



# CITY OF FORT LAUDERDALE CONSULTING SERVICES FOR VISIONING PROJECT

REQUEST FOR PROPOSAL  
OCTOBER 20, 2010





October 20, 2010

Mr. Richard Ewell  
Purchasing Services  
City of Fort Lauderdale  
Procurement Services Department  
100 N. Andrews Avenue, #619  
Fort Lauderdale, Florida 33301

Dear Mr. Ewell and the City of Fort Lauderdale Visioning Committee:

HOK Advance Strategies is pleased to submit our proposal for the *City of Fort Lauderdale Vision for the Next Century Project*. We understand the impact this plan has on the City's future - charting directions for years to come in order to serve its residents, businesses, institutions and visitors. On behalf of the HOK Team, I am proud to offer to you an extraordinary team of strategic planners, researchers, communications and marketing experts, urban planners, and condition assessment engineers to help the City of Fort Lauderdale achieve its planning goals. Our team holds specialized skill sets required to plan, coordinate and implement necessary actions to develop and deliver a best of class *Vision for the Next Century Project*.

HOK Advance Strategies will be the single source of responsibility for the team and will manage all services to ensure project objectives are successfully achieved. HOK's philosophy is to Create, Inspire, Connect and Care. HOK Advance Strategies provides leadership to many City and County governments, multiple Federal Government Agencies through the GSA, as well as many global corporations and communities with complex and quantifiable challenges similar to those faced by the City of Fort Lauderdale- an ever shifting economy, growth, development, and transportation issues with diverse business and residential populations, all with a decreasing tax base. Our clients trust us in helping them define and direct their visions - and we look forward to assisting the City of Fort Lauderdale in defining their own vision.

Our team is partnering with professionals who live and work in the Fort Lauderdale community. Utilizing the knowledge and global experience of HOK and Faithful+Gould, and the direction from the City's Visioning Committee, we plan to implement a grassroots visioning process that includes a blend of effective approaches to engage citizens, communities, and organizations in creating a realistic and actionable Vision for the Next Century for Fort Lauderdale. Unique to our team is the credentials of our local team members, including Christine Madden, President of Mad 4 Marketing, and our communications partner. As the incoming Chair of the Greater Fort Lauderdale Chamber of Commerce, she will pave the way for the Chamber and act as a catalyst in the business community on the City's Visioning Team's behalf.

Please do not hesitate to reach out if there are any questions my team can answer, or if you require additional information. Speaking for the entire HOK Advance Strategies Team and as the Team's Principal in Charge, I look forward to the opportunity to work with you.

Sincerely,

Julian Tablada, AIA, LEED® AP  
Vice President



## CITY OF FORT LAUDERDALE VISION FOR THE NEXT CENTURY



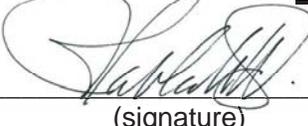
PROPOSAL SIGNATURE PAGE	PAGE 3
STATEMENT OF QUALIFICATIONS	PAGE 4
PRELIMINARY SCOPE OF SERVICES	PAGE 9
YEARS OF EXPERIENCE	PAGE 21
ORGANIZATIONAL CHART AND RESUMES	PAGE 28
LIST OF CLIENTS	PAGE 37
COST OF SERVICES	PAGE 40
ADDENDA AND ADDITIONAL INFORMATION	PAGE 43
▪ ADDENDUM NO. 4	
▪ INSURANCE FORMS	
▪ VARIANCES TO CONTACT	
▪ FIRM PROFILES	

**BID/PROPOSAL SIGNATURE PAGE**

**How to submit bids/proposals:** It is preferred that bids/proposals be submitted electronically at [www.bidsync.com](http://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:  October 20, 2010  
(signature) (date)

Name (printed) Julian Tablada Title: Vice President

Company: (Legal Registration) Hellmuth, Obata + Kassabaum, 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: 180 NE 39th Street

City Miami State: FL Zip 33137

Telephone No. 786.497.4810 FAX No. 786.497.4811 Email: julian.tablada@hok.com

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

Payment Terms (section 1.03): Answer below Total Bid Discount (section 1.04): N/A

HOK will invoice monthly based on percentage of completion and payment is due 30 days from receipt of invoices.

Does your firm qualify for MBE or WBE status (section 1.08): MBE N/A WBE N/A

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

<u>Addendum No.</u>	<u>Date Issued</u>
No. 4	September 28, 2010

**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: Attached in the Addendum is a copy of the Terms and Conditions with HOK's variances and exceptions.



