florida. This assessment involved coordination with resource agency personnel, environmental groups and local governments in the vicinity. Dr. Exum mapped historic communities, and created a detailed, long-term natural resource management plan which specifically defined Desired Future Conditions for a 50-year vision. The team conducted a recreation needs assessment which included interviews, baseline assessments of existing facilities, and a demographic analysis for the region. Dr. Exum presented the final Natural Resource and Recreation Management Plan to the Governing Board of the SWFWMD and to the Polk County Board of County Commissioners. The Plan provides details for short-term management actions and provides the framework for a long-term vision for conservation around the Lake.

##### **Osceola County Conservation Planning, Osceola County Parks and Recreation Dept. Osceola County, FL**

Dr. Exum has represented Osceola County on the creation of a conservation strategy for dozens of thousands of acres around Lake Toho, and created natural resource management plans for the major drainage basins within the County. Our work began with the facilitation of a technical working group in order to create Development Order conditions for six large-scale development projects in the northeastern portion of Osceola County. These criteria set

the stage for conservation of significant natural resources, protection of Lake Toho, and strategies for conserving listed species including the federally-endangered snail kite and dozens of bald eagle nests which occur around the lake. We crafted Comprehensive Plan amendments and details for a Smart Code for mixed-use development. In addition, we prepared specific natural resource management plans for three tracts for which resource-based recreation and ecological restoration are proposed.

#### **Natural Resource Planning, Suwannee River Water Management District (SRWMD), Live Oak, FL**

Dr. Exum has represented the SRWMD for more than a decade. His initial work included the development of a comprehensive resource-based plan for recreation across District lands. This plan included methodology for determining whether a proposed recreation activity was appropriate, and for assessing when these activities would cause irreparable impact to the environment. Since that time, baseline monitoring has been conducted, an environmental management system has been established, and a review of the environmental impacts from specific activities has been conducted. Dr. Exum prepared a comprehensive strategy for conservation of seven large springs that included recommendations for enhancing natural habitat, long-term measures for improving water quality, and an assessment of compatible resource-based recreation. Dr. Exum helped obtain funding for restoration of the wiregrass understory in a rejuvenated longleaf pine ecosystem as a part of a carbon sequestration off-set project.

#### **Environmental Planning and Permitting for the Reunion Development, Ginn Development Company, Osceola County, FL**

Dr. Exum prepared a conservation strategy for the Reunion Development in Central Florida. This project was a Development of Regional Impact (DRI) that required an extensive ecological assessment prior to creating a master plan for the project. Dr. Exum led biological assessments and listed species surveys, presented the master plan to a diverse audience, and led permitting efforts with state and federal regulatory agencies. Since the project contained habitat for the federally-listed sand skink, a conservation strategy was developed that included long-term restoration of scrub habitat on-site, as well as monitoring of sand skink populations over time. The project required a Biological Opinion from the U.S. Fish and Wildlife Service, and a permit from the US Army Corps of Engineers for impacts to sand

skink habitat impact, and 120 acres of scrub restoration and management. The conservation areas have been managed for resource protection, and also provide passive recreation for guests.

#### **Wildlife Habitat Protection Program, Pasco County Board of County Commissioners, Pasco County, FL**

Dr. Exum helped Pasco County staff prepare a comprehensive strategy for the conservation of wildlife habitat in the County. This work concluded with a report that specified Critical Linkages, Ecological Planning Units, and a large Agricultural Reserve which is intended to provide a long-term strategy for conservation planning in Pasco County. The report made recommendations including a voter referendum for land acquisition, changes in the Comprehensive Plan, and the establishment of an environmental lands acquisition and selection committee. Dr. Exum continued to represent the County through presentations to the Board of County Commissioners (BOCC) and the creation of draft language for the referendum, which was approved. The referendum for funding land acquisition was approved by residents and a 40 million dollar fund for land acquisition was established. Dr. Exum helped the environmental lands acquisition selection committee identify priorities for conservation of natural lands across the County. Since that time several of these tracts have been purchased for long-term conservation.

#### **Coordination of the Lake Toho Environmental Working Group, Osceola County, FL, Client: East Central Florida Regional Planning Council (ECFRPC), Orlando, FL**

Six large-scale developments were proposed east of Lake Tohopekaliga in northern Osceola County. Because of the magnitude of potential impacts, the U.S. Army Corps of Engineers and the ECFRPC requested that all six developers coordinate the review of potential environmental impacts. Dr. Exum was hired by the ECFRPC to facilitate the Lake Toho Environmental Working Group in the review of these development projects and the future network of roads that would serve them. Dr. Exum convened numerous workshops to assess the potential for impacts, created design alternatives to minimize impacts, and created a cohesive plan for all six large-scale developments. The Working Group consisted of environmental groups, natural resource agencies, multiple county staff, and representatives from each developer. As a result of the Working Group, a consensus Development Order was prepared that was approved by all the counties of the ECFRPC, the developers, natural resource agencies and environmental groups.

### **Strategic Plan Facilitation**

Dr. Exum is frequently asked to preside over technical groups charged with developing long-term strategic plans. As chairman of the advisory board for the Forestry Wildlife and Fisheries Department at the University of Tennessee, Dr. Exum worked closely with the chairman of the department and the advisory board to comment on the Department's five-year strategic plan. He has also facilitated a review with recommendations for streamlining and improving the approach. As President of the Florida Chapter of the Wildlife Society, Dr. Exum facilitated the five-year strategic plan through meetings with the executive board and through workshops with all the members of the professional organization. Dr. Exum presided over the scientific subcommittee charged with defining the technical aspects of the Gopher Tortoise Management Plan that was recently approved by the Florida Fish and Wildlife Conservation Commission.

### **Creation of the Ecological Resource System, Sarasota County Board of County Commissioners (BOCC), Sarasota, FL**

Dr. Exum served as the principal in charge of the ecological tasks associated with the Sarasota 2050 planning process. His work involved supervision of Geographic Information Systems (GIS) data collection, targeted fieldwork to assess conservation lands, and the facilitation of technical working groups related to land use and management in the County. Dr. Exum proposed a series of protection zones intended to protect the core reserves associated with the Myakka River, primary ecological linkages that were connected to this core, and buffers that would minimize the effects of adjacent urbanization, and allow long-term management. The Ecological Resource System (ERS) was reviewed during extensive public workshops, and discussed at length with the Sarasota BOCC. The conservation strategy imbedded in the ERS is a fundamental component of the Sarasota 2050 Plan.

### **Expert Witness Testimony, Various Counties, FL**

Dr. Exum has been retained to provide expert witness testimony associated with land use and natural resources in Florida. He successfully supported Volusia County on a case involving the federally-listed Florida Scrub-jay and a proposed development. Dr. Exum also supported Sarasota County in the appeal of Comprehensive Plan Amendments associated with the Ecological Resources System he had created for the Sarasota 2050 Plan. His testimony upheld

the conservation strategy that was proposed within the Comprehensive Plan. In Brevard County, Dr. Exum provided testimony during the judge administered trial as to the effects of the wetlands and Florida Scrub-jays on the developability of numerous parcels owned by Farm and Grove Realty. The County's positions on these issues were upheld. Dr. Exum has also provided expert witness testimony related to wetland jurisdictional determinations, wetland function, and wetland hydrology.

### **Open Space Plan, City of Aiken, SC**

Dr. Exum participated as principal ecologist in the development of a comprehensive open space plan for the City. During the planning process, seven predominant types of open space were identified. These included: natural lands, agricultural lands, equestrian lands, historic and cultural resources, parks, civic spaces, roadways and trails. Dr. Exum facilitated meetings with stakeholders, the open space advisory board, and the public in order to prepare an implementation for each of these types of open space along with a map depicting its highlights. A comprehensive strategy for connecting all of these open spaces was developed and a vision for long-term open space was developed. Specific recommendations were made with respect to the administrative support needed to implement the plan, Comprehensive Plan and Land Development Code changes. Detailed recommendations were provided for implementing each of the seven open space elements in a final report submitted to the City in December 2009.

### **Cayman Island Turtle Farm**

The Cayman Island Turtle Farm (CITF) hired AECOM planners and ecologists to create an expanded tourist destination and evaluate the ecological impacts of their ongoing operations. Dr. Jay Exum led a team of ecologists from the University of Florida in an assessment of the impacts of the discharge of effluent from the turtle farming operations on the near shore reef in the Caribbean. Our assessment included quantitative sampling, water quality assessments, and an evaluation of vertebrate and invertebrate fauna in the vicinity of the effluent discharge. Our results showed a relatively narrow zone of impact to the reef given the high energy wave action associated with this portion of the island. We provided recommendations to the turtle farm to minimize these impacts and improve the efficiency of the operation to reduce the quantity of effluent.

## Lori A. Baer

### Associate Vice President

#### Academic Training

BA, Florida State University, Tallahassee 1977

#### Experience

With AECOM: 2.5

Other: 29

For 30 years, Ms. Baer has served government and industry with her extensive knowledge and diverse capabilities. Formerly executive director at South Florida's Port of Palm Beach and executive staff member of the Port of Miami and American Association of Port Authorities (AAPA), Ms. Baer plays an integral role in clients' achievement of critical objectives in environment, transportation, land-use, waterfront redevelopment and security disciplines, specializing in consensus-building through communications and community and industry relations efforts.

Ms. Baer served the AAPA, which represents 160 port authorities throughout the Western Hemisphere, as director of communications and the Port of Miami, with the dual distinctions of Cargo Hub of the Americas and Cruise Capital of the World, as director of community and industry relations.

In her consulting career, she has developed port, cruise and transportation planning projects and performed market analyses and feasibility studies in addition to serving as a trusted bridge between the port industry and community stakeholders, and federal, regional, state and local entities, including the Corps of Engineers, Homeland Security, metropolitan planning organizations and environmental regulatory agencies. She is widely acknowledged for her ability to proactively build consensus at the highest levels and secure funding for crucial projects, ensuring the efficient, cost-effective sharing of resources in a sustainable manner while advancing development of leading-edge facilities to serve industry and community needs for generations to come.

Ms. Baer conducted the Broward County (Florida) Metropolitan Planning Organization's first freight and goods movement study, and she carried out the first port security plans under Florida Statute 311.12, for the Port of Key West and Port of Palm Beach.

#### Various Projects, Port of Palm Beach, Riviera Beach, Florida.

While serving as executive director of Port of Palm Beach, a diverse hub of Caribbean region commerce, presided over the first "new start" harbor deepening and widening study in 10 years in conjunction with the U.S. Army Corps of Engineers – a \$2 million, three-year study that was approved and funded through the efforts of the executive director, who oversaw all stakeholder and public meetings. Under her leadership, the Port launched plans for Florida's first inland port, designed to serve five ports in Florida and connecting each by road and rail, with the concept developed, conveyed to and support gained from a wide range of communities, economic development interests, land owners, the governor of Florida and the shipping industry. Plans call for its development on 3,000 acres in Western Palm Beach County, an economically distressed region that will gain hundreds of well paying jobs for non-college-educated regional workers.

#### Port Everglades Master/Vision Plan, Broward County, Florida.

As a Project Manager of the team implementing the Master/Vision Plan at Broward County's Port Everglades, is engaged in prioritizing projects, assisting with identification of funding opportunities and conducting industry and public stakeholder meetings, working with port tenants and operators to develop a seamless phasing to maintain port operations throughout implementation of the Plan. AECOM has completed a master plan which has been approved by the Broward County Board of Commissioners and adopted into the State of Florida Comprehensive Plan. The plan covers all aspects of Port Everglades operations, from containerized cargo to handling of liquid bulk to state-of-the-industry cruise facilities.

#### Port of Pascagoula Strategic Plan Update, Pascagoula, Mississippi.

As project director, led development of an update focusing on port-owned operations, as well as those that are leased to tenants, to make recommendations for infrastructure needs for the next five to 10 years. The team also reviewed road and rail connectors throughout the region and, in conjunction with federal stimulus grant opportunities, considered possible container operations, container-on-barge operations, and/or short-sea ferry service.

**Pelican Island Container Terminal Conceptual Plan, Houston and Galveston, Texas.** As project director, engaged in a comprehensive study exploring the potential for development of a major new container port to serve the region in 2020 and beyond. A joint project of the Port of Galveston and Port of Houston Authority, the study entails careful review of current land uses, such as for a university campus and Sea Wolf Park, and seek to integrate such uses with commercial port development. The AECOM study team will review geotechnical and environmental factors, utilities needs and viability for development of road and rail access, bridge connection options, dredging requirements and industry response to a major new containerized cargo facility.

**Port of Pensacola On-Port Land-Use Redesign, Pensacola, Florida.** Project director for an on-port land-use redesign for the Port of Pensacola, working in tandem with the City's Community Redevelopment Authority as they proceed with redevelopment of the city's downtown area, including the port, as pedestrian friendly while ensuring public access to the waterfront. Work includes spearheading stakeholder outreach, which seeks to accomplish economic stimulation for the people of Pensacola, continued working port activities for Port of Pensacola, and be aesthetically integrated and compatible with the residential, commercial, touristic, historical and recreational development within a three-square-mile area.

## Claude E. (Gene) Boles, Jr.

## FAICP

Gene Boles' professional credentials reflect a diversity of work experience and a mastery of urban planning disciplines and skills. His management abilities and technical competence are demonstrated through his record as a planning director and as a private consultant and through an extensive list of projects undertaken during thirty seven years of professional practice. Mr. Boles was inducted into the College of Fellows of the American Institute of Certified Planners (FAICP) in April 2008.

### AREAS OF EMPHASIS

**Growth Management:** Experience in the formulation and implementation of growth management plans and policies. Supervised a comprehensive review of growth management techniques and policies for Hillsborough County and the establishment of a community-based planning program. Active participant in the formulation of urban service area policies, uniform utility extension policies, transportation investment policy and agricultural preservation guidelines. Initiated and implemented growth management concepts in Springfield, Missouri including delineation of an urban services boundary and the establishment of the Greene County Watershed Task Force. Member of staff/ consultant team formulating Oklahoma City Comprehensive Growth Management Plan.

**Planning Organization and Management:** Progressive experience in the management of public planning organizations. As Director, Planning & Growth Management Department for Hillsborough County, FL, supervised the consolidation of three departments and managed 210 professional and technical staff. As Director, Community Development Department, Springfield, Missouri, restored the effectiveness of a discredited planning program. As Head, Planning Division in Oklahoma City, OK, reported to the Planning Director and supervised a team of 15 professionals.

**Environmental Planning:** Experience in environmental analysis, planning and policy development, urban stormwater management, water-land linkage and the application of environmental planning techniques to large scale development and to comprehensive planning for high growth areas.

**Development Regulations:** Experience in the formulation, administration and enforcement of land development and environmental regulations with an emphasis on multi-jurisdictional review and regulatory streamlining. Supervised review and adoption of Hillsborough County Land Development Code in 1992, a major streamlining revision in 1995 and a comprehensive update in 1999. Supervised major revisions of the Springfield, Missouri and Oklahoma City land development codes. Thorough knowledge of regulatory techniques including Developments of Regional Impact, concurrency management, planned unit development, incentive and performance zoning, traditional neighborhood development, transit-oriented development, urban conservation districts, historic preservation districts, environmental preservation and landscaping regulation.

### Other Areas of Expertise:

- New Urbanism
- Sustainable Development
- Transportation Planning
- Project Design & Management
- Visioning
- Smart Growth
- Comprehensive Planning
- Land Planning & Design
- GIS Applications

## EXPERIENCE

**Center for Building Better Communities, Department of Urban & Regional Planning  
University of Florida, Gainesville, FL  
Director / Senior Fellow • April 2002 to Present**

Outreach program directed to the training of Florida planning officials and the building of planning capacity within small communities. Development of best practices guides pertaining to planning and growth management in Florida

**Boles Consulting, Inc, Gainesville, FL  
Principal • October 1999 to 2009**

Urban planning consultation specializing in sustainable development, community design, growth management and environmental policy.

**Planning & Growth Management Department, Hillsborough County, FL  
Community Planning Advisor • October 1998 to September 1999**

Executive supervision of community-based planning program and special projects including community design guidelines ( a comprehensive revision of the land development codes ), six community/ neighborhood design projects, the water-land linkage initiative (liaison with the Southwest Florida Water Management District), and technical support to the Hillsborough County School District and the Tampa Bay Regional Planning Council. Special emphasis on community participation and education including media and internet applications. *Leadership 2000 Award: Governor's Council for a Sustainable Florida.*

**Planning & Growth Management Department, Hillsborough County, FL  
Director • July 1991 to September 1998**

Consolidated three departments. Organization included community-based planning, transportation planning, ecosystems management, zoning administration, development permitting and building code administration. Designated as Sustainable Community Demonstration Project by Florida Dept of Community Affairs (joint designee with the City of Tampa )

**Boles & Associates, Inc., Springfield, MO  
Principal • April 1985 to July 1991**

Consolidated three departments. Organization included community-based planning, transportation planning, ecosystems management, zoning administration, development permitting and building code administration. Designated as Sustainable Community Demonstration Project by Florida Dept of Community Affairs (joint designee with the City of Tampa )

**Community Development Department, Springfield, MO  
Director • August 1979 to March 1985**

Comprehensive planning and economic development activities including land use planning, economic development, environmental policy, transportation planning, mass transit planning, urban conservation, neighborhood conservation, commercial revitalization, historic preservation, capital improvements programming, zoning and subdivision regulation.

**Community Development Department, Oklahoma City, OK  
Head, Planning Division • December 1975 to August 1979**

Long-range planning including revision and implementation of the comprehensive plan, growth management policy, zoning and subdivision codes, neighborhood planning and environmental policy. Senior member of OKC Comprehensive Growth Management Plan team.

Team Plan, Inc., West Palm Beach, FL  
Gene Boles Associates, Columbia, SC  
South Carolina Division of Administration, Columbia, SC  
Engineer & Installations Division, Berlin Brigade, US Army, Berlin, Germany  
Mayes, Sudderth & Etheredge, Consulting Engineers/ Planners, Atlanta, GA  
Southern Railroad, Co-Op Student  
US Army Missile Command, Redstone Arsenal, Co-Op Student

**PROFESSIONAL AFFILIATIONS**

- College of Fellows, American Institute of Certified Planners (Inducted April, 2008)
- Adjunct Faculty, Department of Urban & Regional Planning, University of Florida
- Charter Member, American Institute of Certified Planners (AICP)
- Professional Engineer (PE), Registered in State of South Carolina (not active)
- Professional Engineer (PE) , Registered in State of Florida (not active)
- Adjunct Faculty, School of Architecture and Community Design, University of South Florida (past)
- Senior Fellow, FAU / FIU Joint Center for Environmental & Urban Problems (past)
- Member, The Seaside Institute (past)
- Member, Congress for the New Urbanism (past)
- Vice President, Missouri State Chapter, American Planning Association (past)
- Developers Advisory Council, Missouri Department of Highways and Transportation (past)
- Adjunct Faculty, Geosciences Department, SW Missouri State University (past)
- Advisory Committee, Hammons School of Architecture, Drury College (past)
- Board of Directors, Missouri Tax Increment Financing Association (past)
- Board of Directors, Downtown Springfield Association (past)
- Trustee, Springfield / Greene County Library Board (past)
- REALTOR, Licensed Real Estate Broker, State of Missouri (not active)

**EDUCATION**

- Auburn University: Bachelor of Civil Engineering (1966)
- Georgia Institute of Technology:
  - Master of City Planning (1969)
  - Master of Science in Transportation (1969)
- Phi Kappa Phi
- Omicron Delta Kappa
- Tau Beta Pi
- Chi Epsilon
- Outstanding Civil Engineering Graduate: Auburn University/ 1966
- Outstanding Engineering Graduate: Auburn University/ Spring 1966
- Distinguished Military Graduate, Army ROTC, Auburn University
- American Legion ROTC Award
- Society of American Military Engineers Award (National)
- Richard King Mellon Foundation Fellowship
- National Science Foundation Fellowship

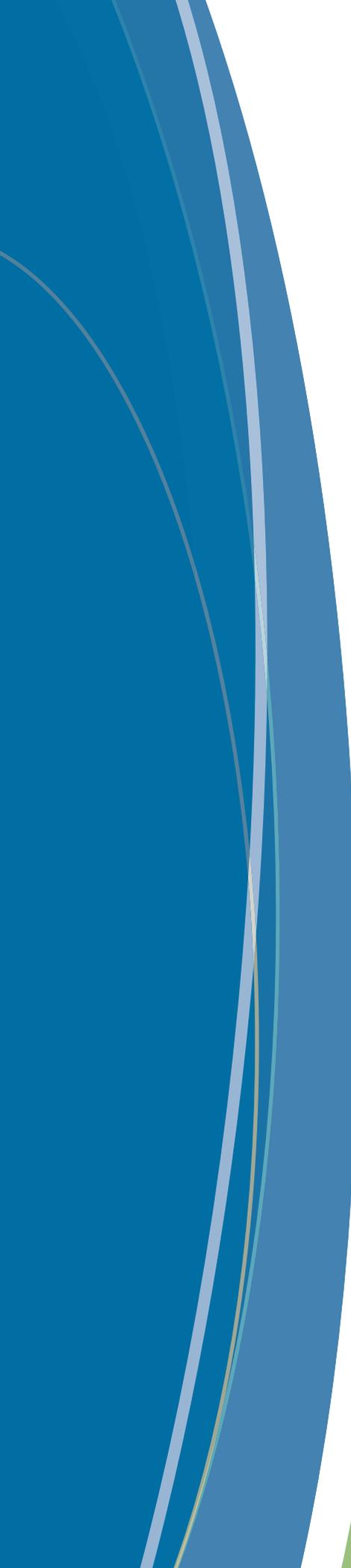
## MILITARY SERVICE

- Army ROTC, Auburn University, Distinguished Military Graduate
- Commissioned 2nd LT., Corps of Engineers, US Army Reserve, June 1966
- Active Duty, October 1968 to October 1970. Assigned Berlin Brigade, Berlin, Germany
- Army Commendation Medal

## PROJECTS & PUBLICATIONS (Representative)

- St Lucie County Western Lands Study
- City of Gretna Comprehensive Plan Update
- City of Gretna Evaluation and Appraisal Report
- City of Archer Evaluation and Appraisal Report
- Florida Planning Officials Handbook (Principal Editor / Co-Author)
- Comprehensive Plan Revision, City of High Springs, 2008
- Public School Facilities Element, Hillsborough, Sarasota, St Lucie, Alachua & Walton Counties (Co-author), 2008
- Best Practices Guide for Transportation Planning in Small Florida Cities, Co Author (for FDCA)
- EAR-Based Amendments, City of West Palm Beach, 2008 (Consultation)
- EAR-Based Amendments, City of Zephyrhills, 2008
- Revision of Land Development code, City of Archer, FL
- Revision of Land Development Code, Town of Carrabelle, FL
- A Guide for the Creation and Evaluation of Transportation Concurrency Exception Areas, 2007, Co Author (for FDOT)
- Evaluation and Appraisal Report, City of Zephyrhills, 2007
- School Concurrency Database Model, Project Manager
- Best Practices for Coordinated Public School Planning, Co-Author (for FDCA)
- Establishing Level of Service Standards for Public School Concurrency, Co Author (for FDCA)
- Proportionate Share Mitigation for School Concurrency, Co Author (for FDCA)
- Model Proportionate Share Mitigation Development Agreement, Co Author (for FDCA)
- Florida Planning Officials Training Program, Coordinator and Principal Contributor
- Traditional Development Regulations, City of Zephyrhills, FL
- Impact Fee Program, City of Eagle Lake, FL
- Impact Fee Program, City of Bartow, FL
- Central Western Communities Sector Plan, Palm Beach County, FL; Project Manager
- Community-Based Planning Program, Hillsborough County, FL; Executive Supervision
- Community Design Guidelines; Executive supervision of contract with Freilich, Leitner & Carlisle
- Northwest Hillsborough Community Plan; Executive supervision of contract with Duany Plater- Zyberk
- Brandon Main Street Plan; Executive supervision of contract with HDR/ RTKL Team
- "A Strategy for Enhancing Community Diversity and Community-Sensitive Design ", a white paper supporting funding of a community-based planning program.
- Florida Sustainable Communities Demonstration Project
- "The Principles of Community Alignment and Empowerment", "Planners on Planning", edited by Bruce C. McClendon & Dr. Anthony J. Catanese
- "Environmental Permitting: A Collaborative Approach for Hillsborough County", a white paper prepared for the Environmental Roundtable
- NW Hillsborough County Water-Land Linkage Study .
- Greenways Master Plan, Hillsborough County, FL
- Hillsborough County Land Development Code Restructuring, 1995 .
- Hillsborough County Land Development Code, 1992
- Municipal Golf Course Feasibility Analysis, Springfield, MO .
- Master Plan, Branson, MO, 1990
- Link-Kirkwood Stormwater Management Study, Springfield, MO .