## 2. STATEMENT OF QUALIFICATIONS

### PROJECT UNDERSTANDING

The HOK Team has reviewed the RFP and all materials provided by the City in Addenda and reference material. We understand the City's aspirations and expectations, the uniqueness of the diverse community and the challenges facing Fort Lauderdale's city government. Our team is comprised of exactly the right know how, experience and temperament to help the City craft the vision for its future. We reference the entire RFP and Addenda as part of our understanding of the project statement. There are a few key points contained in the Technical Specifications of Services we want to highlight because these are issues that the HOK team is keenly aware of and uniquely qualified to help the City address:

#### ▪ GENERAL INTENT

*To launch a collaborative citywide 25 year vision for the future of this progressive urban city. Commission members appointed 2 persons each, plus 1 consensus appointee, to serve as a Visioning Committee (Committee) to spearhead this community initiative. The 11-member Committee represents diverse experience in strategic planning, banking, real estate, development, human resources, public safety, business, smart growth and government. The Committee's stated purpose is:*

*'Develop and recommend to the 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; 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.'*

#### ▪ CITY DEMOGRAPHICS

*The City of Fort Lauderdale is the County seat of Broward County, Florida. The County population is 1.8 million people representing a 300+% growth from 1980. The City itself is built-out with a stable population count of approximately 180,000 citizens. However, due to business and tourism swells our daytime population is approximately 500,000 in season (winter) and 300,000 off-season (summer).*

The HOK Team has experience in reaching and engaging multicultural audiences. We work in countries all over the world and are finding that many are experiencing some or most of the same demographic shifts. Additionally, our team member, Mad 4 Marketing is uniquely qualified to help reach these culturally diverse and age-diverse populations. We have a proven track record of reaching our city's population and utilizing strategies to connect with niche audiences. Our team is sensitive to the multi-cultural, multi-generational, multi-social/economic stakeholders. Our programs, methods and tools will be customized appropriately to encourage and enable open dialogue. Methodologies will include:



## 2. STATEMENT OF QUALIFICATIONS

(CONTINUED)

- » A comprehensive communications plan to reach niche audiences
- » A mix of traditional and nontraditional venues to maximize participation in the process.
- » The use of Spanish and Creole language interpreters, if needed for certain niche communities.
- » Innovative communication tools to ensure privacy and security of comments for certain populations and citizens.

### ■ QUANTIFIABLE CHALLENGES

*The City of Fort Lauderdale, much like most U.S. diverse cosmopolitan centers, is facing a critical period. These are some of the challenges that were identified in the Technical Specifications:*

- » *Many residents and local businesses are struggling in this depressed economy.*
- » *Issues of growth and development and transportation are contentious.*
- » *Various strategies for economic development have been proposed but not agreed upon.*
- » *Preservation of green space and how to fund it is in question.*
- » *The City's decreasing property tax base is creating a struggle between City services and community affordability.*
- » *Diversity of businesses and population, which has been the hallmark of this community, is strained.*
- » *A new Commission desires to find a way to move forward in a way that will respect its citizens and their values.*

These challenges are not uncommon as noted in the RFP. HOK has developed a methodology that expands the "triple bottom line" approach for measuring success. Our program has been trademarked as "Fully Integrated Thinking -FIT" and approaches urban planning from a holistic Systems thinking methodology to identify, measure and develop concepts and solutions. It uses sustainable natural organic systems as a model to create solutions that will evolve into balanced human systems. Although, the scope of this proposal does not include providing urban design/master planning we believe that our commitment to sustainable growth and the development and application of solutions that will enable responsible, homonious development is a core value that this project will benefit from. HOK is able to provide the City with a FIT level service as a separate or additional service and it is called out as part of the Comprehensive Service Level response in the Scope of Work.

### ■ PAST VISIONING INITIATIVES

The previous Visioning Initiatives in 1985 and 1995 will be used as foundational information in developing and performing the Scope of Services outlined for this project.



## 2. STATEMENT OF QUALIFICATIONS

(CONTINUED)

### ▪ CURRENT VISIONING INITIATIVE

*In keeping with the stated mission, the Committee has recommended to The City of Fort Lauderdale Commission that a Request for Proposals be issued for a professional consultant (Contractor) to recommend a process and lead a community-wide public dialogue and visioning effort to collect data for Vision Statement(s) and related Vision Action Plan(s) for Committee review. The professional Consultant(s) will work with the Committee, business, civic organizations, religious institutions, non-profit entities, governments, educational groups, community members of all ages, elected officials, City of Fort Lauderdale management/staff, homeowner associations, community and selected regional organizations ("Community") to collect city-wide observations, opinions, wishes, dreams and recommendations detailing:*

- » *what is good/right/don't change*
- » *concerns*
- » *visions*
- » *actions needed to achieve visions*

The HOK Problem Seeking Methodology focuses on identifying and solving these very issues. Our collaboration style is on point to help the City engage its stakeholders across all social/cultural/economic/generational/ethnic/educational backgrounds.

### ▪ EXPECTATIONS

#### 1. *The Visioning Process:*

*A Visioning process which will address the core drivers presented below (in alphabetical order) and highlight state-of-the-art practices around the world which have the greatest impact on the City of Fort Lauderdale's stakeholders, the City's future growth and development, and which will result in specific visions and action plans.*

- » *Community Identity/Image/Attitude;*
- » *Economic Development;*
- » *Education;*
- » *Government;*
- » *Infrastructure/Transportation (Inclusive of funding methods to support same);*
- » *Marine Interests and Industries;*
- » *Public Safety;*
- » *Quality of Life/Neighborhoods/Parks/Recreation;*
- » *Tourism Interests and Industries.*

#### 2. *Community Dialogue:*

*A Visioning process that creates the opportunity for Community dialogue between people with different perspectives and one that will provide a model for continuing conversations in the future.*



## 2. STATEMENT OF QUALIFICATIONS

(CONTINUED)

### 3. Existing Conditions Report:

*An 'existing conditions report' which will serve as benchmarking information. This report should detail all current conditions in the City inclusive of an inventory of City facilities, waterways, beaches, neighborhoods, economic activities, educational resources, city governmental structures, regional/related governmental structures, available demographic information or important collectible facts concerning the City which may relate to a future City Vision.*

*Note: A 'Conditions Report' was prepared in 1995 (for the American Assembly process) and this could serve as a base point for updating purposes. It would be important to collect fact-based information regarding ecological, economic, and social concerns as well that may serve as a "reality check" for all participants and expand their sense of possibilities.*

In the Pre-Bid conference it was noted that the expectations of this study should range between \$100,000 to \$250,000 dollars. We believe this range of fee expectation does not provide adequate funding to conduct the Community outreach required to engage the City's stakeholders and conduct an adequate conditions assessment for all City properties and infrastructure, economic, social and ecological data. We have identified a Conditions Assessment as part of the Comprehensive Service Level, but to arrive at a detailed scope and fee, we will need to meet with the Visioning Team to confirm the level detail and breadth of the study.

#### ▪ SCOPE OF WORK

##### 1. Grass roots visioning activity:

*Implement a true grass roots visioning activity including extensive and sustained public involvement activities, including outreach efforts with the goal of engaging 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.*

##### 2. Face to Face Dialogue

*Encouraging face-to-face dialogue among stakeholders utilizing a blend of approaches that might include, but not be limited to: outreach to City advisory boards, review of studies currently being done by the City, workshops, citizen polling, personal interviews, focus groups, study circles, engagement in community events, media coverage, citizens congress, and the use of various electronic technologies to reach those who might not, or cannot otherwise participate.*

##### 3. Face to Face Dialogue

*Produce a "Vision Statement" distilled from the input of the many participants and reviewed by them.*



## 2. STATEMENT OF QUALIFICATIONS

(CONTINUED)

4. *Vision Action Plan*

*Develop a Vision Action Plan that will guide and inform governmental officials. This Vision Action Plan will not be a list of mandates; rather, it will be a list of goals, which contain strategies, including funding strategies, that would provide guidance for implementing the elements of the vision statement.*

5. *Vision Action Plan*

*Recommend a process for the Commission to revisit the Vision Action Plan on a scheduled basis.*

The HOK team will guide the City through all these phases and produce a realistic, actionable and visionary Vision for the Next Century for the City of Fort Lauderdale.

We are pleased to outline our recommended scope of services.