- Interstate Industrial Park, Springfield, MO
- Highland Springs Country Club, Springfield, MO .
- Housing Redevelopment Plan, SW Missouri State University .
- South Springfield Development Plan
- Southwest Springfield Development Plan .
- Springfield Downtown Strategy Plan .
- Springfield Enterprise Zone
- Walnut Street Urban Conservation Plan, Springfield, MO
- "Streamlining the Subdivision Process " , Presented at the First Annual AP A Zoning Institute, New York, NY, September 1981
- Revision of Oklahoma City Land Development Codes
- Oklahoma City Comprehensive Growth Management Plan . Environmental Impact Assessment, Kiawah Island, SC
- "Environmental Impact Assessment: A Discussion of EIA Process, Its Definition, Purpose & Methodologies " .
- Model Land Use Ordinance, State of South Carolina
- Natural Resource Plan, Santee-Wateree Regional Council
- *Land Use and Environmental Planning: An Application in the South Carolina Coastal Zone " , Water Resources Bulletin, American Water Resources Association, August 1975*
- "Environmental Planning via Land Use Controls: An Approach and Case Study " , Presented at Confer- In 74, American Institute of Planners, Denver, CO
- Environmental Impact Assessment, Port Royal Sound, SC (Battelle Laboratories) .
- Land-Use Trade-Off Model (Battelle Laboratories)
- Moss Creek Plantation, Hilton Head, SC, Environmental Consultant
- Governor's Special Study Committee on Land Policy, South Carolina
- Lower Coastal Development Advisory Committee, South Carolina
- Development Plan for Georgetown County, South Carolina



## client references for similar services in the past three years

The following is a list of references for The AECOM Team.

### **Smart Charlotte 2050 Comprehensive Plan**

Project Manager: Frances Chandler-Marino  
Contact: Jeff Ruggieri, Growth Management Director  
18500 Murdock Circle, Suite 344, Port Charlotte, FL 33948  
941.743.1589 | jeff.ruggieri@charlottefl.com | Services provided: 2010

### **City of West Palm Beach Coleman Park Neighborhood Vision Plan**

Project Manager: David Barth  
Contact: Doritt Miller, Deputy City Administrator  
401 Clematis Street, West Palm Beach, FL 33402  
561.822.2222 | dmiller@wpb.org | Services provided: 2009

### **Poarch Band of the Creek Indians Comprehensive Plan**

Project Manager, Public Outreach Coordinator: Frances Chandler-Marino, David Barth  
Contact: Judge Mark Kennedy, 100 Brookwood Road, Atmore, AL 36501  
334.263.9826 | mkennedy@kennedypc.com | Services provided: On Going

### **City of Miami Beach Smart Growth North Visioning Process and Urban Design Plan**

Project Manager: David Barth  
Contact: Keven Klopp, CRA Director, 150 NE 2nd Avenue, Deerfield Beach, FL 33441  
954.480.4222 | kklopp@deerfield-beach.com | Services provided: 2007

### **St. Lucie County Western Lands Study**

Project Manager: Marie York  
Contact: Mark Satterlee, Growth Management Director  
2300 Virginia Ave., Ft. Pierce FL 34982  
772.462.1960 | satterleem@stlucieco.org | Services provided: On Going

### **Miami –Dade County 50 Year Open Space Master Plan**

Project Manager: David Barth  
Contact: Howard Gregg, Deputy Director, Miami-Dade County Parks & Recreation  
Department, 275 NW 2nd St., Suite 544 Miami, FL 33128  
305.755.7877 | hgregg@miamidade.gov | Services provided: 2007



**City of Palm Beach Gardens Visioning Workshops**

Project Manager, David Barth  
 Contact: Ron Ferris, City Manager  
 10500 N. Military Trail, Palm Beach Gardens, FL 33410  
 561.799.4100 | rferris@pbgfl.com | Services provided: 2006

**Boynton Beach Strategic Planning for Parks & Recreation**

Project Managers: David Barth, Marie York  
 Contact: Jody Rivers, Parks Superintendent  
 100 E. Boynton Beach Blvd, Boynton Beach FL 32425  
 561.742.6226 | riversj@ci.boynton-beach.fl.us | Services provided: 2009

**City of Fellsmere Your Town Florida Public Officials Design Institute at Abacoa Visioning and Design Project**

Project Manager: Marie York  
 Contact: Jason Nunemaker, City Manager, City of Fellsmere  
 21 S. Cypress Street, Fellsmere, FL 32948-6714  
 772.571.1616 | citymanager@cityoffellsmere.org | Services provided: 2009

**City of Lauderdale Lakes Cultural Arts Corridor Study**

Project Manager: Marie York  
 Contact: Gary Rogers, CRA Director, City of Lauderdale Lakes  
 4300 NW 36th Street, Lauderdale Lakes, FL 33319  
 954.535.2827 | jgaryr@lauderdalelakes.org | Services provided: 2009

**City of Lauderhill Cultural Arts Corridor Study**

Project Manager: Marie York  
 Contact: Donald Giancoli, CRA Director, City of Lauderhill  
 5581 Oakland Park Boulevard, Lauderhill FL 33313  
 954.714.1534 | dgiancoli@lauderdale-fl.gov | Services provided: 2009

**Broward Center for the Performing Arts Cultural Arts Corridor Study**

Project Manager: Marie York  
 Contact: Jan Goodheart, Vice President of External Affairs  
 Broward Center for the Performing Arts  
 201 SW Fifth Ave., Ft. Lauderdale, FL 33312  
 954.765.5814 | jgoodheart@browardcenter.org | Services provided: 2009

**City of Boca Raton Charter School Conversion Feasibility**

Project Manager: Marie York  
 Contact: Susan Saxton or George Brown, City Clerk/Asst. City Manager, City of Boca Raton, 201 W. Palmetto Park Road, Boca Raton, FL 33432  
 561.393.7836 | ssaxton@ci.boca-raton.fl.us | Services provided: 2010

**Palm Beach County Strategic Planning for Economic Development**

Project Manager: Marie York  
 Contact: Kevin Johns, Economic Growth and Redevelopment Services Director, City of Austin, P.O. Box 1088, Austin, TX 78767 (Mr. Johns relocated to Texas since project completion)  
 512.974.7802 | kevin.johns@ci.austin.tx.us | Services provided: 2009

**Evaluation of the University of Miami's School of Architecture's Knight Program in Community Building Community Charrettes**

Project Manager: Jean Scott  
 Contact: Chuck Bohl, University of Miami School of Architecture, P.O. Box 249178, Coral Gables, FL 333124  
 305.284.4420 | cbohl@miami.edu | Services provided: 2008

**The Florida Planning Toolbox (Jim Murley, College for Design and Social Inquiry, Florida Atlantic University)**

Project Manager: Jean Scott  
 Contact: Jim Murley, Florida Atlantic University  
 111 East Las Olas Blvd., Fort Lauderdale FL 33301  
 305.968.4881 | jmurley@fau.edu | Services provided: 2008

**Community Technical Assistance Panel reports for the Southeast Florida/Caribbean District Council of the Urban Land Institute**

Project Manager: Jean Scott  
 Contact: Carla Coleman, Executive Director, ULI SE Florida/Caribbean Council, 2401 East Atlantic Boulevard, Suite 400, Pompano Beach, FL 33062-5243  
 954.783.9504 | carla.coleman@uli.org | Services provided: 2010

**Jackson County Visioning Project**

Project Manager: Jean Scott  
 Contact: Jim Stansbury, Stansbury by Design  
 4412 14th Avenue East, Bradenton, FL 34208  
 941.748.8663 | srbd@tampabay.rr.com | Services provided: 2001

cost of service

07



## Part I Cost Information

As stated in Tab 3, Preliminary Scope of Services, the cost of services will vary between the Basic, Moderate and Comprehensive Options. Key differences between the three cost options include:

- The number of days allocated for Stakeholder Interviews (Part I)
- The level of detail provided for base maps and the existing conditions analysis (Part II)
- The number of days allocated for Interviews, Focus Groups and Workshops (Part III)
- The type(s) of survey tools selected for the process (Part III)
- Responsibility for the web site (Part III)
- The level of detail included in the Vision Plans and Illustrations (Part IV)
- The format(s) and quality of final documents (Part V)

Our proposed costs for each option, including all expenses and travel, are:

\$150,000 Basic Total Project Cost (not to exceed)

\$200,000 Moderate Total Project Cost (not to exceed)

\$250,000 Comprehensive Total Project Cost (not to exceed)

The chart below shows the differences between the three options:

	Basic Cost	Moderate Cost	Comprehensive Cost
Number of hours allocated for Stakeholder Interviews (Part I)	26 hours	Increase to 52 hours, add \$3500	Increase to 78 hours, add \$7,000
Level of detail provided for base maps and the existing conditions analysis (Part II)		Additional Content Add approximately \$5,000	Additional Content Add approximately \$5,000
Number of hours allocated for Interviews, Focus Groups and Workshops (Part III)	50 hours	Increase to 100 hours, add \$5,000	Increase to 150 hours, add \$10,000
Type(s) of survey tools selected for the process (Part III)	"Survey Monkey", by City	\$10,000 Telephone Survey	\$20,000 Mail/ Telephone Survey, larger sample size
Responsibility for the web site (Part III)	City	AECOM, basic interactive educational website, add \$10,000	AECOM, Multi-page educational website, add \$20,000
Level of detail included in the Vision Plans and Illustrations (Part IV)			
	Products from 3 day charrette	Products from 3 day charrette + refinement, add \$10,000	Products from 5 days charrette + refinement, add \$25,000
Format(s) and quality of final documents (Part V)	3 ring binder, basic graphics	3 ring binder with graphics, color Executive Summary, add \$6,500	Bound color document with graphics, with Executive Summary and Poster, add \$13,000
<b>Additional Fees</b>		<b>\$50,000</b>	<b>\$100,000</b>
<b>Total Fees</b>	<b>\$150,000</b>	<b>\$200,000</b>	<b>\$250,000</b>

Following is a detailed fee schedule for the Basic Total Project Cost.

## PROJECT FEE BUDGET

AECOM

Proj Name: City of Ft Lauderdale Consulting Services for Visioning Project PIC/Principal 5

AECOM#: 10330310.00

Part	Activity	David Barth		Jean Scott		Marie York		AM Sorrell	
		Hrs DLB	Rate \$270	Hrs JS	Rate \$125	Hrs MY	Rate \$125	Hrs AMS	Rate \$125
<b>I</b>	<b>Desire</b>	20		16		16		8	
1	Kick-off Workshop	8		8		8		8	
2	Stakeholder Interviews - 1 day	8		8		8		0	
3	Adjustments	4		0		0		0	
<b>II</b>	<b>Discovery, Existing Conditions Analysis</b>	30		56		32		0	
4	Review Existing Data	4		8		0		0	
5	Base Maps	2		0		0		0	
6	Bus Tour	8		8		8		0	
7	Existing Conditions Analysis	4		16		8		0	
8	Existing Conditions Report	4		16		8		0	
9	Review Meetings and Revisions	8		8		8		0	
<b>III</b>	<b>Discovery, Community Outreach</b>	36		24		24		32	
10	Community Celebration Kick-off Event	8		8		8		16	
11	Interviews, Focus Groups and Workshops - 2 days	8		8		8		16	
12	Survey - by City	4		0		0		0	
13	Website - by City	4		0		0		0	
14	Community Outreach Summary Report	4		8		0		0	
15	Review Meetings and Revisions	8		0		0		0	
		0		0		8		0	
<b>IV</b>	<b>Design</b>	48		32		8		0	
16	Vision Statement	8		0		8		0	
17	Vision Plans - charrette	24		16		0		0	
18	Vision Action Plans (Core Drivers)	16		16		0		0	
<b>V</b>	<b>Discussion</b>	8		8		0		0	
19	Review Meetings and Revisions	8		8		0		0	
<b>VI</b>	<b>Documentation</b>	16		40		32		0	
20	Final Report	8		24		24		0	
21	Executive Summary/Poster	4		8		0		0	
22	Revisions	4		8		8		0	
<b>Subtotal: Labor</b>		<b>158</b>		<b>176</b>		<b>112</b>		<b>40</b>	

### TOTAL FEE

Frances C Planner		Jay Exum Ecologist		Brent Lacy Planner		Mike Sobczak Urban Designer		Blake Drury Urban Designer		Jonathan M Wayfinding		Ryan Cambridge Landscape Designer		Admin Assistant	
Hrs	Rate	Hrs	Rate	Hrs	Rate	Hrs	Rate	Hrs	Rate	Hrs	Rate	Hrs	Rate	Hrs	Rate
FCM	\$205	JE	\$270	BL	\$245	MS	\$175	BD	\$175	JM	\$140	RC	\$80	JM	\$60
0		0		0		0		0		0		0		6	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		72		12	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		24		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		24		2	
0		0		0		0		0		0		16		2	
0		0		0		0		0		0		8		2	
0		0		0		0		0		0		40		14	
0		0		0		0		0		0		8		2	
0		0		0		0		0		0		8		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		16		2	
0		0		0		0		0		0		8		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		0		2	
24		24		24		24		24		24		40		6	
0		0		0		0		0		0		0		2	
24		24		24		24		24		24		24		2	
0		0		0		0		0		0		16		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		0		2	
0		0		0		0		0		0		64		0	
0		0		0		0		0		0		24		0	
0		0		0		0		0		0		24		0	
0		0		0		0		0		0		16		0	
24		24		24		24		24		24		216		40	

*Project cost including all expenses and travel* **\$150,000**

required forms

08



## PROPOSAL PAGES - PART I COST INFORMATION

*Additional information included on Tab 7*

Total project cost including all expenses and travel. Responders are required to submit a tiered cost proposal that includes options for a basic, a moderate and a comprehensive approach for each of the four project deliverables. Each approach should demonstrate a progressively, more detailed level of service and vary according to amount of work and cost, i.e., a basic option for the existing conditions report (deliverable #1) should be less labor intensive and cost less than a comprehensive approach. The tiered cost proposal will allow the City to select deliverable options that suit their needs as well as available funding sources.

The proposal must contain a total cost for all fees for the visioning project. The proposal must also contain a detailed fee schedule that includes estimated hours and hourly rates, inclusive of costs. It must also contain a proposed timetable showing the estimated number of hours and subtotal of fees for each project deliverable.

\$ 150,000 Basic Total Project Cost (not to exceed)

\$ 200,000 Moderate Total Project Cost (not to exceed)

\$ 250,000 Comprehensive Total Project Cost (not to exceed)

## **PROPOSAL PAGES PART II TECHNICAL PROPOSAL**

The following issues should be fully responded to in your proposal in concise narrative form. Each issue should be referenced and be presented in the following order:

Tab 1: Proposal Signature Page

Tab 2: Statement of Qualifications

This section should contain a statement of understanding of the critical issues and opportunities associated with the project and how the Proposer is uniquely qualified to assist the City in this effort.

Tab 3: Preliminary Scope of Services

Provide an outline detailing your approach and concept to the project, and provide a proposed Scope of Services to demonstrate an understanding of the project. Describe how the consultant team will complete the scope of work including a detailed 6-month schedule. The schedule should include periodic (not less than monthly) reports of progress to the Committee. The visioning process must include a variety of interactive public involvement activities. Those submitting proposals are encouraged to suggest revisions to the Scope of Work described in this RFP accompanied by brief explanations of how they would improve the project.

Tab 4: State number of years experience the proposer has had in providing similar services. If services provided differs from the one presented in your proposal, please delineate such differences.

Tab 5: List those persons who will have a management position working with the City, if you are awarded the contract. List name, title or position, and project duties. A resume or summary of experience and qualifications must accompany your proposal.

Tab 6: List clients for whom you have provided similar services in the last three years. Provide agency name, address, telephone number, contact person, email address and date service was provided. If services provided differs from the one presented in your proposal, please delineate such differences.

Tab 7: Cost of Services - Total project cost including all expenses and travel. Responders are required to submit a tiered cost proposal that includes options for a basic, a moderate and a comprehensive approach for each of the four project deliverables. Each approach should demonstrate a progressively, more detailed level of service and vary according to amount of work and cost, i.e., a basic option for the existing conditions report (deliverable #1) should be less labor intensive and cost less than a comprehensive approach. The tiered cost proposal will allow the City to select deliverable options that suit their needs as well as available funding sources.

The proposer understands that the information contained in these Proposal Pages is to be relied upon by the City in awarding the proposed Agreement, and such information is warranted by the proposer to be true. The proposer agrees to furnish such additional information, prior to acceptance of any proposal, relating to the qualifications of the proposer, as may be required by the City.

COMPLETE AND RETURN THE REQUIRED NUMBER OF **PROPOSAL PAGES AND ATTACHMENTS.**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
03/30/2010

<b>PRODUCER</b> Marsh Risk & Insurance Services CA License #0437153 777 South Figueroa Street Los Angeles, CA 90017 Attn: Lori Bryson 213-346-5464 06510B-PROF-CAS*2-10_11 SFO	<b>THIS CERTIFICATION IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.</b>	
	<b>INSURERS AFFORDING COVERAGE</b>	<b>NAIC #</b>
<b>INSURED</b> AECOM Technical Services, Inc. ED&AW, Inc. 515 South Flower Street, 9th Floor Los Angeles, CA 90071	INSURER A: Zurich American Insurance Company	16535
	INSURER B: National Union Fire Ins Co Pittsburgh PA	19445
	INSURER C: N/A	N/A
	INSURER D: Illinois Union Insurance Co	27960
	INSURER E: N/A	N/A

**COVERAGES**

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. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR	INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YYYY)	POLICY EXPIRATION DATE (MM/DD/YYYY)	LIMITS								
A		<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GENERAL AGGREGATE LIMIT APPLIES PER <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	GLO 5965891 02	04/01/2010	04/01/2011	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000								
A		<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS	BAP 5965893 02	04/01/2010	04/01/2011	COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$								
		<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$								
B		<b>EXCESS / UMBRELLA LIABILITY</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input type="checkbox"/> RETENTION \$	27471740	04/01/2010	04/01/2011	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 \$ \$ \$								
		<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE Y/N OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under SPECIAL PROVISIONS below				<table border="1"> <tr> <td>WC STATUTORY LIMITS</td> <td>OTHER</td> </tr> <tr> <td>E.L. EACH ACCIDENT</td> <td>\$</td> </tr> <tr> <td>E.L. DISEASE - EA EMPLOYEE</td> <td>\$</td> </tr> <tr> <td>E.L. DISEASE - POLICY LIMIT</td> <td>\$</td> </tr> </table>	WC STATUTORY LIMITS	OTHER	E.L. EACH ACCIDENT	\$	E.L. DISEASE - EA EMPLOYEE	\$	E.L. DISEASE - POLICY LIMIT	\$
WC STATUTORY LIMITS	OTHER													
E.L. EACH ACCIDENT	\$													
E.L. DISEASE - EA EMPLOYEE	\$													
E.L. DISEASE - POLICY LIMIT	\$													
D		<b>OTHER</b> ARCHITECTS & ENG. PROFESSIONAL LIABILITY	EON G21654693 "CLAIMS MADE"	04/01/2010	10/08/2011	\$1,000,000 PER CLAIM/AGGREGATE DEFENSE INCLUDED								

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS  
 SAMPLE CERTIFICATE \*\*\*EVIDENCE OF INSURANCE\*\*\*\*

**CERTIFICATE HOLDER**

LOS-000924182-13

**CANCELLATION**

AECOM Technical Services, Inc. 515 South Flower Street, 4th Floor Los Angeles, CA 90071-2201	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL <b>30</b> DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES. AUTHORIZED REPRESENTATIVE of Marsh Risk & Insurance Services David Denihan <i>DA Denihan</i>
--	---



# CERTIFICATE OF LIABILITY INSURANCE

4/1/2011

DATE (MM/DD/YYYY)  
4/1/2010

**PRODUCER** Lockton Insurance Brokers, LLC  
725 S. Figueroa Street, 35th Fl.  
CA License #0F15767  
Los Angeles CA 90017  
(213) 689-0065

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.**

**INSURED** AECOM Technology Corporation  
1075642 AECOM Technical Services, Inc  
515 South Flower Street  
Los Angeles CA 90071

INSURERS AFFORDING COVERAGE	NAIC #
INSURER A : Travelers Property Casualty Co of America	25674
INSURER B :	
INSURER C :	
INSURER D :	
INSURER E :	

**COVERAGES** AECTE01 OE  
THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER AND THE CERTIFICATE HOLDER.

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. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	ADD'L INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS	
		<b>GENERAL LIABILITY</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR _____ _____ GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	NOT APPLICABLE			EACH OCCURRENCE	\$ XXXXXXXX
		<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS _____	NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident)	\$ XXXXXXXX
		<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANY AUTO	NOT APPLICABLE			AUTO ONLY - EA ACCIDENT	\$ XXXXXXXX
		<b>EXCESS/UMBRELLA LIABILITY</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input type="checkbox"/> UMBRELLA FORM RETENTION \$ _____	NOT APPLICABLE			OTHER THAN EA ACC AGG	\$ XXXXXXXX
A		<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under SPECIAL PROVISIONS below	TRJUB-4245B23-1-10	4/1/2010	4/1/2011	<input checked="" type="checkbox"/> WC STATUTORY LIMITS	<input type="checkbox"/> OTHER
A	(AZ,MA,OR,WI)		4/1/2010	4/1/2011	E.I. EACH ACCIDENT	\$ 1,000,000	
A	TC2JUB 4245B22 A 10		4/1/2010	4/1/2011	E.I. DISEASE - EA EMPLOYEE	\$ 1,000,000	
A	(All Other States)		4/1/2010	4/1/2011	E.I. DISEASE - POLICY LIMIT	\$ 1,000,000	
		<b>OTHER</b>					

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS**  
RE: EVIDENCE OF INSURANCE

**CERTIFICATE HOLDER**  
10713239  
AECOM Technical Services, Inc.  
515 South Flower Street, 4th Floor  
Los Angeles CA 90071-2201

**CANCELLATION**  
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

**NON-COLLUSION STATEMENT:**

By signing this offer, the vendor/contractor certifies that this offer is made independently and free from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

**Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.**

<u>NAME</u>	<u>RELATIONSHIPS</u>
n/a	n/a
_____	_____
_____	_____
	_____
David L Barth	_____

**In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.**

## **City of Ft Lauderdale Professional Consulting Services for Visioning Project**

### **Addendum No. 1**

Added on Sep 22, 2010:

Addendum No. 1 - An option to attending the pre-bid conference on Thursday, 9/23/10 is a Conference Bridge phone call. Pre bid meeting attended by David Barth

Date: 9/23/10

Start Time: 10:00 am

Duration: 3 hours

Conference Bridge Telephone

Number: 954-828-7451

Meeting ID: 1114

Added on Sep 23, 2010:

Post Pre-Proposal Meeting sign-in sheet.