## 3. PRELIMINARY SCOPE OF SERVICES

### THE FORT LAUDERDALE VISION INTO THE NEXT CENTURY PROJECT

HOK Advance Strategies has assembled a stellar cast of local and global partners for the development of **The Vision for the Next Century for the City of Fort Lauderdale**. Our partners from the Fort Lauderdale area bring their expertise in community data gathering design, execution, data analysis and strategic community communications and engagement. Both local firms, **The Tara Group** and **Mad 4 Marketing** have a deep understanding of the Fort Lauderdale community, cultures and issues, as does our HOK Miami/Tampa offices. Faithful+Gould is an international firm that specializes in condition assessments, estimating and sustainability.

The Committee is probably more familiar with HOK's award winning planning and design in Florida, including the Hollywood/Fort Lauderdale International Airport and other public buildings, universities, and cultural facilities. For this project HOK is featuring our HOK Advance Strategies practice with early origins in urban planning and core competencies for Visioning and Community Problem Seeking.

HOK Advance Strategies experience includes leading multi-disciplinary teams in the visioning, planning and design of cities around the world. We utilize our trademarked FIT methodology which is an exciting and new concept that expands on the accepted measure of societal success known as the triple bottom line: social, economic and environmental (Attachment). Although there may be budgetary limitations for utilizing the full methodology for the City of Fort Lauderdale, it is a fundamental influence in the way our team views, analyzes and draws conclusions for all projects. Additionally, we use the Problem Seeking® method to conduct vision sessions, user interviews, and client review and approval meetings. Our extensive experience in programming and data analysis enables effective use of a wide range of tools, such as web-based questionnaires and databases, so that clients can enjoy the benefits of faster delivery at lower cost.

Our team's approach for creating the **The Vision for the Next Century for the City of Fort Lauderdale** is an interactive and systematic approach that involves defining the problem, identifying facts, analyzing and synthesizing the facts, creating concepts that achieve the goals, and ultimately crafting the Vision. We understand the need for effective communication to the community, for inclusivity in the creative process, and the importance of interactive processes to engage the community, especially underrepresented populations, as a means of gaining their trust and support for solutions.

The following section identifies the process we propose for achieving the Committee's aspirations. We have developed the delivery process shown in the diagram below to help the Committee create and articulate the Vision for the Next Century for Fort Lauderdale.