Added on Sep 28, 2010:

The following documents are being added for background purposes:

A) 1984 Mission Statement

"Best City of its Size by 1994" and list of General Obligation Bond projects

B) Outcomes of 1984 Mission Statement

Projects and initiatives accomplished by the City as a result of the 1984 Mission/Visioning process

C) 1995 Vision Statement and American Assembly Process

The Vision Statement adopted by the City in 1995 and the New Century - New City Assembly Policy Statement

Q & A review | deadline September 28, 2010

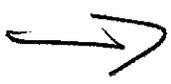
**RFP PRE-PROPOSAL MEETING  
ATTENDANCE SIGN-IN FORM**

DATE: 9/23/10 TIME: 10:00 am

RFP #: 705-10541 OPENING DATE: 10/20/10

RFP TITLE: Consulting Services for Visioning Project

PROCUREMENT CONTACT: Richard Ewell



NAME	COMPANY	PHONE	EMAIL
Richard Ewell	City	X8138	rewell@fortlauderdale.gov
GIANNI LONGO	ACP VISIONING+PLANNING	202 965 0690	GLONGO@ACP-PLANNING.COM
William J. Carnes	MGT of AMERICA	317-407-2935	WCARNES@MGTAMER.COM
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# VISION STATEMENT

## CITY OF FORT LAUDERDALE

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*In 1995, Fort Lauderdale citizens met as an American Assembly to take part in the process to develop the strategic guide for the City into the 21st century. The Assembly's objectives, to continue the forward momentum gained by the City's 1994 mission and to address current and future challenges, resulted in this vision:*

Fort Lauderdale, the "Venice of America," is a tropical paradise. Its beauty makes it truly distinctive, and the City offers residents and visitors a lasting warm and congenial lifestyle. Fort Lauderdale has become a model for other communities, which emulate not only its citizen involvement, but also its commitment to communication and participation in community planning.

Working relationships with other municipalities and agencies are strong, as we share information and resources for our mutual benefit, coordinate key services, and resolve current and future social service issues. Fort Lauderdale is a model of intergovernmental cooperation.

As the region's natural leader, Fort Lauderdale's prosperous commerce center is considered the hub of South Florida. The City is the governmental, financial and cultural center of the region. Its environment attracts and retains desired business and industry through well-trained, educated workers, available facilities, and other enhancements that encourage desirable development. Our downtown, with corporate headquarters, cultural aspects and amenities along the New River, uptown's dynamic business center, executive airport, an industrial commerce center, as well as our world renowned beach, provide a desirable setting for families to live, work and play.

Partnerships make it possible for Fort Lauderdale to achieve its successes. The high level of cooperation among residents, businesses, schools, religious organizations and the City allow the planning and implementation of programs that enhance the quality of life. Innovative projects have provided solutions to social and safety issues, such as homelessness and community policing. Quality of life, growth management and resource identification and allocation strategies have also been developed. Neighborhood organizations provide a voice for every household throughout the City. The network of neighborhood associations is a family that shares resources, collaborates with other organizations, and provides leadership to empower our entire City. Revitalization of the northwest and other areas of the City has transformed neighborhoods at risk into vibrant centers of economic and cultural richness.

Fort Lauderdale has attracted a diverse population and maintained a hometown feeling even as it provides improved access into and through the City. Neighborhoods are preserved and connected through improved streets and a network of pedestrian and bike paths. Our streetscape and natural habitat are sustained through our urban tree canopy, a source of great pride to the City. Public parks and recreation open space needs are met as we continue our focus on environmental awareness and responsibility. With unsurpassed natural beauty, our waterways provide commerce, employment and recreational activities. Water quality standards are among the highest in the country.

The unique needs of Fort Lauderdale's neighborhoods are met by a highly competitive urban school system, with facilities and resources which reflect the community's total commitment to excellence in education. Standards of excellence ensure students are prepared for life outside the classroom; parents and administrators are accountable for success. The City and the community, through commitments and bonds with educational institutions at all levels, have ensured a quality education is available to everyone.

The City is using rapidly changing technology to provide instant access to information and increased citizen awareness on many levels. We are recognized as one of the safest and cleanest cities in the United States, with residents and businesses creating a clean, safe environment in partnership with the City. Fort Lauderdale is truly a model City for the 21st century.



**Policy Statement**

**FORT LAUDERDALE  
NEW CENTURY - NEW CITY  
ASSEMBLY**

**May 4 - 6, 1995**

**Coordinated by the  
Florida Institute of Government  
at Florida Atlantic University  
and the  
Florida Atlantic University/Florida International University  
Joint Center for Environmental and Urban Problems**

# FORT LAUDERDALE - NEW CENTURY - NEW CITY ASSEMBLY

## POLICY STATEMENT

At the close of their discussion in the Fort Lauderdale - New Century - New City Assembly at the Sheraton Design Center, May 4-6, 1995, the participants reviewed as a group the following statement. The statement represents general agreement; however, no one was asked to sign it. Furthermore, it should not be assumed that every participant subscribes to every recommendation included in the statement.

## INTRODUCTION

As with many of the state's older coastal communities, Fort Lauderdale began to lose its appeal during the 1980s as newer, usually western, communities developed and were able to offer more modern amenities and facilities. In 1984 the City adopted the mission statement "To Be the Best City of Our Size by 1994" and began a ten-year campaign to capitalize on its strengths, revitalize a deteriorated downtown and beach, and restore a sense of pride in neighborhood and community. The City is now enjoying the fruits of over \$45 million in bricks and mortar improvements which include the Riverwalk Linear Park, Broward Center for the Performing Arts, Museum of Discovery and Science, the Historic District, the realignment of SR A1A at the beach, and the Oceanfront promenade as well as numerous park improvements, enhanced landscaping throughout the City, and neighborhood improvements.

To continue the forward momentum gained by the past decade and to address unresolved issues, a Steering Committee was assembled in November 1994 to plan the Fort Lauderdale - New Century - New City Assembly. The Committee developed an agenda centered around seven major policy areas which shaped the topics of discussion at the Assembly: Education; Public Safety; Economic Development; Waterways and Beaches; Intergovernmental Relations; Quality of Life/Neighborhoods; and Infrastructure.

On May 4-6, 1995, to consider these issues and to try to forge a shared vision of Fort Lauderdale's future, approximately 115 citizens, representing the public and private sectors, civic groups, and the community at large met to participate in the Fort Lauderdale - New Century - New City Assembly. The conclusions and recommendations reached by the forum are set out below.

## I. EDUCATION

### I. EDUCATION

A. The City and its residents should demand a higher standard from all public schools located in Fort Lauderdale. School policy should be developed from the bottom up, not from the top down. Structural reform should take place in public school administration with "consumers" (i.e., parents, student, community) sharing control with the administrators. Blueprint 2000's resources should be combined with a community implementation strategy. There are several ways in which the City of Fort Lauderdale, the School Board, public, private, and civic organizations, and parents could work together to improve the quality of education in the City.

1. Coordination and cooperation among these various groups is key to improving education in the City.
  - a. All groups (e.g., parents, teachers, principals, and the School Board) must be held accountable for the quality of education. Standards to improve accountability and an evaluation process should be developed. The evaluation process should be overseen by a body independent of the School Board.
  - b. The City should coordinate with the School Board, neighborhoods, and PTAs to work on problems together. The City should foster support from civic associations, parents, and businesses for the improvement of education in Fort Lauderdale. These groups could serve as volunteers in schools. A Council of PTAs should be formed to increase communication among PTA members and strengthen their voice on school issues.
  - c. The City of Fort Lauderdale and the School Board should appoint staff liaisons and establish a mutually agreed upon process which addresses community issues and concerns.
  - d. Civic associations and businesses should both use a version of the "adopt-a-school" model to improve education.
    - 1) Civic associations could "adopt-a-school" to improve parent involvement. Civic associations could also create internal "Education Committees" to reach out to parents and students in their own neighborhoods.
    - 2) Employers could design an "adopt a school" program to allow employees to spend one morning a month in a local school. Employers could offer incentives for employee parent involvement in their child's schools.
  - e. A task force that includes both public and private schools should be created to focus on the common problems and needs shared by area schools. The task force would relay these issues to the School Board.
  - f. Establish community based organizations that include representatives of civic and neighborhood associations, businesses, parents, PTAs, faculty, administrators, and students to support the overall school effort.
2. Proactive support for high quality education must be established throughout the community.
  - a. The community should seek new innovations to improve education. Successful programs in other cities (e.g., Charlotte, N.C.) should be studied as models.
  - b. Students need to receive more basic life skills.
  - c. The City should advocate and market the schools in the City and publicize their successes.
  - d. The City should lobby the School Board to attract quality teachers to Fort Lauderdale schools.

## I. EDUCATION

- e. The community should advocate more technical preparation for students that are not college-bound.
- 3. The City of Fort Lauderdale should make sure that levels of education and funding are equitable throughout the School District.
  - a. Public schools in the City do not receive adequate funding for education and should find a means of receiving more equitable funding. If possible, the City should be given local control of its education funds. Educational quality must be measured and quantified in the City so that the City may receive an equitable return on money its residents spend on education.
    - b. Eliminate discrimination of funding to ensure that the quality of facilities, resources, and instruction is equal throughout the district.
    - c. Re-direct funds from busing to improving other education needs.
- 4. The Broward County School District is too large and bureaucratic to deal with education concerns on a community level. The Assembly participants find the ratio of administration and support staff to classroom teachers too high. Input from citizens is diluted because of the large area the School Board must cover. The City should explore innovative ways to make the School Board more responsive to local needs.
  - a. The City should support legislation to break the Broward County School District into smaller districts. The City should explore the possibility of creating a City school district to better control the quality and reputation of its own schools. If a smaller school district is created, it becomes even more important to support schools-at-risk in the area. These schools must be brought up to the standards of other schools in the area.
  - b. The City should initiate a return to neighborhood schools as delineated in section C. 4.-5. (pages 7- 8) of this policy statement.

B. There are several steps that should be taken in order to adequately serve the educational needs of the residents of Fort Lauderdale. These steps include:

- 1. Infrastructure and facilities for each individual school need to be comprehensively updated.
  - a. There needs to be equality between infrastructure improvements; no "band-aid" approaches should be taken.
  - b. The School Board should spend more money on items intended to help in the classroom (i.e., electrical infrastructure compatible with current technology) than on items such as architectural enhancements.
  - c. Existing infrastructure should be utilized more efficiently, as in allowing after school uses; such uses can make school grounds more safe.
  - d. The community should be involved in determining infrastructure needs; the School Board should solicit this kind of communication and involvement.
- 2. The community should be educated concerning the School Board and its spending. The community should be furnished with comparative data on such things as student/faculty spending ratios and other fiscal data comparative with other school districts so as to foster support for change. There needs to be a vehicle for the dissemination of information regarding what goes on inside schools within City boundaries.

## I. EDUCATION

3. The present expulsion approach for behavioral problems does not work. There needs to be more support of programs that take suspended students off the streets and puts them into alternative programs and/or alternative schools.
  4. Schools should also teach basic life skills. Suggestions include:
    - a. Home economics
    - b. How to balance a checkbook
    - c. "School-to-work" transition training
    - d. "Tech prep" for vocational school (similar to "College prep")
    - e. How to fill out a job application/how to interview
    - f. Teaching students how to learn and adjust to change
    - g. Community service
    - h. Driver's education
    - i. Conflict resolution.
  5. There should be employment and placement services within high schools to help students find after school employment (school system/business partnership).
  6. Parents must be held accountable for their children's school attendance.
  7. The School Board, administrators, and teachers as well as individual schools should be held accountable.
    - a. There needs to be a system whereby teachers and administrators can be held to a certain standard. Teachers need to be re-empowered.
    - b. Schools should be subject to performance-based budgeting and accounting; schools should be audited as a whole, not merely specific programs. The evaluations should be made public.
  8. The City of Fort Lauderdale should develop merit awards to give praise and recognition to outstanding students, teachers, principals, and schools.
  9. School board members should be elected by district, instead of at-large, to improve accountability.
- C. The City of Fort Lauderdale should strive to have schools rated in the top ten nationwide in terms of quality within the next ten years. Community-based, neighborhood schools are considered to be the primary means of achieving this goal. The concept of having elementary, middle, and high schools in the same neighborhood, and possibly at the same facility, should be explored. Quality in education and neighborhood schools should be promoted by the following:
1. Funding levels for all schools must be equitable.
  2. Blighted neighborhoods need to be revitalized and the schools in those neighborhoods upgraded. These measures would enhance the perception of the neighborhood with regards to liveability and the school as a desirable place to send one's children.
  3. Busing and starbursting are not seen as desirable methods for integrating schools because of neighborhood fragmentation. If neighborhoods were integrated, schools would be also.
  4. Elementary, middle, and high school students should be able to attend schools that are closest to them geographically.
  5. Successfully integrated schools should be studied to understand how they achieved integration.

## I. EDUCATION

Existing schools that are currently diverse should be promoted.

6. Demographics in the City should be reexamined to redistrict school zones in a racially balanced manner. Racial balances should be maintained using local children. A working solution to school integration should be presented to the School Board.
7. The community at large needs to be educated to see the greater good in developing a sense of neighborhood through neighborhood-based schools.

## II. PUBLIC SAFETY

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### II. PUBLIC SAFETY

- A. The quality of life Fort Lauderdale residents enjoy is negatively impacted by crime occurring in the City. Occurrences of crime, however, are one portion of a larger criminal justice issue. Concerns regarding criminal justice, particularly the juvenile justice system, follow below.
1. The City should lobby the State Legislature to fund juvenile services, facilities, and operating expenses.
  2. A stronger focus (and more funding) should be placed on prevention methods. These methods may include:
    - a. Businesses need to be more committed to providing better employment opportunities for area youth.
    - b. More alternatives should be provided to encourage youth involvement in productive activities.
    - c. A strong parent/school/neighborhood partnership would help control problem youth.
    - d. Look at and treat the problem in a holistic manner; recognize the influence of the youth's environment.
    - e. Promote the slogan, "It takes a community to raise one child."
  3. Juvenile detention centers should be integrated with educational services.
  4. The consequences of crime should serve as more of a deterrent.
  5. The courts should order juveniles to make restitution more often and there should be appropriate follow-through to ensure that restitution (either monetary or community service) is completed.
  6. Parents should be held accountable for their children's crimes and should have to make restitution.
  7. Community service programs need more funding. Offenders should be used to benefit the community. Community service programs and "banks" should be expanded and made more accessible by the City of Fort Lauderdale to match offenders with community needs. First offenders should be targeted for counseling and guidance.
  8. Programs such as "Business Against Narcotics and Drugs" should be supported and promoted.
  9. Victim's rights and the protection of society should be placed above the rights of a perpetrator, regardless of age.
  10. The State's sentencing guidelines should be amended to provide more severe and easily applied penalties/sentences and reduce early release.
- B. The problems of crime cannot be solved solely by law enforcement and other governmental agencies. Neighborhoods, families, businesses, and religious organizations must all be involved in crime prevention in the community.
1. Crime prevention issues should be prioritized, and the most serious crime problems should be addressed first. Funding of crime prevention programs should be increased.
  2. After-school programs and other youth-oriented activities should be expanded.
  3. Youths should be exposed to positive role models through mentorship programs sponsored by the City, youngsters and police (such as "open rides" allowing youths to ride with officers on their beats).

## II. PUBLIC SAFETY

4. Parents should be educated and empowered with the skills necessary for dealing with their children on the issues of crime and crime prevention.
5. The community should set up programs to assist with the responsibility of raising neighborhood children. The community should become an extended family.
6. At-risk persons and juveniles should be identified and helped through churches and other organizations.
7. The City should provide timely and accurate local crime statistics to neighborhood associations to better educate residents about crime prevention. This information should be disseminated to the public and to neighborhood associations and should coincide with neighborhood association boundaries in order to foster public involvement. Easy-to-understand maps and graphics should be used to show neighborhoods what is occurring in their own areas.
8. Neighborhood associations should increase their cooperation and communication with police, citizens, and other neighborhood associations to address the crime problem. Neighborhood associations should work together to overcome neighborhood boundaries.
9. A citizen outreach program should be initiated to go into communities to encourage citizen participation and volunteers to assist police.
10. Landlords should be educated and involved in crime prevention, in order to ensure that buildings are kept up and environments that foster crime are eliminated. Uniform, prioritized code enforcement and police support are important in maintaining community pride and a crime-free environment. The landlord responsibility section of the Municipal Code and the Florida Statutes should be enforced.
11. A citywide commitment must be made to revitalize Northwest Fort Lauderdale.
12. The City needs to look at how to more effectively control guns in the community.

C. A comprehensive change must take place in the way policing is undertaken in the City. Community policing must be increased throughout the City. Some methods that should be implemented to improve community policing in the City are:

1. Increase resources aimed at community policing.
2. Increase the number of units on patrol to improve deterrence.
3. Designate a police officer for each community. This will help to forge a bond between the community and its police officer. Police officers and neighborhood associations should be encouraged to work together on community problems. Police officers should attend more neighborhood association meetings.
4. Increase interaction between residents and police officers by having neighborhood beat cops patrol on foot.
5. Increase the number of police/service aides in the community.
6. Expand Neighborhood Watch programs and restructure the cellular community policing programs.
7. Increase police follow-up with criminals and with victims.
8. Increase funding of drop-out prevention, anti-drug, and family-oriented programs.
9. Provide kids with a number of youth-oriented activities.
10. Evaluate community policing techniques and examine which are working and how they may be improved upon. Change the training and mindset of police officers and administration to understand

## II. PUBLIC SAFETY

the value and importance of community policing to the community and the justice system.

11. Accelerate the neighborhood clean-up process by requiring landowners to take care of code enforcement violations. Juveniles and others owing community service hours can help with clean-up.
12. Enforce the lien process against property owners with code violations. Do not wait 30 months to enforce it.

D. City residents enjoy a quality of life reflective of the quality of public services within the City. Methods for enhancing service delivery in Fort Lauderdale are outlined below:

1. It has been suggested that the City of Fort Lauderdale establish a "Neighborhood Services Department as a vehicle through which:
  - a. Neighborhood concerns may be voiced.
  - b. The efforts of community/religious/business organizations may be publicized.
  - c. Service delivery personnel may be held accountable for their performance.
  - d. The need for services may be prioritized along neighborhood lines.
2. Crime prevention and law enforcement may be enhanced if City police officers live within City limits. The City should explore a strong incentive program to bring police, fire, and other civil servants into the City to live. Improved officer visibility and presence can have a positive effect on crime prevention. All laws should be enforced. There needs to be improved coordination between City police and the Broward Sheriff's Office regarding police services to provide for efficient services.
3. Labor-management problems need to be addressed by the City. City negotiators should have more training on labor relations and mediation; personal issues should be kept out of labor negotiations.
4. Neighborhood groups should prioritize code violations in their neighborhoods and bring the violations to the City's attention. There should be more code enforcement teams in the City. The Commission needs to take a firm stand with violators to ensure that code violations are corrected.
5. The City should investigate the possibility of privatizing code enforcement through a pilot program.
6. There should be a single tier emergency medical service system within the City. City residents should demand this service either from the City or the County.
7. There should be better coordination between the Emergency Medical Service System and other services within the County.
8. Disaster preparedness plans should be disseminated to neighborhood associations. Unique aspects of each neighborhood should be considered when disaster plans are updated and a means of post-disaster communication should be established. Disaster plans should include a terrorist component. Security at Port Everglades and the Fort Lauderdale-Hollywood International Airport should be evaluated with regards to terrorism.

E. The City of Fort Lauderdale needs to have equitable levels of law enforcement citywide. If disparities do occur, such disparities should be identified. Methods for ensuring effective law enforcement include:

1. Where enforcement seems to be lacking in a neighborhood, public support should be garnered for lobbying efforts to rectify the situation.
2. The City should look at neighborhoods as partners and cater its programs to fit neighborhood characteristics and needs.
3. Law enforcement personnel should have the ability to decide where police officers are most needed.

## II. PUBLIC SAFETY

This should not be a political issue.

4. Problems in the most crime ridden areas must be addressed effectively and decisively. Police should concentrate in target areas for specific periods of time.
5. The possibility of having civilians/community aides fill out certain incident reports (i.e. traffic), thereby freeing police officers' time, should be explored.

### III. ECONOMIC DEVELOPMENT

#### III. ECONOMIC DEVELOPMENT

- A. Economic development is vital to a city and its residents. However, economic development issues must be balanced with quality of life issues. Fort Lauderdale's priority should be to expand its economic base for the benefit of its residents.
1. A broad economic base should be maintained and expanded to ensure the City's ongoing vitality. The City should:
    - a. Foster technical industries in the area. Technical jobs pay better than retail/service sector jobs.
    - b. Promote year-round tourism.
    - c. Continue to invest in its environmental and cultural amenities, such as Riverwalk, beach restoration, and others.
  2. The City should continue to support quality tourism and quality tourist-related development. A good and visible quality of life is important in attracting tourists to the city.
  3. Suitable industries should be identified and targeted for recruitment and retainment.
    - a. Communications/information technologies and other high tech industries, the film industry, and the marine industry should be the primary targets.
    - b. Fort Lauderdale should be marketed separately from Miami.
    - c. A local "Ambassador" program should be created to welcome and take care of tourists and businesses located in Fort Lauderdale. A corps of volunteers under the guidance of a small number of paid professionals should be recruited to fulfill this role. Speakers of Latin American and European languages should be trained to serve in this capacity.
    - d. The City should sponsor bringing "foreign consulates" to Fort Lauderdale.
    - e. The City should emphasize retaining and expanding its marine industry by enhancing waterways and "mega-yacht" opportunities.
    - f. Take advantage of all developing markets including those in Latin American and the Caribbean.
    - g. The City should encourage innovative ways to foster the widespread use of renewable energy resources within the City.
  4. Employment and career opportunities within the City should be enhanced. Business training opportunities can be strengthened by building relationships between businesses and local colleges and universities. The City should be an advocate for local vocational schools and increase their ties to local businesses.
  5. The City should start now to develop alternative transportation systems other than the automobile. Transit systems (such as Tri-Rail, buses, and downtown circulators or "peplemovers") should link the airport, the port, the downtown, and the beaches.
  6. Diversified housing opportunities should be developed and owner occupancy encouraged.
  7. Community Development Plans should focus on how to improve deteriorated neighborhoods, while preserving neighborhoods that are vibrant and healthy. These plans should be tied to local comprehensive plan goals, objectives, and policies. Neighborhoods in decline should be redeveloped

### III. ECONOMIC DEVELOPMENT

in a timely manner; demolition or "urban renewal" programs should not be used.

- a. The City should focus its primary redevelopment efforts in Northwest Fort Lauderdale. This area would benefit from the promotion of homeownership opportunities and mixed development.
  - b. Economic incentive programs should be revamped and should promote mixed-use development in at-risk areas.
  - c. The Neighborhood Improvement Program should be expanded and better funded. Existing housing in downtown neighborhoods could be revitalized by improving sidewalks and landscaping and upgrading old infrastructure systems.
  - d. Small shopping centers should be revitalized and mixed-use zoning should be encouraged where appropriate.
  - e. The City's existing CRA should be expanded to encompass the area from U.S. 1 west to the City limits, between Broward and Sunrise Boulevards.
8. Cultural diversity is one of Fort Lauderdale's strengths, and should be utilized more fully.
- a. Companies should be encouraged to diversify their staff by recruiting locally. This would create an economic boost for the company by making ethnic groups more comfortable in dealing with that company.
  - b. The City should encourage diversity through board appointments. Board members should be appointed by the entire Commission rather than on an individual basis. The City should be encouraged to revise its charter to reflect this.
  - c. The City should promote cultural activities and social events to the entire community. These events should be marketed in different neighborhoods and newspapers.
9. Bridge heights in the area should be investigated. Bridge heights may need to be raised on key waterways to allow for the passage of larger boats. This will bring additional revenue into the City.

Incentives are often offered to businesses seeking to relocate to another jurisdiction. While some incentives are monetary in nature, others are not. Recommendations for both monetary and non-monetary incentives the City of Fort Lauderdale may offer to possible new and existing businesses follow.

1. Monetary incentives
  - a. Consideration needs to be given to provide incentives for targeted industries. Tax abatements should only be offered in measurable cases of economic benefit and long term commitment to the City.
  - b. The City should continue to aggressively pursue an Enterprise Zone designation from the State.
2. Non-monetary incentives
  - a. The City should continue to provide capital infrastructure incentives (e.g. the Broward Center for the Performing Arts) that enhance the area's quality of life.
  - b. A major incentive is the availability of safe and attractive neighborhoods in which to live. The City and community need to work together to ensure these standards for all of Fort Lauderdale's neighborhoods.
  - c. The City should advocate job training and other educational opportunities that support

### III. ECONOMIC DEVELOPMENT

- existing and/or relocating businesses. Workstudy programs should be instituted in area schools where appropriate.
- d. The one-stop permitting process begun by the City should be made as user-friendly as possible including staff training to ensure customer-oriented service.
  - e. Encourage and facilitate the use of ombudsmen to market the City and address the problems of both recruitment and retention of businesses.
  - f. A business user survey could be employed to evaluate and, as necessary, re-engineer City services that pertain to the business community.
  - g. Alternative financing, management, and technical assistance programs that assist minority small businesses (e.g. financing through public/private partnerships to leverage funding) should be developed.
  - h. Recognizing that Fort Lauderdale is not New York or Chicago, the City should adopt a set of voluntary guidelines for "acceptable formal wear" suited to the humid climate of South Florida.
3. The City should promote its successes and accomplishments through the media and by way of neighborhood association newsletters. Residential neighborhoods in "fringe" areas should be protected/buffered from high-density and/or intensity development.

## IV. WATERWAYS AND BEACHES

### IV. WATERWAYS AND BEACHES

A. The City of Fort Lauderdale's coastal areas and waterways are an invaluable resource to City residents, visitors, and businesses alike. In order to manage and protect this resource, the City should take a comprehensive, holistic look at the entire system. Specific management recommendations include:

1. Areas need to be developed and/or designated for the use of personal watercraft and water skiers (e.g., City/County parks, undeveloped lakes, rockpits).
2. Public access to the beach must be protected and improved. An area of beach access should be retained that offers reduced and/or prorated parking for City residents. There should be bicycle racks strategically located throughout the City, in addition to the beach.
3. Water transit opportunities should be encouraged/increased
4. There should be an added focus on landscape amenities, both public and private, to accent beach and waterway features.
5. The City should consider a special assessment district on the beach to fund infrastructure improvements over and above the what the CRA already has in place.
6. The beach redevelopment plan should be reviewed for consistency with current public policy. A design/architectural review needs to be performed to assess design guidelines and criteria for beach development.
7. The City should pursue dredging/deepening the Intracoastal Waterway from the 17th Street Causeway to the Birch/Las Olas docks to provide enhanced large boat access to City waters. In addition, the City should maintain dredging of all other Fort Lauderdale waterways as required. Grant funding for the project should be pursued.
8. The possibility of raising and widening City bridges over navigable waters should be explored to allow larger boats increased access and to help increase property values upstream of the raised bridges as well as to enhance traffic and safety features.
9. The City should provide additional, regulated docking and mooring spaces for boaters, thereby gaining added non-tax revenue.
10. Existing zoning designations within the City should be examined to ensure the viability of the marine industry, including small boatyards. The development of state-of-the-art commercial marinas should be encouraged in the community. City staff should assist with developing policies to make this a possibility.
11. Beach renourishment is a serious problem in Broward County and parts of the City. Fort Lauderdale should strongly support beach renourishment efforts. All funding sources (e.g., county, state, federal) should be aggressively pursued.
12. In partnership with the Marine Industries Association of South Florida (MIASF), the City should conduct a study of its mega-yacht industry to develop means of attracting and retaining this segment of the industry, particularly in light of the increasing competition for its market niche.
13. In order to attract increased mega-yacht business, an annual "World-Wide Mega-Yacht Rendezvous" should be promoted, perhaps in conjunction with the Winterfest Boat Parade.
14. Small boat facilities need to be protected and enhanced.

#### IV. WATERWAYS AND BEACHES

15. The City should enforce ordinances related to dock rentals and live-aboards. High priority should be placed on live-aboards and discharge violations. Ordinances should be strengthened relative to live-aboard and discharge requirements.
  16. Land-side access for saltwater fishing needs to be improved.
  17. The City should promote the sponsorship of international marina events such as the Whitbread Round the World Race.
  18. Promotion needs to be given to greater public access to waterways and canals.
- B. The quality of the City's waterways is of major concern. The City and the community need to take a proactive, coordinated approach in improving water quality. Suggestions towards this end follow.
1. The County's "New River Restoration Plan" should be implemented. The North Fork of the New River should be given high priority. Deadlines, goals, and objectives should be developed in conjunction with the plan.
  2. The City's landscape ordinance should be rewritten to reflect best management practices that will reduce the amount of fertilizer, pesticide, and irrigation water use along City waterways.
  3. More stringent local/federal guidelines should be pursued and enforced regarding discharges from all vessels. Additional pump-out stations should be constructed.
  4. Improve the marketing and promotion of the "Save Our Swales" program to restore swale drainage for stormwater runoff. Stormwater tax dollars should be used to enhance water quality measures.
  5. An educational program, directed towards residents and visitors, needs to be developed and implemented that addresses the consequences of dumping any type of material into the waterways. A public relations campaign regarding pollution issues should be instituted using the media, utility bills, and other creative measures to disseminate information.
  6. All properties along the waterways should be connected to sanitary sewers.
  7. A "Partners in Excellence" program to clean up and remove debris from City waters should be developed that includes participation from the public and private sectors, the community, and the City's youth through community service hours and other avenues.
  8. The possibility of better utilizing the Florida/City marine patrols to ticket polluters should be explored.
  9. The City should evaluate all types of technology which includes the purchase of a de-pollution boat.
- C. The City should work more closely with the appropriate regulatory agencies to eliminate unnecessary regulations and make necessary regulations work more efficiently. One-stop permitting should be introduced where feasible, and the duplication of regulations by different agencies should be eliminated. Agencies must be held accountable for their actions. Other opportunities should be taken advantage of to improve coordination between the City and regulatory agencies and to make the regulatory process more efficient and less burdensome.
1. The City should work together with the South Florida Water Management District (SFWMD) for testing and better regulation of the flow of water through the North Fork of the New River.
  2. The City must be proactive and outspoken in protecting its individual needs, and should not allow the State to dictate local policy which would be detrimental to the City.
  3. The City should consider establishing a liaison to advocate the City's position on environmental

## IV. WATERWAYS AND BEACHES

regulations, and should encourage citizen groups and other advocates to monitor the actions of regulatory agencies.

4. Neighborhood newsletters and bulletin boards should be used to disseminate information on how regulatory agencies are impacting the City and its neighborhoods.
5. The City should form coalitions with groups that stress citizen responsibility over increased regulation.

D. The City and other enforcement agencies must work more closely together to improve safety and other conditions on the water.

1. The City and residents should lobby for a State law requiring operator licenses for boats or a personal watercraft.
2. The City should take a more active role in boater safety and waterway pollution education.
3. The number of marine patrols on the water should be increased.
4. The Fort Lauderdale Marine Patrol should have a greater presence on the City's canals rather than on the Intracoastal. The Patrol should be upgraded with state-of-the-art technology and a variety of watercraft (i.e., personal watercraft for patrol officers).
5. Water law enforcement agencies should meet regularly to coordinate patrols and increase efficiency.
6. Personal watercraft should be limited in areas where quality of life may be negatively impacted but should be balanced with positive water activities that support tourism.
7. Noise and speed regulations and DUI laws must be more strictly enforced on the waterways.
8. The public must have better access to marine patrols, especially to report incidents, such as DUI. Law enforcement agencies should monitor with the use of VHF radios (Channel 16).
9. The City, in cooperation with MIASF, should require compliance with noise and speed regulations, and require the use of mufflers within the City limits.
10. Speed limits in waterways need to be examined. Idle speed, minimum wake, and slow speed regulations need to be better defined.
11. Coast Guard Auxiliary Power Squadron classes should promote education of waterways issues.
12. Neighborhood and civic associations should help educate people on rules and regulations governing the waterways.
13. Marine related commercial intrusion into residential areas should be reduced.

## V. INTERGOVERNMENTAL RELATIONS

### V. INTERGOVERNMENTAL RELATIONS

- A. The City should improve communications and coordination with other governmental entities, especially the County.
1. Relations must improve between the City Commission and County Commission. It is urgent that an ongoing dialogue take place, formal communication linkages be forged between the two Commissions, and regular meetings be held to deal with problems requiring mutual cooperation. These regular meetings should include both Commissioners and administrators from the City and the County. If the City and the County cannot work together efficiently, then alternative systems of government, such as a consolidated city-county government should be explored.
  2. County Commissioners should be consistently invited to participate in City events.
  3. The possibility of standardizing codes, regulations, and schedules on a countywide basis should be explored as a method for improving cost effectiveness and simplifying government.
  4. Although Fort Lauderdale has good relationships with its nine abutting municipalities, meetings and dialogue with adjacent cities could be increased. The City may be able to form alliances with other municipalities having similar interests and concerns to form a unified voice when dealing with these issues. Neighboring cities should improve communications on issues involving shared boundaries.
  5. County Commissioners should be elected through single-member districts. This would increase responsiveness and accountability to constituents and would allow Fort Lauderdale to deal directly with one or two Commissioners instead of all seven.
  6. Communication between the City and the County, the School Board, and State representatives should be less bureaucratic. More direct approaches to communication, such as regular meetings, should be fostered.
  7. The City should improve communication and coordination with the SFWMD and other agencies at the policy-making level. Responsibility for key intergovernmental issues should be assigned to specific elected officials, and staff members should attend meetings on their behalf. City officials may delegate these responsibilities as they deem necessary.
  8. A City liaison position should be created to express the City's interests and gain commitment from the County, South Florida Regional Planning Council (SFRPC), SFWMD, and other appropriate governmental bodies and agencies, and to give oversight to their productivity. A liaison should also be designated to serve as a contact point between the City and the colleges and universities.
  9. The City should coordinate with local colleges and universities to strongly encourage students and faculty to become involved in City issues and projects.
  10. The League of Cities is an important and underutilized tool in intergovernmental coordination. It should be utilized as a strong coordinating entity.
  11. A conflict resolution process should be established between the City and other governmental bodies for the timely resolution of issues. "Issue resolution" should be used prior to a need for "dispute resolution."
  12. Information sharing on actions and decisions should be increased. Relevant information from various governmental meetings should be disseminated to keep date on local issues and actions. Information

## V. INTERGOVERNMENTAL RELATIONS

from State agencies should be disseminated through civic associations to encourage citizen activism, and to City staff to increase intergovernmental coordination and understanding. Civic associations should also receive regular public press releases. Utility bills are another available means to disseminate information to citizens.

13. The City should communicate to service users how the City is subsidizing these uses. For example, the beach parking fee only covers a fraction of the cost of beach maintenance and security. Signs, receipts, and the like should thank users for their contribution to paying the cost of services.
  14. There should be improved coordination between marine agencies as to communication and jurisdiction. They should utilize integrated state of the art technology to increase coordination and communication.
  15. Local cable system's government access channels and new computer network technologies should be utilized to inform citizens of local issues and activities. Integrated computer networks should be implemented to increase intergovernmental coordination.
  16. The City's organizational structure should be evaluated to determine where it can be made more efficient.
- B. Two issues, homeless and EMS service, deserve special attention from both the City and the County. Coordination and communication is necessary to end the lack of progress on these important items of concern.
1. There has been a complete breakdown between the City and the County regarding the homeless problem in Broward County. The homeless issue must be addressed and resolved by the City and the County together. Regular meetings should take place between the City and the County until meaningful action is taken to resolve this ongoing problem.
  2. City staff should meet with County staff to solve the EMS problem immediately.
- C. In the context of declining public dollars for services, efforts should be made to eliminate duplication and inefficiencies in service delivery. The City should, in consultation with the County, examine possible areas of overlap and identify which agency/jurisdiction is best equipped to provide that particular service. The dollar costs of duplicative services should be identified. Services provided by the City should also be examined in light of whether the City is the appropriate provider for the service. Other specific recommendations are set out below.
1. The possible duplication of services between the Fort Lauderdale Police Department and BSO needs to be examined.
  2. City and County staff should be requested to study and identify which services may best be provided on a regional level.
  3. The Council of Fort Lauderdale Civic Associations should be urged to broaden its scope to countywide issues that affect the City and its neighborhoods.
  4. Competitive service delivery should be explored in order to be able to deliver services at the best possible cost without sacrificing quality. However, the residents of the City may demand a higher quality of service that may not be the least expensive.
  5. City and County occupational licenses should be consolidated into one license, with costs and revenues split between the two entities.
  6. City and County advisory boards should be encouraged to work more closely together.

## V. INTERGOVERNMENTAL RELATIONS

7. A minority opinion believed that the Budget Review Committee should remain intact. The Committee should explore the most economical and efficient means of providing City services.
- D. Residents and officials of Broward County must be made aware of the contribution of Fort Lauderdale to their quality of life and the impact on all infrastructure by non-residents using City facilities (i.e., Beach, Riverwalk). The City of Fort Lauderdale should launch a public relations campaign to inform County and City residents as to the inequitable levels of revenue sharing the City receives from both County and State funds. The revenue sharing formulas employed by the State and the County should be revised to reflect more than a simple population ratio. The City should also make City and County residents aware of the City's contribution to the County's tax base. Other proposals include:
1. The Homestead Exemption should be restructured to ensure that everyone pays something.
  2. A portion of County ad valorem dollars needs to be designated as a regional tax that comes back to the City from the County to help support regional services (e.g. the beach) that the City provides.
  3. An inventory of all non-Fort Lauderdale governmental facilities should be taken and values assessed to educate the populace as to the value of property for which Fort Lauderdale provides services yet receives no ad valorem taxes. The possibility of using these values to restructure State and County revenue sharing should be explored.
  4. Citizen lobbying efforts should be used to solicit County or State funds (i.e., Preservation 2000) to acquire environmentally sensitive lands within the City and to improve beach services.

## VI. QUALITY OF LIFE/NEIGHBORHOODS

### VI. QUALITY OF LIFE/NEIGHBORHOODS

- A. Quality of life is a focal point and key to the vision of this Assembly. The City and its residents can actively improve the quality of life in Fort Lauderdale's neighborhoods. A citywide master plan should be developed to express a vision for Fort Lauderdale and its neighborhoods. A number of quality of life issues must be addressed and innovative solutions should be developed and implemented.
1. Safety and crime prevention involve more than police protection. Citizen awareness, neighborhood design, and traffic flow are all directly related to safety and quality of life issues in neighborhoods.
    - a. Crime Watch programs should be revitalized, promoted, and supported.
    - b. The City should work with neighborhoods to enforce "No Loitering" laws in front of stores including techniques such as closing stores in the evening in areas where appropriate.
    - c. Neighborhood police officers should be assigned to specific neighborhoods for at least one year.
    - d. Neighborhood streets are often used as alternatives to the main arterials. This problem could be reduced by:
      - 1) Improving signalization on main arterial roads. These signals should be constantly monitored and adjusted as needed, taking measures to reduce cut-through traffic.
      - 2) Providing more alternative routes where feasible;
      - 3) enforcing speed limits in neighborhoods; and
      - 4) encouraging the use of public transit.
    - e. Sistrunk Boulevard should be targeted for improved traffic signalization.
    - f. The City should address the impacts of traffic on neighborhoods through neighborhood master plans and environmental design techniques.
    - g. Downtown and beach traffic, and traffic in other appropriate areas, should be managed to increase pedestrian safety.
    - h. An effort should be made to increase mass transit use to reduce the amount of automobile traffic in and around the City. The feasibility of creating a "peplemover" system within the City should be investigated.
    - i. Laws should be equitably enforced in all City neighborhoods.
    - j. The City of Fort Lauderdale and appropriate County agencies should aggressively work together to ensure that McNab Road in Pompano Beach becomes a through street. This would reduce the volume of through traffic on NE 62nd Street and its impact on the safety and quality of life in several of Fort Lauderdale's northeast neighborhoods.
  2. The condition and appearance of the City's neighborhoods can be improved without calling for drastic changes.
    - a. Coordinated efforts between neighborhood organizations should be initiated to rediscover neighborhood identities. Neighborhood-to-neighborhood communications should be encouraged to strengthen ties within the City and lessen feelings of isolation between different communities.
    - b. The City should address the use of newspaper vending stands citywide relating to design and

## VI. QUALITY OF LIFE/NEIGHBORHOODS

- to insure public safety.
- c. If the permanent closure of streets is not implemented within nine months of temporary closures, then they should be converted back to their original condition.
    - d. The City should provide additional bicycle lanes.
    - e. Necessary resources should be allocated to upgrade existing parks, maintain them, and make them safe.
    - f. The homeless problem directly impacts the quality of life in neighborhoods and must be addressed.
  3. Code enforcement plays an important role in the quality of life in the City's neighborhoods. Enforcement of serious code violations is often insufficient and must be improved. Neighborhoods should be empowered to take on additional responsibility for themselves.
    - a. An easy, anonymous method of reporting corroborative, substantive code violations should be made available to neighborhood organizations and other concerned citizens.
    - b. Existing sign, tree-planting, tree preservation, and landscaping ordinances need to be strengthened and strictly enforced.
    - c. Code enforcement for businesses and vacant lots throughout the City must be more strictly enforced.
    - d. Code enforcement officials must be sensitive to citizens needs and should work with them to develop solutions rather than simply ticketing violators. Teams should work on a revolving schedule, including weekend inspections. City personnel, other than enforcement officials, should be aware of code violations and report problems.
    - e. The appeals process for code violations should be accelerated and streamlined.
    - f. Neighborhood beautification projects should be continued through the increased use of matching grant programs and other grant programs.
    - g. Rental property owners and landlords must be held responsible for the upkeep of their dwellings and must work with their tenants for property maintenance and upkeep.
    - h. The Community Appearance Board should work more closely with all neighborhoods. The Board should announce the existence of their annual awards programs through neighborhood associations and through the local government access channel, newspapers and public service announcements.
  4. Zoning and land use designations are important considerations in revitalizing neighborhoods and maintaining healthy neighborhoods. Redevelopment should be done in a socially and environmentally responsible manner and should fit in with the character of the area.
    - a. Neighborhood input must be obtained and considered before zoning changes are recommended.
    - b. Land uses should be compatible. The effects of high-density development on surrounding neighborhoods should be examined. Buffers should be maintained between residential areas and other development.
    - c. Mixed-use zoning can be an important redevelopment tool. Appropriate land use designations should be made in Northwest Fort Lauderdale and more block grant funds should be pursued to assist revitalization efforts.
  5. The relationship between the City and civic, neighborhood, and business associations should be strengthened. Improved communication between City staff and the associations should take place.