### 3. PRELIMINARY SCOPE OF SERVICES

City of Fort Lauderdale Visioning  
Approach and Project Plan

Project Phases	Program Management & Communications				
	1 SmartStart	2 Project Development	3 Community Engagement & Data Gathering	4 Visioning Workshops	5 Final City Vision Report
<b>Project tasks and actions</b>	<ul style="list-style-type: none"> <li>Project Kick-off</li> <li>Project Visioning &amp; Goal Setting</li> <li>Project Protocols</li> <li>Budget &amp; Scope Alignment</li> <li>Confirm project schedule</li> <li>City operating authorizations</li> </ul>	<ul style="list-style-type: none"> <li>Refine project methodology</li> <li>Research existing information</li> <li>Conditions assessment</li> <li>Develop project specific tools &amp; content</li> <li>Develop communications &amp; engagement plan</li> </ul>	<ul style="list-style-type: none"> <li>Implement methodology</li> <li>Implement communications &amp; engagement plan</li> <li>Community engagement</li> <li>Virtual community canvassing</li> <li>Benchmark comparison</li> <li>Data gathering</li> </ul>	<ul style="list-style-type: none"> <li>Team analysis &amp; synthesis</li> <li>Interactive Visioning Workshop with Visioning Steering Committee</li> <li>Craft Vision</li> </ul>	<ul style="list-style-type: none"> <li>Present 1<sup>st</sup> Draft of Vision</li> <li>Town Hall Draft Vision presentations &amp; comments</li> <li>Edits</li> <li>City Vision Final Draft</li> </ul>
<b>Communications &amp; approvals</b>	<ul style="list-style-type: none"> <li>Project Startup</li> <li>Visioning Steering Committee</li> <li>City Authorization &amp; sanctioning</li> </ul>	<ul style="list-style-type: none"> <li>Methods &amp; tools</li> <li>Visioning Steering Committee</li> </ul>	<ul style="list-style-type: none"> <li>Data storage</li> <li>Visioning Steering Committee</li> <li>City Residents</li> </ul>	<ul style="list-style-type: none"> <li>Interactive workshop summary</li> <li>Data analysis</li> <li>Visioning Steering Committee</li> </ul>	<ul style="list-style-type: none"> <li>Final report</li> <li>Visioning Steering Committee</li> <li>City Council</li> <li>City residents</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>Project Vision &amp; Goals</li> <li>Guiding Principles</li> <li>Prioritized Goals</li> <li>Communication Protocols</li> <li>Aligned Scope, Schedule &amp; Budget</li> <li>Go forward plan</li> <li>Roles and responsibilities matrix</li> </ul>	<ul style="list-style-type: none"> <li>Project Methodology</li> <li>Project tools &amp; messaging content</li> <li>Summary conditions assessment</li> <li>Key findings drivers &amp; needs</li> <li>Marketing &amp; communication plan go forward action plan</li> </ul>	<ul style="list-style-type: none"> <li>Key findings from Town Halls, Forums, on-line communities, web-based surveys</li> <li>Applicable best of class summaries from benchmarking</li> <li>Community input collected and stored</li> </ul>	<ul style="list-style-type: none"> <li>Summary of analysis &amp; synthesis</li> <li>City Vision Draft</li> <li>Preliminary Vision Action Plan</li> </ul>	<ul style="list-style-type: none"> <li>Town Hall comments &amp; reactions</li> <li>Edited City Vision</li> <li>Final City Vision</li> <li>Prioritized Go forward Vision Action Plan &amp; recommendations</li> </ul>
<b>Benefits</b>	<p><b>Clear project mission:</b></p> <ul style="list-style-type: none"> <li>Clear priorities</li> <li>Increased efficiency</li> <li>Increased effectiveness</li> </ul>	<p><b>Clear definition:</b></p> <ul style="list-style-type: none"> <li>Defined methodology, tools and content</li> <li>Go forward action plan</li> <li>Property &amp; facilities list with performance rating</li> </ul>	<p><b>Defined and reported:</b></p> <ul style="list-style-type: none"> <li>Community input summaries</li> <li>Potential best of class solutions to help City position Vision</li> </ul>	<p><b>Draft City Vision:</b></p> <ul style="list-style-type: none"> <li>Best of class + resident input to Vision Draft</li> <li>Leverages global benchmarking</li> <li>City Leadership understanding</li> </ul>	<p><b>Final City Vision:</b></p> <ul style="list-style-type: none"> <li>Community involvement</li> <li>Community understanding</li> <li>City Leadership understanding</li> <li>City and community support</li> </ul>
<b>Result</b>	<b>A Vision for the city that is reflective of the community's aspirations and leverages global best of class ideas</b>				



## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

### CLARIFICATION OF DIAGRAM ORGANIZATION

#### Project Phases

Phases are listed across the top of the diagram and are intended to proceed in sequence over time. Program Management and Communications is on an on-going effort that is active at all the phases and shows that our team will be engaged with the City Visioning Committee throughout the process. Though listed as separate and distinct areas, each phase is an integral part of the overall approach, building on the information collected in the previous phase and informing those phases still to come.

#### Project tasks and actions

The project tasks and actions stream in the diagram summarizes the key activities performed during each phase. The tasks will vary depending on the service level. Refer to the narrative descriptions for clarification on what each level will provide per phase.

#### Communications and approvals

The communications and approvals stream in the diagram identifies the type of communication employed by phase and the primary person(s), group and/or stakeholders that are engaged during each phase of the project. It also indicates who will be reviewing and approving the work completed during each phase. Specific touch points with other City entities and stakeholders are identified.

#### Deliverables

The Deliverables stream in the diagram identifies the product of the work in each phase. This is the list of Deliverables by phase. The deliverables will vary depending on the service level. Refer to the narrative descriptions for clarification on what each level will provide per phase.

#### Benefits

The Benefits stream in the diagram shows the expected key benefit that the activities in each phase bring to the City and the team. Some of these benefits are internally focused and show the benefit activities deliver to the team to enable us to proceed in an efficient manner as well as the ultimate benefit the activities deliver to the City in our collective quest to meet the project goals.

#### Result

The last stream in the diagram summarizes the expected result to be derived from undertaking and completing the scope of work through our approach and using our methodology. The level of community input will vary depending on the service level selected.



## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)



### PHASE 1

#### SMARTSTART (APPROXIMATELY 4 WEEKS)

The process begins with the SmartStart phase. SmartStart is a trademarked process that HOK has developed and conducts at the beginning of all of our projects. It insures that our projects start and stay on mission and deliver the highest value to our clients.

Before we engage in our interactive workshops, we will request information from the City to help us prepare the SmartStart workshops to be highly effective.