## VI. QUALITY OF LIFE/NEIGHBORHOODS

- A taskforce should be created to implement better methods of disseminating City information to the public in order to foster increased public input.
6. The City has a need for more public green space. The City should also focus on upkeep and improved landscaping. Street ends should be landscaped. The City should encourage "victory gardens" as one method of cleaning up and maintaining vacant lots.
  7. Environmentally sensitive land along the North Fork of the New River and other lands designated on the county's environmentally sensitive lands list should be preserved.
  8. Neighborhoods should be educated about the importance the business community has on the quality of life in Fort Lauderdale.
- B. When residents take a "pride in place," the results are often visibly positive. Properties are better maintained, common areas are landscaped, clean, and well taken care of, and the problems of crime are reduced. Encouraging homeownership opportunities also fosters a sense of pride. There are numerous opportunities for the City to facilitate, and for community residents to become involved in neighborhood activities that lead to this end.
1. The City should encourage the formation of neighborhood associations in areas where they do not exist, and should encourage associations that exist but are not active to become active. Currently active homeowner associations should be urged to help with coordinating these activities.
  2. The Council of Fort Lauderdale Civic Associations should develop a mentoring program to empower and educate fledgling associations.
  3. Neighborhood associations should reach out to each other to share experiences and successes through newsletters and joint meetings.
  4. Block parties should be fostered as a partnership between the City and the "block" to get residents out into their neighborhoods together.
  5. "Neighborhood USA" should be invited to hold a conference in Fort Lauderdale.
  6. The City can facilitate neighborhood responsibility and volunteerism by installing equitable levels of infrastructure throughout the City. Then residents themselves can take over with landscaping and other projects.
  7. Each neighborhood should receive its fair share of technical support and funding from the City.
  8. Street closures need to be carefully studied for possible effects in advance of closure. Pilot studies may need to be involved.
  9. Businesses and neighborhoods should work together to resolve existing and/or potential conflicts and differences. Each should understand the importance of the other.
  10. The City should foster districtwide "town meetings" to discuss area issues.
  11. The City should designate a contact person to act as a liaison between the City and neighborhood/civic associations and/or establish an office of neighborhood services.
  12. The City should install more artistic signs at City entrances and help individual neighborhoods with identifying signage.
  13. The City needs to make a community commitment to revitalize the City and its neighborhoods similar to the Delray Beach initiative.
- C. There are areas within the City that are of special concern, especially in the northwest. The value of cultural, ethnic, and racial diversity of the area should be understood by the entire community and must be viewed as an asset and a basis for strengthening relationships among all Fort Lauderdale residents. It is important that

## VI. QUALITY OF LIFE/NEIGHBORHOODS

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Fort Lauderdale residents understand that the revitalization of this area would be of benefit to the community at large. As mentioned previously, the City's existing CRA must be expanded to include the northwest. The City needs to make a commitment to provide needed infrastructure. Resources such as increased police and code enforcement patrols and expanded business and educational opportunities should be directed into the section.

1. Diversity in homeownership opportunities need to be encouraged and increased.
  2. Beautification/landscaping projects should be installed along Sistrunk Boulevard from Andrews Avenue to NW 27th Avenue.
  3. Development/redevelopment in the section should not displace existing residences. Revitalization planning and implementation must proactively involve the residents.
  4. The City should support, financially and technically, the Fort Lauderdale Community Development Corporation Board and community-based or non-profit organizations that promote affordable housing and job training efforts.
  5. A Landlord/Tenant Council should be formed to build stronger relations between the two groups.
  6. An aggressive minority small business program should be developed.
  7. The City should evaluate the affects of mixed-use development to determine its appropriateness in other portions of the northwest section.
  8. A strong, concerted, and ongoing effort needs to be taken to reduce crime in the northwest and to lessen its perception as a place where criminals seem welcome.
- D. There are other areas in the City that require similar concern and action steps comparable to the above which should be considered and implemented.

## VII. INFRASTRUCTURE

### VII. INFRASTRUCTURE

A. The condition of a city's infrastructure has a direct influence, not only on its residents quality of life, but also on a city's economic viability and vitality. The City of Fort Lauderdale needs to remain proactive in upgrading and maintaining its public infrastructure. It has been suggested that the City study the Delray Beach model to determine if and how the model can be applied to Fort Lauderdale. Other suggestions concerning infrastructure follow.

1. Priority items include (but do not reflect a prioritization order):
  - a. Install sanitary sewer systems throughout the City, but especially near (within two blocks of) City waterways. The entire City should be on sanitary sewers within ten years. Funding may come from special assessments.
  - b. Integrate the water supply as to gray water reuse and storage of treated water.
  - c. Install needed improvements in the northwest and the NE Middle River area.
  - d. The City should commit to a viable mass transit system (i.e. a peplemover) and begin planning now.
  - e. Underground utility should be phased in.
  - f. The NW 7th - NW 9th Avenue connector should be constructed together with a commercial business center.
  - g. Existing parks should be preserved and upgraded; new parkland should be acquired and developed. Park master plans should be developed to realize best use. Funding should come from a bond referendum. However, in light of the above and because Holiday Park is the City's "Central Park" and has a recently approved master plan, the City should move rapidly forward with a bond referendum to implement the Holiday Park master plan in its entirety. Consideration should be given to including all parks in the referendum.
  - h. The Progresso area, the Federal Highway corridor, and the Sistrunk corridor are in need of revitalization and prompt City attention.
2. City gateways need coordinated entryway treatments that include signage.
3. The tree canopy should be expanded and viewed as "living infrastructure."
4. The City must continue its street, sidewalk, and canal maintenance programs.
5. Bridge heights should be raised as possible.

B. Specific funding sources for a portion of the above infrastructure are:

1. Sanitary sewers: CDBG funds, bond referendum, F.I.N.D. (water quality), stormwater utility fees, DEP grants for beaches and waterways, and boating fees.
2. Underground utility lines: special assessments, FEMA grants, FPL.
3. NW 7th - NW 9th connector: State and Federal dollars through the Federal Highway Trust Fund, increase in the local gas tax, impact fees, and the utilization of an expanded CRA.
4. Parks: State grants (Florida Development and Recreation Grant Fund), "Rails to Trails" dollars, neighborhood sweat equity and donations, user fees, impact fees, Preservation 2000 dollars, and general revenue for upkeep.
5. Gateways: pro-bono architectural services, landscaping, and other in-kind contributions, ISTEA funds, "Art in Public Places," "Adopt an Entranceway" programs, FDOT, and student sweat equity.

## VII. INFRASTRUCTURE

- C. More general recommendations to fund infrastructure improvements included encouraging the State to pass a constitutional amendment revising the Homestead Exemption to allow the exemption to fall upon the second \$25,000 of assessed value. The possibility of imposing user fees in areas such as boat launching fees, park user fees, and additional impact fees should be examined. A capture or the imposition of a hotel/meal tax would provide added revenues. A pilot program could be developed to collect fees from governmental agencies and users that are provided with City services yet pay no taxes. Special assessment districts, in general, should be utilized in funding infrastructure improvements.
- D. Highest priority should be given to obtaining mitigation (funds and other) from the Fort Lauderdale/Hollywood International Airport DRI and substantial deviation program and applying the resulting mitigation to City infrastructure and concerns impacted by the airport.

## FINAL RECOMMENDATIONS

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- E. A Committee should be formed to plan and monitor the implementation of this Assembly's recommendations.
- F. It is recognized that this policy statement constitutes general recommendations, some of which may require additional funding and the expenditure of tax dollars. The Assembly is not unmindful of the limitations upon public funding and acknowledges that all of its recommendations may not be promptly implemented by reason of lack of funds and sources of revenue. In such areas, priority of implementation must be established to accomplish the Assembly's recommendations by the year 2005.

CITY OF FORT LAUDERDALE  
MISSION: BEST CITY OF OUR SIZE BY 1994

THE BEGINNINGS

\* **THE MISSION STATEMENT:** City Commission and staff, with input from the community, embarked upon a 10-year plan to make Fort Lauderdale "The Best City of Its Size by 1994" and be recognized as such.

The mission has been the springboard for significant investment and reinvestment, revitalization and new projects which continue to prepare the City for a dynamic future.

\* **MAKE IT SHINE:** One of the most visible and successful programs developed in conjunction with the Mission. The Program coincided with the City's 75th Birthday celebration in March 1986. Citizens, businesses and civic organizations were asked to give four hours of volunteer service for a variety of projects. Projects covered the broad areas of: beautification, downtown development, neighborhood revitalization, waterways, beach, historic preservation and cultural development.

129 community projects were completed by more than 8,000 volunteers, in conjunction with businesses which provided in-kind services and donated supplies.

\* **GENERAL OBLIGATION BOND PROGRAM:** The G.O.B. program picked up where the volunteers left off, tackling projects which required a significant investment of dollars. A community-based Blue-Ribbon Committee selected six projects viewed as essential to the future of Fort Lauderdale. An item was placed on the November 1986 ballot to approve general obligation bond funding for the following:

1. Parks and Recreation	\$7,295,000
2. Riverwalk	7,451,000
3. Beach Revitalization	13,787,000
4. Neighborhood Revitalization	6,859,000
5. International Swimming Hall of Fame Museum	1,198,000
6. Discovery Center for Science and Technology	8,110,000

The voters approved all six projects.

With the Mission Statement as an underlying theme and the G.O.B. projects as exclamation points, the City wrote a commitment to the community which is ongoing.

Areas of emphasis include:

## 1990 CITY ACHIEVEMENTS

### Beach Redevelopment

Completed beach side-street median and parking isle improvements and landscaping.

Construction of scenic AIA underway, including infrastructure, streetscape and oceanfront promenade. .

Received proposals from six private-sector developers for redevelopment of the beach's central core. Selected Grand Promenade Venture as prime candidate.

### Riverwalk

Completed Riverwalk Phase I and Esplanade, outdoor-classroom park.

Completed Historic District streetscaping.

Hired full-time horticulturalist, landscape maintenance personnel and three new park rangers for the Riverwalk area.

Assisted PACA in construction of parking garage for the Arts and Science District.

Constructed garage for Broward Center for the Performing Arts.

Through the support of Riverwalk Inc.:

- \* Sold \$200,000 worth of individualized bricks to the project.
- \* Purchased \$20,000 American Street Clock.
- \* Published second in a series of posters.
- \* Scheduled opening of Riverwalk Information Center January 15, in the Riverwalk Centre Building, S.W. 2nd St.

### Economic and Community Development

Instituted Bond Waiver Program to attract more minority- and women-owned businesses to bid on construction projects.

Sponsored downtown zoning workshop for citizens and developers. Gained community input on new downtown zoning regulations.

Established the Fort Lauderdale Conservation Corps, a community-based education and work program for at-risk youth. With the assistance of the Durrs Homeowners Association, the county school system and community, recruited 22 youths.

Secured funding of \$500,000 to implement the the Safe Neighborhood Plan; won Community Development Block Grant of nearly \$2 million; obtained rental rehabilitation funding of \$133,000; secured \$52,000 for community emergency shelter; obtained \$25,000 grant for Youth Sports Club in Housing Authority developments.

Celebrated ground breaking and ribbon-cutting of 31 units of rental housing in the Northwest community.

Renovated 114 rental units and 22 single-family homes.

Completed Housing Authority General Obligation Bond renovations .

Doubled the number of youths participating in the City Summer Job Program.

### Parks and Recreation

Received a \$175,000 grant from the State and County to help fund youth-oriented programming at City parks.

Created new supervised programs in neighborhood playgrounds including Bass, Lincoln, Sunland, Warfield and Lauderdale Manors parks.

Waived fees for recreational swimming to make it accessible to more children.

Added teen activities in evening hours five days-per-week at neighborhood parks.

Established a mobile recreational unit to bring activities directly to Northwest-area youth.

Joined hands with county school board to establish a summer school and after-school program serving five sites and more than 3,000 children.

Hired six-time U.S. Olympic diving coach, Dr. Ron O'Brien, as diving director for the International Swimming Hall of Fame Pool.

Holiday Park playground locomotive refurbished.

Contributed more than 30,000 work hours and saved the City nearly \$200,000 through the Community Service Program.

Renewed New York Yankee contract through 1993.

### Public Safety

Combined efforts with Broward Addiction Rehabilitation Center to offer the Alternative Treatment Against Crack Cocaine (ATACC) Program, a treatment program for crack offenders.

Decreased robbery and residential burglary rates by 11% - 14% respectively through increased Police Department effectiveness. Total crime rate has not increased.

Introduced D.A.R.E., a drug education program, in 14 City elementary schools.

Implemented first year of five-year-plan with 37 new police positions, including 15 public safety aides.

Approved and funded firing range project, now under construction.

Eradicated drug activity and prostitution from 55 locations in the city.

Taught 49 public education programs to various citizen groups; taught 3,052 school children and 510 health care professionals about fire safety and prevention.

Implemented drug-free workplace throughout City facilities.

#### Fiscal Responsibility

Achieved an AA bond rating from both Moody's and Standard and Poors'.

Saved approximately \$1 million by using request for proposal process in procuring 800 MHz trunked radio system for use by public safety departments.

#### Customer Service

Created a Customer Service Office in the Utilities Department to respond to inquiries about water, waste water and storm sewage.

Began a 24-hour air traffic control tower operation at Fort Lauderdale Executive Airport.

Installed an airport noise and operations monitoring system at Executive Airport.

Developed customer service training program, "I am the City" for City employees.

#### Recognition

Named All-America City Award finalist.

Selected as National Gold Medal finalist, in recognition of outstanding Parks and Recreation management.

Awarded National Achievement for Excellence in financial reporting.

Earned Distinguished Budget Presentation Award from the Government Finance Officers Association

Building and Zoning Department rated best in the County by Broward Builders' Exchange.

## CITY-WIDE ACCOMPLISHMENTS 1985-1989

### 1985/86

Adopted Master Tree Planting ordinance and prepared a planting plan for downtown.

Implemented a successful Spring Break management plan.

Established an annual volunteer waterway clean-up program.

Developed an eight-year plan to achieve the goals of the City's Mission Statement.

Developed and adopted the following Statement of Values to serve as a guide for all City employees in the course of their daily work:

-We treat each employee and citizen with honesty, consideration and respect.

-We are committed to keeping taxes and service charges reasonable.

-We always look for a better way.

-We know that an active partnership with the community is vital to our success.

-We know that the City is in the business of customer service and the citizens are our shareholders.

Coordinated the Make It Shine Program involving over 8,000 volunteers participating in City beautification projects to celebrate the City's 75th birthday.

Expanded the Community Appearance Award Program to include residential buildings.

Received a T.D.C. grant for \$575,000 from Broward County for Swimming Hall of Fame Pool and received Florida Recreation Development Assistance Program grant for \$63,000 for the development of Benenson Park.

Consolidated the City of Fort Lauderdale's five wastewater treatment plants into one major plant at the Lohmeyer Treatment Plant, January 31, 1986.

### 1986/87

Assisted in the formation of the Beach Break Committee, a group of beach business, City and Chamber of Commerce leaders dedicated to improving the image of Fort Lauderdale beach and creating a year round tourist trade.

Received approval from the State of Florida for Enterprise Zone application and began efforts to market the program which provides tax incentives to developers who complete projects in economically depressed areas.

Instituted the City's TEAM program patterned after the highly successful Florida Power & Light Quality Improvement Program and based on the Quality Circles approach used so effectively by Japanese industry. The purpose of the program is to fully utilize and develop the skills and knowledge of our employees so that every one of them can help us achieve the City's goal of being the BEST City of its size by 1994.

The TEAM process encourages City employees to participate on teams to solve problems that affect the quality and cost of the services we provide. A Team consists of a trained Team Leader, a trained Facilitator, and six to eight Team members. The Team meets one hour each week and utilizes a highly structured 7 step, problem-solving process to arrive at the solution to the problem they have identified. The Team Leader directs the meetings and teaches the process to the Team members. The Facilitator serves as a technical advisor to the Team Leader and assures adherence to the process.

Initially Teams are instructed to select relatively simple problems as learning the process is most important. The first Team to complete the process was the Maintenance Action Team (MAT) in Utilities. The problem this Team selected was "Failure of sump pumps due to clogged suction, causing frequent pump repairs or replacement". The Team designed a ladle and protective screen, the use of which prevents the clogging from occurring. As a result of this Team's suggestion, the City will save at least \$50,000.

Implemented a minority-business enterprise/women-business enterprise purchasing program at the request of the City Commission.

Began development of a management system for the Docks and Waterways Division of Parks & Recreation which will provide better cash control and scheduling of boat slips leases.

Received the Bronze Award for Excellence in Marketing from the Broward Chapter of the American Marketing Association for the Make-It-Shine volunteer program.

Provided Latchkey Programs (Fort Lauderdale After School Hours - F.L.A.S.H.) at six elementary schools throughout the City.

Taught 2,700 school age children to swim in cooperative agreement with public school system.

Received the American Water Works Association (Florida Section) Award of Progress to management and employees for safety incentives in the water works industry.

Finalized a wastewater pretreatment program to eliminate industrial waste to our sewer system which will augment and maintain the balance of normal domestic wastewater and relieve industrial toxic loads on the wastewater plant.

Emphasized environmental inspections in cooperation with active civic associations, to place a high priority on neighborhood cleanliness, sanitation dumpster positioning and maintenance, and the now well-used bulk trash pick-up program.

1987/88

Instituted the TEAM process which encourages City employees to participate on Teams to improve their problem solving and communications capabilities and provide management with ideas which will supply quality services to the public at a lower cost or additional services at the same cost.

Negotiated a 15-year franchise agreement with the telephone company (Southern Bell).

Increased the level of bid awards to Minority and Women-Owned Business.

Re-emphasized the City's commitment to Affirmative Action by coordinating the work of the Affirmative Action Task Force and establishing a position of Affirmative Action Specialist.

Secured a \$206,290 grant from the Florida Department of Historic Preservation for the restoration of Old Dillard School, the first school built for blacks in Broward County in 1924.

Established a full-time Code Enforcement Team consisting of a building inspector, fire inspector and police officer.

Successfully prosecuted landlords in the Northwest section of the City for Minimum Housing Code violations.

Secured a Safe Neighborhoods Act Planning Grant to assist the Northwest Revitalization efforts.

Designated a Finalist in All-America City Award Competition.

Introduced and successfully fought for passage of a bill allowing municipalities to reduce residential speed limits to 25 mph.

Co-sponsored the Urban Land Institute Conference in September to refine the redevelopment plan for the central core area of the beach.

Developed a zoning ordinance for the Central Beach Area designed to facilitate quality redevelopment and rezoned the area into six new zoning districts

Developed a grant from the TDC in the amount of \$144,000 to offset the costs of Spring Break.

Instituted the Development Review Committee which reviews, comments on and establishes City requirements for approval of all substantial building developments within the City.

Applied for and received a \$280,000 grant from the State to prepare a Safe Neighborhoods Act Plan for the Near Northwest area.

Coordinated with an outside architect the preparation of plans and specifications on the Northwest Boys' Club Gymnasium Project, a joint funding effort between City and the Boys' Club of Broward County, Inc.

#### 1988/89

Adopted the City's Comprehensive Plan which will guide development and redevelopment in Fort Lauderdale for the next 25 years.

Took several key steps to bring about the redevelopment of the central beach area:

- Established a Community Redevelopment Agency to guide redevelopment plans.

- Appointed Beach Redevelopment Board.

- Approved a conceptual redevelopment plan for the area.

Made a financial contribution to help Fort Lauderdale's first Community Development Corporation.

Created the City's first Summer Youth Job Program in cooperation with the business community and BETA.

Approved a Recycling Program to reduce the amount of waste going to the landfills and incinerators.

Took advantage of favorable market conditions and refinanced two bond issues, saving the City \$1,780,000 over the life of the bonds.

Directed the development of and adopted a new "bufferyard" zoning ordinance which will require commercial developments to minimize negative impacts on adjacent residential areas.

"Privatized" the maintenance of the City's Radio Communications systems resulting in a direct annual saving of \$203,000 resulting in backlog reduction of portable radios requiring service from an average of 105 to 5 days freeing up \$60,000 in spare inventory for field use.

Initiated the first Office Paper Recycling Program for City employees on October 1, 1988, resulting in nearly 50 tons of paper sold to a recycling company generating revenues of \$4,000 and lowering trash pick-up costs by \$1,500 annually. (As of November 30, 1990, 121 tons of paper generated \$14,400 in revenue and \$3,000 + in reduced trash pickup costs.)

Established and filled the position of Minority Business Opportunity Specialist to identify businesses owned by minorities and women who may wish to compete for City awards and contracts.

Created a Bid Hot Line in Purchasing Division providing a weekly updated recorded message on goods and services desired by the City.

Received an Innovative Program Award from the National League of Cities for the Code Enforcement Team's activities.

Coordinated the Glad Bag-A-Thon Program under which 3,127 volunteers performed work with an estimated value of \$86,385 to complete 50 clean-up/beautification projects, resulting in the gathering of 268 tons of trash.

Instituted use of the "parkulator," an extremely sophisticated tool, that will permit the prepurchasing of time for parking and can be used in conjunction with meters without requiring the driver to carry change.

#### G. O. B. PROJECTS 1985-1989

1985/86

Neighborhood Master Plans:

-Designated Riverside Park as first neighborhood to develop a master plan.

-Prepared a "how to" manual to be finalized and distributed to neighborhood associations.

Contracted with a national planning firm to prepare a Central Beach Revitalization Plan.

Formally adopted the Riverwalk Master Plan

Prepared an economic feasibility analysis of Brickell Avenue proposal.

Commissioned the development of a Riverwalk poster to promote public awareness of the Riverwalk Plan.

Coordinated development of a \$44.7 million General Obligation Bond program designed to make Fort Lauderdale the best City of its size in America.

Commissioned and directed the preparation of the Riverwalk Master Plan.

1986/87

Selected a multi-discipline team to perform planning and design services for the \$13.8 million General Obligation Bond-funded improvements in the Central Beach area.

Began the Neighborhood Master Plan program with the submission of the Riverside Park Master Plan.

Worked with the Fort Lauderdale Housing Authority to implement General Obligation Bond projects to provide roof repairs, rewiring, appliance replacement, and other improvements at seven public housing complexes.

Selected a consultant team to prepare design guidelines and Phase I design of Riverwalk.

Prepared a conceptual plan for the Riverwalk through Historic District.

Selected E. Verner Johnson to design the new Discovery Center for Science and Technology.

Working with School Board and other entities in the Arts and Science District, received a \$760,000 grant from the Florida Department of Education to plan the Arts and Science District which will include the Performing Arts Center, the Discovery Center for Science and Technology, Riverwalk park and a parking garage.

Received \$200,000 from Florida Department of Transportation for design services related to one-way pairing of A-1-A.

Received \$2.5 million allocation from the State for A-1-A roadway improvements.

Published a "Guide to Neighborhood Master Plans" to assist neighborhood civic associations through the master planning process.

Selected the architectural firm of Arquitectonica to design the ISHOF museum renovation and expansion.

Selected the firm of Edward D. Stone, Jr. and Associates to prepare design guidelines and Phase I design of Riverwalk.

1987/88

Beautified medians on Federal Highway, Broward Boulevard, N.W. 19th Street and N.W. 9th Avenue.

Worked in cooperation with School Board of Broward County to secure and allocate a Public Education Capital Outlay grant totalling \$22.2 million over two years toward development of the Arts & Science District on the New River at S.W. 7th Avenue, to include the Discovery Center, Performing Arts Center and Esplanade: Riverwalk Esplanade - \$1.5 million, Broward Center for the Performing Arts - \$7.75 million, Discovery Center - \$10.75 million, Infrastructure - \$1.2 million and construction management shared by partners and school board - \$1 million.

Designed new roadways and sewer systems for the Northwest Redevelopment Infrastructure Project.

Purchased refrigerators, ranges and air conditioners, in addition to renovation of bathrooms and kitchens for Housing Authority projects.

Reaffirmed the following Master Plans:

Riverside Park, Sailboat Bend, Tarpon River, River Oaks-Croissant Park, Victoria Park, Dorsey Riverbend, Riverland, Edgewood, Rio Vista, Colee Hammock and Coral Ridge Isles

Held the Sistrunk Charrette to help plan the N.W. 5th Street Redevelopment and Sistrunk Boulevard Area Revitalization projects.

Held public input sessions and presentations on the conceptual design plan for the beach improvements. The City Commission approved the conceptual design and directed consultant Edward D. Stone, Jr. and Associates to proceed with the actual design.

Completed Master Plan and model for the International Swimming Hall of Fame complex.

The ISHOF Corporation committed to raise \$3,600,000 for new museum exhibits and capital improvements, and an additional \$2 million endowment to insure adequate maintenance.

Began work on a master plan for the Arts and Science District.

Secured a \$40,000 grant from National Endowment of the Arts for development of the Riverwalk Design Guidelines.

Completed an Architectural and Historical Survey of Southeast Fort Lauderdale and secured a matching grant from the State to do a similar survey of Southwest Fort Lauderdale.

Coordinated the effort to create Fort Lauderdale's first neighborhood historic district in Sailboat Bend.

Achieved national recognition of the Holiday Park Tennis Center as one of the ten best public tennis centers in the country by "Tennis Magazine".

1988/89

Approved the Central Beach Action Plan which will allow redevelopment of the beach to occur by meeting stringent concurrency regulations set under State Comprehensive Planning Law.

Started a not-for-profit corporation to promote and raise funds for the Riverwalk project.

Established a Community Redevelopment Plan and subsequently proposed and developed consensus on a Redevelopment Plan for the Central Beach area.

Platted the Birch/Las Olas parking lot in advance of concurrency requirements to reserve the City's right to develop that property.

Developed and completed the first Action Plan approved by the County Commission to reserve credit for traffic capacity so that the central Beach can be redeveloped in accordance with State Comprehensive planning requirements.

PARKS & RECREATION G.O.B. PROJECTS 1987-1991  
(Completed or will be completed in 1991)

All projects were conducted with community and neighborhood input.

Mills Pond Park	5-field softball complex
Snyder Park	Large Picnic Pavilion
Holiday Park	Land purchase Renovation of Activity Center Lighted clay court at Tennis Center Renovation and expansion of Seniors Center
George English Park	Renovation and expansion of Community/ Recreation Center New Tennis practice wall

Sunset Park	Renovation of existing buildings New playground
Lauderdale Manors Park	Upgrade site and landscaping Playground apparatus
Bass Park	New community center
Floranada Park	Renovation of pavilion New play apparatus and playground Parking lot
Bayview Park	Expand and renovate stage Add sod, lighting and water fountains at ballfield New playground apparatus
Major Lauderdale Park	New park
Guthrie Blake Park	New playground
Warfield Park	Improvements to existing buildings and landscaping New play apparatus
Virginia Young Park	New landscaping
Sunland Park	Renovation and expansion of Community/ Recreation Center
Provident Park	New park
Lincoln Park	Purchase new land Totally redevelop park
Floyd Hill Stadium	Parking lot
Riverside Park	New playground, walkways and patio
Bennett Progresso Park	New playground apparatus, fencing, sod and landscaping
Lauderdale Park	New park with burned stage area
Greenfield Park	New park
Flamingo Park	New playground apparatus

Upgrade in conjunction with neighborhood:

Rio Vista Park  
Tarpon River Park  
Riverland Park  
Hortt Park  
Harbordale Park  
Sweeting Park

### PUBLIC SAFETY ACCOMPLISHMENTS 1985-1989

#### 1985/86

Developed a program of informing homeowners associations of crime incidents and patterns in their neighborhoods.

Implemented an Action Plan to provide intensive police attention in the Holiday Park/Victoria Park area, reducing crime by 50%

Made 394 arrests in the Northwest Raiders' effort to combat street level drug dealing.

Developed a Prostitution Enforcement Team and made 1,000 prostitution arrests.

Developed a Mission Statement for each individual unit in the Special Services Division.

Improved selective enforcement by the Traffic Division which resulted in a 6% decrease in serious accidents.

#### 1986/87

Developed Community Policing Unit, a new concept aimed at reducing crime by working with citizens to solve problems and improve the quality of life in target neighborhoods. Assigned the unit to the Sailboat Bend and Riverside Park neighborhoods with excellent results.

Developed a Uniform Walking Team to patrol the beach and encourage merchants and citizens to join with police in combating street crime and resolving crime related issues.

Developed a Code Enforcement Unit involving City Building and Zoning officials, Fire Department inspectors, and State Hotel and Restaurant agents to deal with slumlords and halt the deterioration of inner city neighborhoods.

Increased arrests by Northwest Raiders, a street level narcotics unit, by 78% in its effort to stem the crack cocaine epidemic.

1987/88

Implemented "Safe Streets" action plan which targeted street level violence through removal of illegal weapons from criminals.

Provided "Crime Prevention Through Environmental Design" recommendations and support for neighborhood and business organizations.

Developed School Resource Officer Program for middle and high schools in the City to deal with problems in schools and surrounding neighborhoods.

Organized the City-wide Hazardous Materials Task Team to coordinate hazardous materials spills incidents, Fire and Utilities Department inspection programs, and City-wide compliance with all pertinent environmental laws, rules and regulations.

1988/89

Opened a new sub-station on the beach furnished and equipped by community and business leaders.

Began operating a mobile sub-station to provide a meeting place for residents and Community Policing Officers in various neighborhoods throughout the City.

Participated in "Operation CRADLE," a county-wide drug task force, which polices narcotic offenses occurring within 1,000 feet of schools.

Instituted the Community Policing Unit in several neighborhoods, including South Middle River and Lauderdale Manors.

Opened a Northwest Police Sub-station on Sistrunk Boulevard.

Institute a 5 Year Police Plan.

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# FORT LAUDERDALE 1994

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*In 1984 City officials adopted the following Mission Statement setting a goal for Fort Lauderdale to be the best City of its size in America by 1994 and recognized as such:*

Fort Lauderdale has the feel of a City much larger in size, perhaps because it serves as the business, cultural, governmental and financial center of a County of 1.4 million residents. Certainly no other City of its size can boast of the cultural facilities it has to offer, including two fine theaters of the performing arts that regularly feature current Broadway plays and musicals, national dance companies, major opera productions and a fine symphony orchestra.

It's no wonder that the City has become a favorite destination of the cosmopolitan traveler. Only America's biggest cities can compete with Fort Lauderdale when it comes to fine dining, luxury hotels, haute couture shopping and entertainment. And none of those cities can compete with the climate, miles of beaches, or the safety of its streets.

Those same features that appeal to the sophisticated traveler are also drawing conventions to Fort Lauderdale in record numbers. The construction of the convention center and several spectacular hotels in the beach area in the late eighties was instrumental in making Fort Lauderdale popular with conventioners.

While strengthening the tourism industry, Fort Lauderdale wisely put even more effort into diversifying its economic base. The film industry has become an important part of the City's economy and the area surrounding the Executive Airport contains the largest concentration of clean, hi-tech industrial operations in South Florida. The City is rapidly becoming an international trade and distribution center due to the unique cluster of transportation facilities at its southern border. An industrial complex south of State Road 84 is emerging to serve that transportation corridor. The infrastructure and transportation network needed to adequately serve the business sector is in place.

Fort Lauderdale's municipal government is respected throughout the country as a model of accessibility and responsiveness. The City stresses the importance of two-way communication with its residents and quick, courteous response to their problems. With its long history of political stability, responsible government and low taxes, Fort Lauderdale has the type of business climate that today's corporations are seeking. Nowhere is this more evident than in the downtown area.

Once but a dream, the redevelopment of the City's central business district has exceeded everyone's expectations. Downtown Fort Lauderdale is home to the regional, international and corporate headquarters of some of the world's most prestigious companies. The downtown is no longer deserted on evenings or weekends, thanks in part to expanded class schedules at the BCC and FAU campuses, new townhouse and apartment complexes in the area north of City Hall, and the popularity of weekend events at the City's parking garage and the Main Library. Of course, many of the weekend and evening visitors come simply to enjoy a stroll along the Riverwalk or soak up the old Florida atmosphere of the Historic District. The only question that remains is when and where the expansion of the downtown district will stop.

As new businesses moved into the City, the need for housing for workers of all income levels and quality education for their children became essential. Neighborhood schools and an array of private schools fulfill the latter need. The northwest redevelopment project has provided additional housing for the City's moderate income residents over the past decade and is nearing completion. Great care has been taken to protect the integrity of residential neighborhoods. Neighborhoods that were once on the decline have been revitalized and have made Fort Lauderdale affordable for the middle class family once again. The Sailboat Bend and Riverside areas, in particular, have developed into unique residential neighborhoods of distinctive character.

The people who live in these and the rest of the City's neighborhoods are proud of the town they live in and take an active role in protecting and building upon its best features. They treasure the parks, the tree-lined streets, the tropical colors, the waterways and the history that make it so distinctly different from most South Florida communities. In fact, there has been a resurgence in the City's fondness for its most dominant physical feature — its miles of waterways, rivers and beaches. With a foothold in the past, but prepared for an exciting future, the City and its residents consider Fort Lauderdale to be, truly, the Venice of America.

General Obligation Bond Projects

To establish a working structure for management of the Bond projects and to provide a means for citizen input, a staff Steering Committee was formed, and the City Commission appointed members to a Citizens Committee and six Citizen Sub-Committees. Project Managers were chosen, and they, in turn, prepared management plans for each project and timetables for implementation. Now as that implementation process begins, the challenge is to transform individual ideas into a collective goal towards the realization of successful GOB projects.

Parks and Recreation

\$ 7,295,000

Improvements will be made to several major parks and various smaller neighborhood parks under this Bond category, in addition to beautification of interstate entryways, medians, and right-of-ways throughout the City.

- Lake Lauderdale Phase II
- Sunland Park
- Holiday Park
- Neighborhood Parks Renovation
- Snyder Park
- I-95 Entranceways Landscaping
- George English Park
- Master Tree Plan Implementation

\$ 7,451,000

Riverwalk

This category includes renovation of the sidewalks in the Historic District and construction of a public plaza on Brickell Avenue linked by a beautifully landscaped Riverwalk along the New River.

- Brickell Avenue
- Riverwalk Linear Park
- Riverwalk Land Acquisition
- Historic District Sidewalks

\$ 6,859,000

Neighborhood Revitalization

The need to revitalize specific City areas will be addressed under this category as citizens and staff work together to improve the quality and conditions of neighborhoods.

- Near Northwest Redevelopment Infrastructure
- Housing Authority Capital Improvements
- Neighborhood Master Plan
- Sistrunk Boulevard Area Revitalization
- Northwest 5th Street Redevelopment

\$13,787,000

Beach Revitalization

Redevelopment of the specific beach area described under this GOB category will address pedestrian, traffic, and parking concerns in conjunction with improvements to enhance the aesthetic appearance and recreational usage of the beach.

- A-1-A Reconstruction and Beach Promenade
- Birch Road/Seabreeze Boulevard Improvements
- Side Street Parking

\$ 1,198,000

International Swimming Hall of Fame

The project scope is for the expansion and renovation of the existing Hall of Fame Museum.

\$ 8,110,000

Discovery Center

This project is for the construction of a regional Science Museum and a state-of-the-art IMAX Theater.

TOTAL General Obligation Bond Funds . . . . . \$44,700,000



City of Fort Lauderdale • Procurement Services Department  
100 N. Andrews Avenue, #619 • Fort Lauderdale, Florida 33301  
954-828-5933 FAX 954-828-5576  
[purchase@fortlauderdale.gov](mailto:purchase@fortlauderdale.gov)

## ADDENDUM NO. 4

RFP 705-10541  
CONSULTING SERVICES FOR VISIONING PROJECT

ISSUED September 28, 2010

1. Part III, Section 19 Insurance, Professional Liability is changed to read:

Professional Liability (Errors & Omissions)

Consultants

Limits: \$500,000 per occurrence \$2,000,000 aggregate with defense costs in addition to limits.

2. Part VI – Requirements of the Proposal is changed to read:

Proposers must submit an identified original plus eleven (11) copies of the proposal including any attachments, as well as a CD copy.

The above requirement totals twelve (12) paper copies of your proposal and one electronic copy submitted on a CD.

3. All other terms, conditions, and specifications remain unchanged.

Kirk W. Buffington, CPPO, C.P.M.  
Director of Procurement Services

Company  
Name

AECOM Technical Services, Inc.

(please print)

Bidder's  
Signature:

Date:

October 4, 2010

## Suppliers that have Viewed Bid #705-10541 - Consulting Services for Visioning Project

RESPONDED	SUPPLIER	CITY	STATE	QUALIFICATIONS	DATE FIRST VIEWED	DATE MOST RECENTLY VIEWED	DOWNLOAD
	<a href="#">242_architecture_+_design</a>	Mascotte	FL		Sep 11, 2010 11:34:06 AM EDT	Sep 11, 2010 11:37:08 AM EDT	Yes
	<a href="#">ACP_Visioning_+Planning</a>	New York	NY		Sep 9, 2010 5:23:07 PM EDT	Sep 28, 2010 8:22:02 AM EDT	Yes
	<a href="#">AECOM</a>	Atlanta	GA		Sep 9, 2010 6:12:31 PM EDT	Sep 9, 2010 6:14:31 PM EDT	Yes
	<a href="#">All_Vision,_LLC</a>	Greenwood Village	CO		Sep 22, 2010 2:39:54 PM EDT	Sep 22, 2010 2:39:54 PM EDT	No
	<a href="#">AmericaSpeaks</a>	Washington	DC		Sep 9, 2010 4:17:24 PM EDT	Sep 23, 2010 12:52:49 PM EDT	Yes
	<a href="#">Amy_McGreger</a>	Orlando	FL		Sep 11, 2010 8:19:59 PM EDT	Sep 11, 2010 8:24:07 PM EDT	Yes
	<a href="#">Analytica</a>	newberry	FL		Sep 10, 2010 9:26:09 AM EDT	Sep 10, 2010 9:27:53 AM EDT	Yes
	<a href="#">Approgence Technologies_Inc</a>	Irvine	CA		Sep 22, 2010 1:19:37 PM EDT	Sep 23, 2010 8:49:17 PM EDT	No
	<a href="#">Ascentium</a>	Los Angeles	CA		Sep 22, 2010 5:03:06 PM EDT	Sep 22, 2010 5:03:28 PM EDT	Yes
	<a href="#">ASK_Development Solutions,_Inc</a>	Royal Palm Beach	FL		Sep 22, 2010 5:30:27 AM EDT	Sep 22, 2010 5:42:13 AM EDT	Yes
	<a href="#">Atech Fire &amp; Security_Inc</a>	Pompano Beach	FL	<a href="#">SB</a>	Sep 22, 2010 11:53:24 AM EDT	Sep 22, 2010 11:53:24 AM EDT	No
	<a href="#">BAUER_AND_WILEY_Architects</a>	Newport Beach	CA		Sep 9, 2010 4:32:25 PM EDT	Sep 9, 2010 4:32:47 PM EDT	Yes
	<a href="#">BBP &amp; Associates</a>	Annapolis	MD		Sep 10, 2010 1:45:54 PM EDT	Sep 10, 2010 1:46:09 PM EDT	Yes
	<a href="#">Bermello Ajamil and Partners_Inc.</a>	Miami	FL	<a href="#">MBE</a>	Sep 13, 2010 9:48:08 AM EDT	Sep 13, 2010 9:51:49 AM EDT	Yes
	<a href="#">Betancourt Castellon Associates</a>	Miami	FL		Sep 27, 2010 11:44:24 AM EDT	Sep 27, 2010 11:44:24 AM EDT	No
	<a href="#">Bettman Leadership &amp; Development</a>	Mountain View	CA		Sep 13, 2010 9:27:23 PM EDT	Sep 24, 2010 11:44:33 AM EDT	Yes
	<a href="#">Bid_Ocean,_Inc</a>	Grand Junction	CO		Sep 15, 2010 4:54:11 AM EDT	Sep 15, 2010 4:57:46 AM EDT	Yes
	<a href="#">BLU MOON Group.</a>	Santa Monica	CA		Sep 9, 2010 6:51:28	Sep 23, 2010 4:07:41 PM EDT	Yes



<a href="#">GMTS Floria, LLC</a>	Jacksonville	FL	Sep 13, 2010 10:28:53 PM EDT	Sep 13, 2010 10:28:53 PM EDT	No
<a href="#">Coastal Construction</a>	Palm Beach Gardens	FL	Sep 21, 2010 2:04:15 PM EDT	Sep 21, 2010 2:04:15 PM EDT	No
<a href="#">ConnVertex Technologies Inc.</a>	Sandy	UT	Sep 9, 2010 3:59:13 PM EDT	Sep 22, 2010 6:15:12 PM EDT	Yes
<a href="#">corradinogroup</a>	MIAMI	FL	Sep 9, 2010 4:00:22 PM EDT	Sep 9, 2010 4:06:13 PM EDT	Yes
<a href="#">CSA Group</a>	Miami	FL	Sep 9, 2010 5:08:40 PM EDT	Sep 9, 2010 5:12:41 PM EDT	Yes
<a href="#">Cygnet Strategies</a>	East Helena	MT	Sep 9, 2010 5:41:12 PM EDT	Sep 9, 2010 5:41:33 PM EDT	Yes
<a href="#">Delta Development Group, Inc.</a>	Mechanicsburg	PA	Sep 9, 2010 4:43:21 PM EDT	Sep 9, 2010 4:44:47 PM EDT	Yes
<a href="#">Demarche Consulting Group, Inc.</a>	Seattle	WA	Sep 9, 2010 6:21:24 PM EDT	Sep 9, 2010 6:21:24 PM EDT	No
<a href="#">DKP</a>	Coral Gables	FL	Sep 15, 2010 10:51:49 AM EDT	Sep 15, 2010 10:52:02 AM EDT	Yes
<a href="#">Douglas Wood &amp; Associates, Inc.</a>	Coral Gables	FL	Sep 10, 2010 8:35:58 AM EDT	Sep 10, 2010 8:36:19 AM EDT	Yes
<a href="#">e.Republic</a>	Folsom	CA	Sep 24, 2010 1:11:39 PM EDT	Sep 24, 2010 1:25:09 PM EDT	Yes
<a href="#">EDSA</a>	Fort Lauderdale	FL	Sep 27, 2010 4:47:25 PM EDT	Sep 27, 2010 4:52:29 PM EDT	Yes
<a href="#">Eclipse Corp.</a>	Pleasanton	CA	Sep 9, 2010 4:25:21 PM EDT	Sep 9, 2010 4:26:17 PM EDT	Yes
<a href="#">entram corp</a>	Port Charlotte	FL	Sep 10, 2010 7:38:58 AM EDT	Sep 23, 2010 6:51:44 AM EDT	Yes
<a href="#">ENVIRONMENTAL CONTROL INC</a>	FORT LAUDERDALE	GA	Sep 10, 2010 1:29:16 PM EDT	Sep 10, 2010 1:29:16 PM EDT	No
<a href="#">Envirotech, Inc.</a>	Vandalia	IL	Sep 10, 2010 12:44:12 PM EDT	Sep 24, 2010 11:40:12 AM EDT	Yes
<a href="#">EPI-USE America, Inc. [Ad]</a>	Atlanta	GA	Sep 9, 2010 7:11:00 PM EDT	Sep 22, 2010 1:48:11 PM EDT	No
<a href="#">Eric Schulz Consulting Services</a>	Erda	UT	Sep 23, 2010 7:23:53 PM EDT	Sep 23, 2010 7:23:53 PM EDT	No
<a href="#">EVAXX, Inc.</a>	New York	NY	Sep 10, 2010 12:08:14 PM EDT	Sep 10, 2010 12:08:48 PM EDT	Yes
<a href="#">Falkanger Snyder</a>					