The SmartStart Phase is comprised of a series of interactive workshops with the City's project leaders and stakeholders and the HOK team. Through these workshops we will identify and confirm the City's current vision for fulfilling its Mission and Charter. We will identify and confirm the priorities and guiding principles that will provide the framework for carrying out the project.

The HOK Team and the City's Visioning Committee will establish project protocols. We will also identify with the City the necessary clearances and authorizations the HOK team will need to be able to operate effectively on the project.

By the end of the SmartStart Phase the HOK team and the City will achieve and confirm alignment, build consensus and establish a clear direction for what the City is trying to achieve with the Vision for the Next Century Project. The administrative and political authorizations needed to permit the team to move forward will also be put in place.

#### Outcomes

- Aligned Project Strategic Vision
- Guiding Principles
- Prioritized Goals
- Communication Protocols
- Aligned Scope, Schedule and Budget
- Go forward plan
- Team commissioned and authorized by the City
- Project Charter to memorialize the SmartStart Phase

#### Value and Benefits

The SmartStart phase will provide clarity to the project mission by confirming the drivers and guidelines that are to be followed in developing the Facility Master Plan. This phase is critical in order to bring the entire team and the City Visioning Team together to establish clear operating and communication protocols that will allow the efficient and effective conduct of the project. Having clarity in the City's expectations, vision, goals and priorities will ensure that all parties participating in the project align on the best future direction goals for the City.



## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

### Service Level Clarifications:

#### *Basic Level*

1. All SmartStart tasks are included and conducted with the City of Fort Lauderdale Visioning Committee.

#### *Moderate Level*

1. All SmartStart tasks are included and conducted with the City of Fort Lauderdale Visioning Committee.

#### *Comprehensive Level*

1. All SmartStart tasks are included and conducted with the City of Fort Lauderdale Visioning Committee.

### PHASE 2

#### PROJECT DEVELOPMENT (APPROXIMATELY 5 WEEKS)

The Project Development Phase will focus on tailoring the project steps based on the knowledge gained in the SmartStart Phase. The HOK team will refine the project methodology to align with the new information and goals identified during the SmartStart sessions. This will ensure that our methodology is specific to the City of Fort Lauderdale, the goals and the specific issue present.

The HOK team will review the current information that the City will make available to us in preparing the methodology for the project. The City will provide the HOK Team with past reports, property information, departmental master plans to allow us to become familiar with how the City is providing services to the community. We will conduct a conditions assessment to determine the resources the City has to meet its Mission Statement. The level of detail of the Condition Assessment will be dependent on the Level of Service the City elects to approve. Regardless of the level chosen, the HOK Team will rely on the ability of the City to provide information in an accurate and timely manner. If the City lacks adequate accurate information, the HOK Team can provide a proposal add service or separate scope of services to implement a properties/facilities survey and documentation service.

The HOK Team will develop and refine the tools that will be used to engage with the community in the next phase, Community Engagement & Data Gathering. We will tailor our physical and virtual tools to the conditions and specific challenges we will face in Fort Lauderdale. We will tailor our tools and methods and craft the content for meetings, town halls, forums, e-communities, surveys, and questions to be geographically, culture, social-economic, and life style sensitive. We expect that there are different priorities by communities within the City and the tools and marketing plan that we will develop and refine will be able to capture their aspirations, concerns, needs, and comments.

### 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)



#### Communications and Engagement Plan

The HOK Team will develop a communication and marketing plan that will support the overall project efforts to enable our team to engage the local communities and create interest in the project and help establish trust and enthusiasm in the communities to participate in the overall Visioning process. Marketing expertise has proven that by engaging the target market on an emotional level, there will be a more successful response. Mad 4 Marketing will create that emotional hook that will inspire people to want to be a part of this process. The Team will create an overarching theme that can be translated across various channels, and properly address and appeal to the diverse audience.

In addition to the messaging, the approach will include a creative perspective. We will utilize innovative and progressive techniques to reach people on all different levels. For example, we might initiate mobile text messaging to reach the younger generation. Because we are already deeply immersed in the City, it will be realistic to be able to take full advantage of public forums, the Chambers, and to build other partnerships to assist us in our outreach efforts to reach certain portions of the population on a more economical scale. Once the theme and the messages are created, HOK, along with the City Visioning Committee, will determine the channels to use to engage with the community.