<a href="#">Martineau &amp; Yates, Architects &amp; Engineers, Inc.</a>	Fort Lauderdale	FL	Sep 13, 2010 9:14:41 AM EDT	Sep 24, 2010 7:30:08 AM EDT	Yes
<a href="#">FIU Metropolitan Center</a>	Miami	FL	Sep 13, 2010 1:46:41 PM EDT	Sep 28, 2010 9:32:03 AM EDT	Yes
<a href="#">FMT Systems Inc.</a>	San Francisco	CA	Sep 9, 2010 4:32:19 PM EDT	Sep 9, 2010 4:35:02 PM EDT	Yes
<a href="#">Fowler Enterprises</a>	Santa Monica	CA	Sep 18, 2010 1:48:15 PM EDT	Sep 18, 2010 1:48:15 PM EDT	No
<a href="#">FOX Systems, Inc.</a>	Scottsdale	AZ	Sep 9, 2010 4:13:00 PM EDT	Sep 9, 2010 4:15:03 PM EDT	Yes
<a href="#">Fregonese Associates, Inc.</a>	Portland	OR	Sep 10, 2010 12:22:28 PM EDT	Sep 20, 2010 6:46:10 PM EDT	Yes
<a href="#">geographII</a>	Lancaster	PA	Sep 9, 2010 4:00:56 PM EDT	Sep 28, 2010 11:15:49 AM EDT	Yes
<a href="#">Glattig Jackson Kercher Anglin, Inc.</a>	Orlando	FL	Sep 23, 2010 3:03:37 PM EDT	Sep 23, 2010 3:05:13 PM EDT	Yes
<a href="#">Glattig Jackson Kercher Anglin, Inc.</a>	Orlando	FL	Sep 13, 2010 1:27:03 PM EDT	Sep 28, 2010 10:51:31 AM EDT	Yes
<a href="#">Goaltrac</a>	Detroit	MI	Sep 9, 2010 7:44:36 PM EDT	Sep 9, 2010 7:46:10 PM EDT	Yes
<a href="#">Gould Evans</a>	Kansas City	MO	Sep 9, 2010 3:56:16 PM EDT	Sep 9, 2010 3:58:15 PM EDT	Yes
<a href="#">Grant Thornton LLP</a>	San Antonio	TX	Sep 9, 2010 4:06:50 PM EDT	Sep 27, 2010 2:11:39 PM EDT	No
<a href="#">GSD Southeast Consulting, Inc.</a>	Coral Springs	FL	Sep 23, 2010 11:23:55 AM EDT	Sep 28, 2010 8:27:35 AM EDT	Yes
<a href="#">Guidon Performance Solutions</a>	Mesa	AZ	Sep 14, 2010 9:59:15 AM EDT	Sep 14, 2010 9:59:38 AM EDT	Yes
<a href="#">Hellman</a>	Waterloo	IA	Sep 9, 2010 4:40:30 PM EDT	Sep 9, 2010 4:41:11 PM EDT	Yes
<a href="#">HighBeam Marketing, LLC</a>	El Segundo	CA	Sep 9, 2010 8:57:47 PM EDT	Sep 9, 2010 9:00:06 PM EDT	Yes
<a href="#">HOK, Inc.</a>	Houston	TX	Sep 10, 2010 12:41:04 PM EDT	Sep 27, 2010 1:36:41 PM EDT	Yes
<a href="#">Holistic Planning Group</a>	Boca Raton	FL	Sep 14, 2010 2:41:08 PM EDT	Sep 23, 2010 1:46:38 PM EDT	Yes
<a href="#">Hurley-Franks and Associates</a>	Philadelphia	PA	Sep 20, 2010 10:03:23 AM EDT	Sep 23, 2010 11:53:25 AM EDT	Yes

<u>IBI Group</u>	Pompano Beach	FL	Sep 24, 2010 11:58:17 AM EDT	Sep 28, 2010 8:49:54 AM EDT	Yes
<u>IBI Group, Inc.</u>	Pompano Beach	FL	Sep 9, 2010 4:31:31 PM EDT	Sep 28, 2010 9:48:25 AM EDT	Yes
<u>ICF Consulting</u>	Fairfax	VA	Sep 15, 2010 10:40:00 AM EDT	Sep 16, 2010 10:37:52 AM EDT	Yes
<u>Ideation • Collaborative</u>	Saratoga	CA	Sep 17, 2010 4:09:34 PM EDT	Sep 17, 2010 4:09:46 PM EDT	Yes
<u>ILPP</u>	Berkeley	CA	Sep 9, 2010 7:30:03 PM EDT	Sep 9, 2010 7:30:03 PM EDT	No
<u>IMS</u>	San Diego	CA	Sep 9, 2010 4:18:53 PM EDT	Sep 10, 2010 1:42:49 PM EDT	Yes
<u>Individual Development Project, LLC</u>	New York	NY	Sep 22, 2010 10:16:29 AM EDT	Sep 22, 2010 10:16:40 AM EDT	Yes
<u>Infinitas Health</u>	Boca Raton	FL	Sep 10, 2010 3:24:30 PM EDT	Sep 23, 2010 2:16:18 PM EDT	Yes
<u>Informatrix, Inc.</u>	Sacramento	CA	Sep 9, 2010 4:23:49 PM EDT	Sep 9, 2010 4:23:56 PM EDT	Yes
<u>INgage Networks</u>	Naples	FL	Sep 16, 2010 9:25:23 AM EDT	Sep 28, 2010 11:19:06 AM EDT	Yes
<u>Innovative Direct Response, LLC</u>	IRVINE	CA	Sep 14, 2010 3:27:35 PM EDT	Sep 14, 2010 5:47:04 PM EDT	Yes
<u>Innovative Government [Ad]</u>	Sacramento	CA	Sep 16, 2010 12:47:47 AM EDT	Sep 16, 2010 12:47:47 AM EDT	No
<u>Insightful Solutions, Inc.</u>	Fallbrook	CA	Sep 9, 2010 6:02:09 PM EDT	Sep 9, 2010 6:51:47 PM EDT	Yes
<u>Integrate, Inc.</u>	Columbus	OH	Sep 9, 2010 4:05:12 PM EDT	Sep 9, 2010 4:06:48 PM EDT	Yes
<u>Interaction Alliance</u>	Carson City	NV	Sep 13, 2010 3:18:11 PM EDT	Sep 13, 2010 3:18:26 PM EDT	Yes
<u>International Design Engineering and Architecture</u>	Aventura	FL	Sep 22, 2010 2:23:49 PM EDT	Sep 22, 2010 2:23:49 PM EDT	No
<u>Jack Pinkowski, Ph.D.</u>	Plantation	FL	Sep 13, 2010 10:32:05 AM EDT	Sep 13, 2010 10:38:20 AM EDT	Yes
<u>Jane Kow &amp; Associates</u>	San Francisco	CA	Sep 24, 2010 2:35:01 PM EDT	Sep 24, 2010 2:35:01 PM EDT	No
<u>Keith and Schnars, P.A.</u>	Ft Lauderdale	FL	Sep 10, 2010 3:27:54 PM EDT	Sep 28, 2010 10:17:10 AM EDT	Yes
<u>Kelapire</u>	Weston	FL	Sep 15, 2010 11:18:47 AM EDT	Sep 15, 2010 11:21:17 AM EDT	Yes

<u>Consulting</u>				AM EDT				
<u>Kenneth Murray</u>	Chicago	IL	Sep 13, 2010 8:54:36 AM EDT	Sep 28, 2010 8:54:39 AM EDT	Yes			
<u>Kidd &amp; Company, Inc.</u>	Tallahassee	FL	Sep 10, 2010 9:43:12 AM EDT	Sep 23, 2010 3:44:44 PM EDT	Yes			
<u>Kitty O. Enterprises, Inc.</u>	Fort Lauderdale	FL	Sep 9, 2010 4:49:53 PM EDT	Sep 9, 2010 4:56:06 PM EDT	Yes			
<u>KVH Architects</u>	Miami	FL	Sep 9, 2010 6:43:13 PM EDT	Sep 10, 2010 10:38:33 AM EDT	Yes			
<u>Lambert Advisory, LLC</u>	Miami	FL	Sep 9, 2010 3:59:07 PM EDT	Sep 9, 2010 3:59:24 PM EDT	Yes			
<u>Land Design South</u>	West Palm Beach	FL	Sep 13, 2010 10:53:32 AM EDT	Sep 13, 2010 10:53:53 AM EDT	Yes			
<u>LaRue Planning &amp; Management Services, Inc.</u>	Fort Myers	FL	Sep 17, 2010 3:36:25 PM EDT	Sep 17, 2010 3:39:54 PM EDT	Yes			
<u>Leading Resources Inc.</u>	Sacramento	CA	Sep 15, 2010 2:03:35 PM EDT	Sep 15, 2010 2:03:35 PM EDT	No			
<u>Lewis, Longman Walker, P.A.</u>	West Palm Beach	FL	Sep 9, 2010 4:53:29 PM EDT	Sep 9, 2010 4:57:27 PM EDT	Yes			
<u>Lights Go Green LLC - Iza Environment Corp.</u>	Hollywood	FL	Sep 24, 2010 4:10:26 PM EDT	Sep 24, 2010 4:10:26 PM EDT	No			
<u>Lone Star Aluminum, Inc.</u>	Port St. Lucie	FL	Sep 21, 2010 1:13:01 PM EDT	Sep 21, 2010 1:13:01 PM EDT	No			
<u>Luke Planning, Inc.</u>	Jacksonville	FL	Sep 15, 2010 4:56:50 PM EDT	Sep 15, 2010 5:06:48 PM EDT	Yes			
<u>M. Gill &amp; Associates, Inc.</u>	Miami	FL	Sep 10, 2010 9:48:06 AM EDT	Sep 10, 2010 9:50:53 AM EDT	Yes			
<u>Marga Incorporated</u>	New York	NY	Sep 27, 2010 12:59:00 PM EDT	Sep 27, 2010 1:43:51 PM EDT	Yes			
<u>Marlin Engineering, Inc.</u>	Miami	FL	Sep 20, 2010 3:11:45 PM EDT	Sep 20, 2010 3:11:55 PM EDT	Yes			
<u>Mathematica Policy Research, Inc.</u>	Princeton	NJ	Sep 9, 2010 4:04:16 PM EDT	Sep 9, 2010 4:45:29 PM EDT	Yes			
<u>Matrix Design Group, Inc.</u>	Phoenix	AZ	Sep 10, 2010 4:30:20 PM EDT	Sep 10, 2010 4:43:20 PM EDT	Yes			
<u>McCann Associates</u>	Ewing	NJ	Sep 15, 2010 1:28:42 PM EDT	Sep 15, 2010 1:28:42 PM EDT	No			
<u>meriton international</u>	Washington	DC	Sep 20, 2010 1:28:43 PM EDT	Sep 20, 2010 1:29:02 PM EDT	Yes			

<u>MESA</u>	Dallas	TX	Sep 17, 2010 11:31:31 AM EDT	Sep 17, 2010 11:31:43 AM EDT	Yes
<u>MGT of America</u>	Tallahassee	FL	Sep 13, 2010 2:46:40 PM EDT	Sep 13, 2010 2:47:09 PM EDT	Yes
<u>MGT of America, Inc.</u>	Sacramento	CA	Sep 9, 2010 4:02:48 PM EDT	Sep 9, 2010 4:02:58 PM EDT	Yes
<u>Michael Greenle</u>	Miami Beach	FL	Sep 21, 2010 12:54:17 PM EDT	Sep 21, 2010 4:35:34 PM EDT	Yes
<u>Moule &amp; Polyzoides Architects and Urbanists</u>	Pasadena	CA	Sep 10, 2010 12:23:26 PM EDT	Sep 10, 2010 12:24:12 PM EDT	Yes
<u>MR+E</u>	Culver City	CA	Sep 9, 2010 5:34:50 PM EDT	Sep 9, 2010 5:34:50 PM EDT	No
<u>Olive Grove Consulting, LLC</u>	Belmont	CA	Sep 10, 2010 1:42:23 AM EDT	Sep 10, 2010 1:43:34 AM EDT	Yes
<u>OpenSky Learning, Inc</u>	Nevada City	CA	Sep 9, 2010 4:31:54 PM EDT	Sep 9, 2010 4:34:08 PM EDT	No
<u>Orion Development Group</u>	Rockaway Park	NY	Sep 20, 2010 10:40:37 AM EDT	Sep 20, 2010 10:40:46 AM EDT	Yes
<u>PBSJ</u>	Miami	FL	Sep 10, 2010 6:35:35 AM EDT	Sep 10, 2010 6:35:47 AM EDT	Yes
<u>PennPraxis</u>	Philadelphia	PA	Sep 22, 2010 2:45:24 PM EDT	Sep 28, 2010 9:13:42 AM EDT	Yes
<u>Peritas Solutions Ltd</u>	Calgary	AB	Sep 9, 2010 4:27:07 PM EDT	Sep 9, 2010 4:30:48 PM EDT	Yes
<u>Perkins+Will</u>	Coral Gables	FL	Sep 9, 2010 4:20:02 PM EDT	Sep 9, 2010 4:20:30 PM EDT	Yes
<u>PlanNet Consulting</u>	Brea	CA	Sep 23, 2010 11:55:43 AM EDT	Sep 23, 2010 11:55:43 AM EDT	No
<u>PMCM2 LLC</u>	Ft Lauderdale	FL	Sep 17, 2010 5:22:19 PM EDT	Sep 21, 2010 10:07:38 AM EDT	Yes
<u>PMG Associates, Inc.</u>	Deerfield Beach	FL	Sep 16, 2010 11:10:00 AM EDT	Sep 23, 2010 1:43:46 PM EDT	Yes
<u>PositivEnergy Practice</u>	Chicago	IL	Sep 9, 2010 4:01:22 PM EDT	Sep 9, 2010 4:01:34 PM EDT	Yes
<u>Precise Paving, Inc.</u>	West Palm Beach	FL	Sep 10, 2010 1:24:06 PM EDT	Sep 10, 2010 1:24:19 PM EDT	No
<u>Prime-Vendor, Inc.</u>	Wilmington	NC	Sep 9, 2010 3:15:20 PM EDT	Sep 27, 2010 1:55:31 PM EDT	Yes
<u>Proofpoint Systems, Inc.</u>	Los Altos	CA	Sep 9, 2010 8:27:40 PM EDT	Sep 9, 2010 8:37:13 PM EDT	Yes

<u>PROS Consulting</u>	Dallas	TX	Sep 9, 2010 5: 15: 03 PM EDT	Sep 9, 2010 5: 15: 03 PM EDT	No
<u>PRR, Inc.</u>	Seattle	WA	Sep 9, 2010 5: 17: 12 PM EDT	Sep 9, 2010 5: 20: 38 PM EDT	Yes
<u>Pursuit of Excellence, Inc.</u>	Dallas	TX	Sep 9, 2010 5: 15: 31 PM EDT	Sep 9, 2010 5: 16: 14 PM EDT	Yes
<u>QuantEM Laboratories, LLC</u>	Oklahoma City	OK	Sep 9, 2010 4: 32: 05 PM EDT	Sep 9, 2010 4: 32: 05 PM EDT	No
<u>QuantumMark, LLC</u>	Reno	NV	Sep 10, 2010 11: 40: 01 AM EDT	Sep 10, 2010 11: 43: 24 AM EDT	Yes
<u>RAND Corporation</u>	Arlington	VA	Sep 13, 2010 11: 52: 09 AM EDT	Sep 28, 2010 11: 10: 49 AM EDT	Yes
<u>RE Chisholm Architects, Inc.</u>	Miami	FL	Sep 10, 2010 8: 20: 47 AM EDT	Sep 10, 2010 8: 20: 56 AM EDT	Yes
<u>Renker Eich Parks Architects</u>	St Petersburg	FL	Sep 20, 2010 12: 36: 18 PM EDT	Sep 27, 2010 3: 09: 37 PM EDT	Yes
<u>ReUrbanism</u>	San Diego	CA	Sep 9, 2010 6: 09: 05 PM EDT	Sep 9, 2010 6: 11: 42 PM EDT	Yes
<u>Rivera, Sierra &amp; Company, Inc.</u>	Brooklyn	NY	Sep 9, 2010 4: 05: 25 PM EDT	Sep 28, 2010 8: 29: 18 AM EDT	Yes
<u>RNR Consulting</u>	Cleveland	OH	Sep 9, 2010 3: 56: 38 PM EDT	Sep 9, 2010 3: 57: 00 PM EDT	Yes
<u>S&amp;D Engineering and construction Inc</u>	Margate	FL	Sep 10, 2010 12: 03: 14 AM EDT	Sep 10, 2010 12: 03: 14 AM EDT	No
<u>Safety Solution Resources</u>	Poulsbo	WA	Sep 9, 2010 4: 17: 15 PM EDT	Sep 9, 2010 4: 17: 15 PM EDT	No
<u>SageRock, Inc.</u>	Akron	OH	Sep 10, 2010 9: 16: 30 AM EDT	Sep 10, 2010 9: 17: 15 AM EDT	Yes
<u>Skumatz Economic Research Associates Inc.</u>	Longmont	CO	Sep 13, 2010 12: 05: 04 PM EDT	Sep 13, 2010 12: 05: 20 PM EDT	Yes
<u>Split Rock Consulting, Inc.</u>	Sun Prairie	WI	Sep 28, 2010 7: 54: 20 AM EDT	Sep 28, 2010 8: 36: 57 AM EDT	Yes
<u>STA Consulting DBA The Curtiss Group</u>	Sunrise	FL	Sep 10, 2010 10: 45: 44 AM EDT	Sep 10, 2010 10: 48: 41 AM EDT	Yes
<u>Staff Tech, Inc.</u>	Folsom	CA	Sep 22, 2010 6: 18: 09 PM EDT	Sep 22, 2010 6: 18: 09 PM EDT	No
<u>Stallman Communications</u>	Oakland	CA	Sep 10, 2010 12: 17: 02 AM EDT	Sep 10, 2010 12: 17: 02 AM EDT	No
<u>SWA Consulting</u>	Raleigh	NC	Sep 27, 2010 11: 35: 43	Sep 27, 2010 11: 43: 17 AM EDT	Yes



<u>Warren A. James Architects + Planners</u>	NEW YORK	NY	Sep 14, 2010 11:28:41 AM EDT	Sep 23, 2010 1:40:36 PM EDT	Yes
<u>Williams Glasco &amp; Associates</u>	Ruston	LA	Sep 9, 2010 4:14:48 PM EDT	Sep 25, 2010 3:22:02 PM EDT	Yes
<u>York Solutions LLC</u>	Jupiter	FL	Sep 20, 2010 12:07:18 PM EDT	Sep 22, 2010 7:23:03 PM EDT	Yes
<u>Zenpex</u>	Dallas	TX	Sep 9, 2010 5:19:45 PM EDT	Sep 9, 2010 5:23:28 PM EDT	Yes
<u>Zyscovich, Inc.</u>	Miami	FL	Sep 22, 2010 2:05:04 PM EDT	Sep 23, 2010 12:27:09 PM EDT	Yes

Qualification Totals: DBE(3) MBE(5) SB(5) WBE(2)

**City of Fort Lauderdale  
GENERAL CONDITIONS**

These instructions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Department. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB) and Request for Proposal (RFP) are interchangeable.

**PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:**

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 30 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.04 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.05 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of ninety (90) days from the date of bid opening unless otherwise stated in the ITB.
- 1.06 VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.

By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared, by the City as conditional.

- 1.07 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.08 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

BLACK, which includes persons having origins in any of the Black racial groups of Africa.

WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

## 1.09 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

## Part II DEFINITIONS/ORDER OF PRECEDENCE:

- 2.01 BIDDING DEFINITIONS** The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:  
INVITATION TO BID (ITB) when the City is requesting bids from qualified Bidders.  
REQUEST FOR PROPOSALS (RFP) when the City is requesting proposals from qualified Proposers.  
BID – a price and terms quote received in response to an ITB.  
PROPOSAL – a proposal received in response to an RFP.  
BIDDER – Person or firm submitting a Bid.  
PROPOSER – Person or firm submitting a Proposal.  
RESPONSIVE BIDDER – A person whose bid conforms in all material respects to the terms and conditions included in the ITB.  
RESPONSIBLE BIDDER – A person who has the capability in all respects to perform in full the contract requirements, as stated in the ITB, and the integrity and reliability that will assure good faith performance.  
FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.  
SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.  
CONTRACTOR – Successful Bidder or Proposer who is awarded a Purchase Order, award Contract, Blanket Purchase Order agreement, or Term Contract to provide goods or services to the City.  
CONTRACT – A deliberate verbal or written agreement between two or more competent parties to perform or not to perform a certain act or acts, including all types of agreements, regardless of what they may be called, for the procurement or disposal of equipment, materials, supplies, services or construction.  
CONSULTANT – Successful Bidder or Proposer who is awarded a contract to provide professional services to the City.  
The following terms may be used interchangeably by the City: ITB and/or RFP; Bid or Proposal; Bidder, Proposer, or Seller; Contractor or Consultant; Contract, Award, Agreement or Purchase Order.
- 2.02 SPECIAL CONDITIONS:** Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

## PART III BIDDING AND AWARD PROCEDURES:

- 3.01 SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidder's should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.
- 3.02 MODEL NUMBER CORRECTIONS:** If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.
- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.

- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Department immediately. Such notification must be received by the Procurement Services Department prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond, postal money order, cashiers check, or irrevocable letter of credit. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond or irrevocable letter of credit, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS:** Florida law provides that municipal records shall at all times be open for personal inspection by any person. Section 119.01, F.S., the Public Records Law. Information and materials received by City in connection with an ITB response shall be deemed to be public records subject to public inspection upon award, recommendation for award, or 10 days after bid opening, whichever occurs first. However, certain exemptions to the public records law are statutorily provided for in Section 119.07, F.S. If the Proposer believes any of the information contained in his or her response is exempt from the Public Records Law, then the Proposer, must in his or her response, specifically identify the material which is deemed to be exempt and cite the legal authority for the exemption. The City's determination of whether an exemption applies shall be final, and the Proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as public records.
- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.

If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.

- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may

arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.

#### **PART IV BONDS AND INSURANCE**

**4.01 PERFORMANCE BOND/IRREVOCABLE LETTER OF CREDIT:** If a performance bond or irrevocable letter of credit is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond or an Unconditional Irrevocable Letter of Credit payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent. If a Letter of Credit is chosen, it must be in a form acceptable to the City, drawn on a local (Broward, Dade or Palm Beach Counties) bank acceptable to the City and issued in favor of the City of Fort Lauderdale, Florida. If a Bidder wishes to use a non-local bank, he must have prior City approval of the requirements to draw against the Letter of Credit.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond or Irrevocable Letter of Credit is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

**4.02 INSURANCE:** If the Contractor is required to go on to City property to perform work or services as a result of ITB award, the Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Department original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an ADDITIONAL INSURED and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

#### **PART V PURCHASE ORDER AND CONTRACT TERMS:**

**5.01 COMPLIANCE TO SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance to bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:

- Bidders name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
- All City Departments being advised to refrain from doing business with the Bidder.
- All other remedies in law or equity.

**5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.

**5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended, and be in compliance with Chapter 442, Florida Statutes. Any toxic substance listed in Section 38F-41.03 of the Florida Administrative Code delivered as a result of this order must be accompanied by a completed Material Safety Data Sheet (MSDS).

**5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.

**5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.

**5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.

**5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.

**5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** The Contractor agrees to protect, defend, indemnify, and hold harmless the City of Fort Lauderdale and its officers, employees and agents from and against any and all losses, penalties, damages, settlements, claims, costs, charges for other expenses, or liabilities of every and any kind including attorneys fees, in connection with or arising directly or indirectly out of the work agreed to or performed by Contractor under the terms of any agreement that may arise due to the bidding process. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable Statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.

- 5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in its best interest as determined by the City, to cancel contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The form of all records and reports shall be subject to the approval of the City's Internal Auditor. The Contractor agrees to make available to the City's Internal Auditor, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports and records relating to this contract for the duration of the contract and retain them for a minimum period of three (3) years beyond the last day of the contract term.
- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at their own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- 5.15 NON-DISCRIMINATION:** There shall be no discrimination as to race, sex, color, creed, age or national origin in the operations conducted under this contract.
- 5.16 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:
1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
  2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
  3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve themselves of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying him for receiving any business from the City for a stated period of time.
- If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.
- 5.17 ELIGIBILITY:** If applicable, the Contractor must first register with the Department of State of the State of Florida, in accordance with Florida State Statutes, prior to entering into a contract with the City.
- 5.18 PATENTS AND ROYALTIES:** The Contractor, without exception, shall indemnify and save harmless the City and its employees from liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including its use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.19 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.20 LITIGATION VENUE:** The parties waive the privilege of venue and agree that all litigation between them in the state courts shall take place in Broward County, Florida and that all litigation between them in the federal courts shall take place in the Southern District in and for the State of Florida.

# Visioning Committee

**MEMBERSHIP:** The committee shall consist of eleven members who reside or work within City corporate limits. A majority of the appointed members shall constitute a quorum. Each member of the city commission shall appoint two members including at least one member from each district and one member by consensus of the city commission. The committee shall commence on December 15, 2009 and terminate on December 31, 2011.

**PURPOSE:** Develop and recommend to the city commission an initial model plan that outlines a process to seek the perspectives of under-represented individuals so that a citywide vision will reflect the hopes and viewpoints of all residents in the City of Fort Lauderdale; and to organize a broad based, community focused process and produce a vision plan for the next century that will guide the city commission in their policy and decision making.

**HISTORY:** Established as a committee by Resolution 09-303.

Member's Name	Appt By	Term Expires	Home Address	Zip	Business Name	Business Address	Zip	Phone #'s	e-mail
Stanley Eichelbaum <b>(Vice Chair)</b>	Seiler	12/31/2011	411 N. New River Dr., E. # 2304	33301	Marketing Developments, Inc.	411 N. New River Dr., E. # 2304	33301	B: 513-607-1274 F: 954-467-1780	<a href="mailto:eichelbaum@comcast.net">eichelbaum@comcast.net</a>
Tim Smith <b>(Chair)</b>	Seiler	12/31/2011							<a href="mailto:commtims@aol.com">commtims@aol.com</a>
Peg Buchan	Rogers	12/31/2011	1530 SE 12th Court	33316	Broward County Port Everglades	1850 Eller Drive	33316	H: 954-463-9458 B: 954-468-0139 F: 954-523-8713	<a href="mailto:pbuchan@broward.org">pbuchan@broward.org</a> or <a href="mailto:dtbuchan@aol.com">dtbuchan@aol.com</a>
Wiley D. Thompson, III	Rogers	12/31/2011			Broward Sheriffs Office			B: 954-321-4181	<a href="mailto:wthompsonIII@aol.com">wthompsonIII@aol.com</a>
					Weiss Serota Helfman Pastoriza Cole & Boniske, P.L.	200 E. Broward Blvd., Ste. 1900	33305	H: 954-563-7028 B: 954-763-4242 F: 954-764-7770	<a href="mailto:agabriel@wsh-law.com">agabriel@wsh-law.com</a>
Alan L. Gabriel	Roberts	12/31/2011	2525 Middle River Drive	33308	Smart Growth Partnership	2823 NE 36th St.	33308	H: 954-565-1263 B: 954-614-5666 F: 954-565-1264	<a href="mailto:gfkatz@prodigy.net">gfkatz@prodigy.net</a>
Gloria Katz	Roberts	12/31/2011	2823 NE 36th St.	33301	Barron Real Estate	2900 N. University Dr., # 26, Coral Springs	33065-5083	B: 954-344-9855 F: 954-344-6688	<a href="mailto:c.b.ladd@att.net">c.b.ladd@att.net</a>
Charles B. Ladd	Rodstrom	12/31/2011	1201 SE 7th St. 1905 N. Ocean Blvd., 16F	33305				H: 954-561-0604	<a href="mailto:csieger@mindspring.com">csieger@mindspring.com</a>
Gary T. Sieger	Rodstrom	12/31/2011	1740 NW 3rd Court	33311				H: 954-730-3004 C: 954-336-1551	<a href="mailto:dgilessmith@yahoo.com">dgilessmith@yahoo.com</a>
Desorae Giles-Smith	DuBose	12/31/2011						H: 954-567-9676 B: 954-765-7399 F: 954-765-7266	<a href="mailto:randall.vitale@suntrust.com">randall.vitale@suntrust.com</a>
Randall Vitale	DuBose	12/31/2011	779 NE 4th Ave.	33304	SunTrust Bank	501 E. Las Olas Blvd., 2nd Floor	33301		
Dan Lindblade	Consensus	12/31/2011	2604 NE 29th St.	33306	Greater Fort Lauderdale Chamber of Commerce			H: 954-422-2171 B: 954-462-6000	<a href="mailto:dan@ftchamber.com">dan@ftchamber.com</a>

**Liaison** - Shannon Vezina - Public Information Department 954-828-4743

**City of Fort Lauderdale  
GENERAL CONDITIONS**

These instructions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Department. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB) and Request for Proposal (RFP) are interchangeable.

**PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:**

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 30 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.04 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.05 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of ninety (90) days from the date of bid opening unless otherwise stated in the ITB.
- 1.06 VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.

By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared, by the City as conditional.

- 1.07 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.08 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

BLACK, which includes persons having origins in any of the Black racial groups of Africa.

WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

## 1.09 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

## Part II DEFINITIONS/ORDER OF PRECEDENCE:

- 2.01 BIDDING DEFINITIONS** The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:  
INVITATION TO BID (ITB) when the City is requesting bids from qualified Bidders.  
REQUEST FOR PROPOSALS (RFP) when the City is requesting proposals from qualified Proposers.  
BID – a price and terms quote received in response to an ITB.  
PROPOSAL – a proposal received in response to an RFP.  
BIDDER – Person or firm submitting a Bid.  
PROPOSER – Person or firm submitting a Proposal.  
RESPONSIVE BIDDER – A person whose bid conforms in all material respects to the terms and conditions included in the ITB.  
RESPONSIBLE BIDDER – A person who has the capability in all respects to perform in full the contract requirements, as stated in the ITB, and the integrity and reliability that will assure good faith performance.  
FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.  
SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.  
CONTRACTOR – Successful Bidder or Proposer who is awarded a Purchase Order, award Contract, Blanket Purchase Order agreement, or Term Contract to provide goods or services to the City.  
CONTRACT – A deliberate verbal or written agreement between two or more competent parties to perform or not to perform a certain act or acts, including all types of agreements, regardless of what they may be called, for the procurement or disposal of equipment, materials, supplies, services or construction.  
CONSULTANT – Successful Bidder or Proposer who is awarded a contract to provide professional services to the City.  
The following terms may be used interchangeably by the City: ITB and/or RFP; Bid or Proposal; Bidder, Proposer, or Seller; Contractor or Consultant; Contract, Award, Agreement or Purchase Order.
- 2.02 SPECIAL CONDITIONS:** Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

## PART III BIDDING AND AWARD PROCEDURES:

- 3.01 SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidder's should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.
- 3.02 MODEL NUMBER CORRECTIONS:** If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.
- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.

- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Department immediately. Such notification must be received by the Procurement Services Department prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond, postal money order, cashiers check, or irrevocable letter of credit. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond or irrevocable letter of credit, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS:** Florida law provides that municipal records shall at all times be open for personal inspection by any person. Section 119.01, F.S., the Public Records Law. Information and materials received by City in connection with an ITB response shall be deemed to be public records subject to public inspection upon award, recommendation for award, or 10 days after bid opening, whichever occurs first. However, certain exemptions to the public records law are statutorily provided for in Section 119.07, F.S. If the Proposer believes any of the information contained in his or her response is exempt from the Public Records Law, then the Proposer, must in his or her response, specifically identify the material which is deemed to be exempt and cite the legal authority for the exemption. The City's determination of whether an exemption applies shall be final, and the Proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as public records.
- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.

If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.

- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may

arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.

#### **PART IV BONDS AND INSURANCE**

**4.01 PERFORMANCE BOND/IRREVOCABLE LETTER OF CREDIT:** If a performance bond or irrevocable letter of credit is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond or an Unconditional Irrevocable Letter of Credit payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent. If a Letter of Credit is chosen, it must be in a form acceptable to the City, drawn on a local (Broward, Dade or Palm Beach Counties) bank acceptable to the City and issued in favor of the City of Fort Lauderdale, Florida. If a Bidder wishes to use a non-local bank, he must have prior City approval of the requirements to draw against the Letter of Credit.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond or Irrevocable Letter of Credit is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

**4.02 INSURANCE:** If the Contractor is required to go on to City property to perform work or services as a result of ITB award, the Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Department original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an ADDITIONAL INSURED and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

#### **PART V PURCHASE ORDER AND CONTRACT TERMS:**

**5.01 COMPLIANCE TO SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance to bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:

- Bidders name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
- All City Departments being advised to refrain from doing business with the Bidder.
- All other remedies in law or equity.

**5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.

**5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended, and be in compliance with Chapter 442, Florida Statutes. Any toxic substance listed in Section 38F-41.03 of the Florida Administrative Code delivered as a result of this order must be accompanied by a completed Material Safety Data Sheet (MSDS).

**5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.

**5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.

**5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.

**5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.

**5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** The Contractor agrees to protect, defend, indemnify, and hold harmless the City of Fort Lauderdale and its officers, employees and agents from and against any and all losses, penalties, damages, settlements, claims, costs, charges for other expenses, or liabilities of every and any kind including attorneys fees, in connection with or arising directly or indirectly out of the work agreed to or performed by Contractor under the terms of any agreement that may arise due to the bidding process. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable Statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.

- 5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in its best interest as determined by the City, to cancel contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The form of all records and reports shall be subject to the approval of the City's Internal Auditor. The Contractor agrees to make available to the City's Internal Auditor, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports and records relating to this contract for the duration of the contract and retain them for a minimum period of three (3) years beyond the last day of the contract term.
- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at their own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- 5.15 NON-DISCRIMINATION:** There shall be no discrimination as to race, sex, color, creed, age or national origin in the operations conducted under this contract.
- 5.16 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:
1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
  2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
  3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve themselves of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying him for receiving any business from the City for a stated period of time.
- If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.
- 5.17 ELIGIBILITY:** If applicable, the Contractor must first register with the Department of State of the State of Florida, in accordance with Florida State Statutes, prior to entering into a contract with the City.
- 5.18 PATENTS AND ROYALTIES:** The Contractor, without exception, shall indemnify and save harmless the City and its employees from liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including its use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.19 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.20 LITIGATION VENUE:** The parties waive the privilege of venue and agree that all litigation between them in the state courts shall take place in Broward County, Florida and that all litigation between them in the federal courts shall take place in the Southern District in and for the State of Florida.

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#### Question 1

All attached documents are empty. Is there timeline to upload the documents? (Submitted: Sep 9, 2010 4:05:01 PM EDT)

#### Answer

- If you have trouble viewing the attached documents, contact Bidsync support at 800-990-9339. (Answered: Sep 10, 2010 7:02:46 AM EDT)

#### Question 2

The RFP states that attendance at the pre-proposal conference is strongly encouraged, and that submission of a proposal is an affirmation that the proposer has familiarized himself or herself with the nature and extent of required work. With that understood and acknowledged, is attendance at the pre-proposal conference mandatory? Will a proposer who does not attend this conference be downgraded in the evaluation of his or her proposal? (Submitted: Sep 10, 2010 4:00:14 PM EDT)

#### Answer

- Attendance is NOT mandatory. (Answered: Sep 13, 2010 7:02:22 AM EDT)

#### Question 3

Would the City accept a consultant with professional liability (E&O) insurance of \$500,000 per occurrence, instead of the \$1 million specified in the RFP? Our E&O insurer specializes in providing coverage to planners and landscape architects. \$500,000 is the maximum E&O coverage offered, in light of the fact that studies performed by these professionals do not typically offer opportunities for harm to public health or safety. This is particularly true of a visioning Study. (Submitted: Sep 10, 2010 4:15:16 PM EDT)

#### Answer

- Risk Management is okay with reducing the minimum limits to \$500,000 for this contract type. (Answered: Sep 13, 2010 1:22:45 PM EDT)

#### Question 4

The RFP stated that the budget has not been allocated as yet for this project. When will the budget be made public and will there be a dollar figure allocated for this visioning work? Also in terms of marketing and PR support - will the City allow access to their website for notices of meetings and sharing of information with the general public? What is the length of the project from start to finish? (Submitted: Sep 11, 2010 11:24:38 AM EDT)

#### Answer

- Currently there is not a proposed budget or funding level for this project. The RFP evaluation Committee will review the RFP responses and make a recommendation to the City Manager, who will then make a recommendation to the City Commission. The City Commission will discuss the recommendation at a public meeting and determine the next steps, including a budget, for the project.

Yes, the City will allow access to the City website for notices of meetings and sharing of information.

The length of the project is not established. There is not a project deadline, although the City would like to aim to begin as soon as possible and complete the project in 2011. (Answered: Sep 13, 2010 1:21:11 PM EDT)

#### Question 5

Is it possible to listen to the conference by telephone? I am not sure if we will have anyone available tomorrow in Ft. Lauderdale to attend in person although I am also exploring that possibility. (Submitted: Sep 22, 2010 1:10:01 PM EDT)

#### Answer

- Yes, the information for the Pre-bid Conference Bridge Telephone Call is Date: 9/23/10, Start Time: 9:30 - 10:00 am, Duration: 3 hours, Conference Bridge Telephone Number: 954-828-7451, Meeting ID: 1114 (Answered: Sep 22, 2010 1:14:50 PM EDT)

#### Question 6

Can a copy of the pre-proposal meeting sign-in sheet be posted to the RFP? (Submitted: Sep 23, 2010 11:26:58 AM EDT)

#### Answer

- Yes, has been posted. (Answered: Sep 23, 2010 11:27:10 AM EDT)

#### Question 7

According to the bid documents there have been 2 other visioning initiatives for The City of Fort Lauderdale- please identify the companies who had those contracts. (Submitted: Sep 25, 2010 3:35:20 PM EDT)

#### Answer

- The 1995 New Century - New City Assembly process was coordinated by the Florida Institute of Government at Florida Atlantic University and the Florida Atlantic University/Florida International University Joint Center for Environmental and Urban Problems.

We have researched the 1984 Mission/Visioning process, and have been unable to locate any contracts for individual consultants who may have worked on the initiative. However, as stated above, the attached documents should provide an overview of the process and its outcomes.

The following documents have been added to the RFP for background purposes:

A) 1984 Mission Statement

"Best City of its Size by 1994" and list of General Obligation Bond projects

B) Outcomes of 1984 Mission Statement

Projects and initiatives accomplished by the City as a result of the 1984 Mission/Visioning process

C) 1995 Vision Statement and American Assembly Process

The Vision Statement adopted by the City in 1995 and the New Century - New City Assembly Policy Statement (Answered: Sep 28, 2010 7:48:36 AM EDT)

#### Question 8

At the pre-proposal it was stated there are no set asides for minority business - which is surprising. In support of our local businesses, are the prime consultants encouraged in any way to use LOCAL and/or small business partners in the Fort Lauderdale/Broward County community? (Submitted: Sep 26, 2010 6:04:39 PM EDT)

#### Answer

- Encouraged, but not required. (Answered: Sep 27, 2010 7:15:58 AM EDT)

#### Question 9

Regarding the 'existing conditions report' intended to serve as benchmarking information:

-Can you provide more detail on the requirements for the 'existing conditions report'? From the description in the 'Expectations' section, it appears to be largely descriptive (inventories/documentation of existing resources), but the 'Project Deliverables' section indicates a requirement to benchmark against comparable cities, presumably indicating the report should add value to the vision by showing where Fort Lauderdale fits in on a national scale in terms of key indicators. Can the committee provide more detail about the intended use of the conditions report and the appropriate scale for study? An exhaustive study would require a large scope for field work/research/statistical analysis, so any indication of the breadth/level of detail in the report would be helpful.

-Is the 'conditions report' prepared in 1995 available online (or can the visioning committee make it available) to provide a sense of scale for updating purposes? (Submitted: Sep 27, 2010 4:54:00 PM EDT)

#### Answer

- The purpose of the "existing conditions report" is twofold: (1) to detail current conditions in the City and (2) to serve as a benchmarking instrument to see where the City ranks against comparable markets/cities.

The report is a key part of the visioning process because it will provide a snapshot of where the City currently ranks versus other comparable communities; show what conditions currently exist in the City; and serve as a reference point to help determine what changes may be needed to achieve the goals encompassed in the Vision Statement and outlined in the Vision Action Plan.

The existing conditions report and benchmarking information should reflect data and key indicators related to the core drivers listed under #1 and the conditions listed under #3 in the "Expectations" section of the RFP.

The document titled "1995 Vision Statement and American Assembly Process" is attached for reference. This document includes the Vision Statement adopted by the City in 1995 and the New Century - New City Assembly Policy Statement (Answered: Sep 29, 2010 3:31:43 PM EDT)

#### Question 10

Please provide guidance as to what aspects of the Florida Government in the Sunshine Law will govern the contractor's interactions with the public. Specifically, can online social media be used (1) to attract interest in the visioning process or (2) to receive input from members of the public? Also, in the case of in-person public comment sessions, will the contractor need to produce detailed minutes of each session or is a summary of comments within the contractor's report sufficient? What support can the city provide to comply with such requirements? (Submitted: Sep 27, 2010 7:31:20 PM EDT)

#### Answer

- The City Attorney's Office advises that if a social media outlet is created there will have to be strict guidelines with regard to the how the information is received by committee members. Committee members should not be permitted to post comments themselves.

With regard to the Sunshine Law and public comment sessions, it is the opinion of the City Attorney's Office that if the consultant is functioning in the role of a fact finder, recorded minutes of the public comment sessions would not be required. However, the consultant would still be responsible for providing the committee with all of the information collected.

A Sunshine Law violation would occur if the consultant functions outside of the role as a fact-finder and is delegated some of the Visioning Committee's authority or is used as a liaison between committee members. Having this type of authority would mean that the consultant would independently make decisions absent the input of the committee. If, for example, the consultant filters or eliminates information to be presented to the committee in such a manner that the committee is only ratifying the consultant's action, then this could be construed as a delegation.

The case law example that applies here would be if a hiring committee, subject to the Sunshine Law, creates a subcommittee to interview candidates. If the subcommittee interviews 10 candidates and only provides 5 names to the committee for consideration, then the decision to eliminate the other 5 would be considered a Sunshine Law violation. Similarly, if the visioning consultant reviews 50 comments and only provides the committee with 10 of those comments in the summary, that may be analogous. (Answered: Sep 29, 2010 2:15:33 PM EDT)

#### Question 11

Provide an outline detailing your approach and concept to the project, and provide a proposed Scope of Services to demonstrate an understanding of the project. Describe how the consultant team will complete the scope of work including a detailed 6-month schedule. The schedule should include periodic reports of progress to the Committee. The visioning process must include a variety of interactive public involvement activities. Those submitting proposals are encouraged to suggest revisions to the Scope of Work described in this RFP accompanied by brief explanations of how they would improve the project. (Submitted: Sep 28, 2010 2:23:50 PM EDT)

#### Answer

- Clarification:

The consultant is being asked to prepare a detailed six-month schedule that will fulfill the requirements outlined in the RFP under "Scope of

Work" (Part IV – 07). As stated above, (Proposal Pages Part II – Technical Proposal -- Tab 3: Preliminary Scope of Services) "Those submitting proposals are encouraged to suggest revisions to the Scope of Work described in this RFP accompanied by brief explanations of how they would improve the project. (Answered: Sep 28, 2010 2:24:27 PM EDT)

**Question 12**

How can a list of the Visioning Committee members be obtained and a list of who has viewed the RFP? (Submitted: Sep 28, 2010 2:25:12 PM EDT)

**Answer**

- Both documents have been attached. (Answered: Sep 28, 2010 2:25:27 PM EDT)

**Question Deadline: Sep 28, 2010 3:00:00 PM EDT**