The community communication and engagement plan will span the entire duration of the Visioning for the Next Century project and may have legacy and sustainable attributes that will deliver value to the city long after the project is delivered if the City chooses to adopt the aspects of the program as continuing community engagement.

#### Value and benefits:

Strong messaging will drive people to the web site, drive people to attend the town meetings, drive people to complete surveys. A clear understanding of the creative process that it takes to develop that theme, the expertise in developing those messages and sharing them in the most creative, relevant way, will be a key factor in the success of this project.

The following paragraphs is an overview of the technology tools that we will use to engage with the project team, the City and the residents of the City. HOK and Tara Group have the technology and tools to reach the City's stakeholders in various and effective proven methods.

#### Project Team Collaboration

HOK ProjectWeb will be used to facilitate collaboration among the project team and client participants. This application is available on the Internet, and allows the team to share documents, track issues, and post calendar events and meeting notices throughout the course of the project. HOK has developed a template that allows content (logos, photos, text) that are unique for each project web site.



### 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

Other features include automatic email notices of new postings, add calendar events to Outlook, track drawings, unique access levels by user and group, image gallery, news releases, message boards, and team contact directory.

#### Online Surveys for Public Opinions

We will also use SurveyWeb to build, deploy and analyze surveys solicited to the public. The HOK team will create the surveys and provide an email and web link for online responses. Paper copies of the survey can be provided for those who do not have access to a computer or Internet, the data can then be entered manually by others. HOK will provide graphical and qualitative reports based on the collected responses.

#### Public Facing Website

We recommend a public website with a domain name unique to the project. HOK will design, setup and host the public website. The design will be approved by the client. HOK will provide training, support and content management of the public website for the duration of the project. We have allowed support allowance of hours of 20 hours a month for the duration of the project.

The website will allow HOK and assigned project team members to add new information to the site with simple web-based administration. The community can visit the site anytime for up-to-date information and notifications about the project, with the added ability to sign up for automatic email notices when new items are posted to the site.

The website will provide

- "About the Project" information
- News postings providing public news and updates throughout the course of the project
- Calendar of public events and meetings
- PDF file directory for meeting notes and other public documents related to the project
- Image gallery for renderings, photographs and other images related to the project for public display
- Project and city representative contact information, newsletter sign-up, and survey links

#### Geographic Information Systems (GIS)

Geographic Information Systems (GIS) mapping is a powerful platform for joining and visualizing data elements in a spatial environment. Because each point or feature on a map links to a database table, attributes can be displayed based on a variety of criteria. Furthermore, multiple data tables can interact based on their location, so counts, distance calculations, and other data elements (Census Tracts, for instance) can be aggregated in a tabular format. This interaction saves time, supplies perspective and can produce significant financial gains in any organization's operations.





## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

The HOK Team will use other technology tools and aids such as instant polling and quantitative analysis software to collect input and to analyze the information collected.

### Outcomes

- Tailored methodology for Fort Lauderdale conditions
- Understanding of current conditions and potential gaps
- Clearly defined processes
- Tools defined and tailored for specific project purposes
- City Visioning Committee understands and agrees on methods
- Methods and tools approved by City
- Team understanding of existing conditions

### Value and Benefits

A successful strategy implementation requires the implementing team and the client to understand how the project will be deployed, the purpose for the tools to be used in carrying out the project, and energetic support by the City officials of the team and the way the project is implemented. To do this the HOK Team will define what we will do, how we will do it and when. We will also identify the support we will need from the City and the stakeholders to be successful. The greatest benefit derived from this phase is the establishment of trust between the City and the HOK Team that the program is well defined and positioned for success.

### Basic Level

1. Review information provided by City and conduct a “desk top” and selected “drive-by” conditions assessment.
1. Methodology and tools for conducting 3 Town Halls meetings -1 each corresponding to the social-economic-geographic communities of Fort Lauderdale
2. One (1) electronic/virtual survey

### Moderate Level

Add to moderate level

1. Conduct selected key facility Conditions Assessment. Includes:
  - a. City Hall
  - b. Two other facilities chosen by the City Visioning Committee
2. Forums Group 12 total meetings with
  - i. Civic organizations
  - ii. Students
  - iii. Cultural groups
3. Develop methodology and tools for Social Media canvassing



## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

### Comprehensive Level

Add to Moderate Level

1. We will engage with the City to define the extent of research, testing, forensics, and investigations that need to be included in a robust City-wide Conditions Assessment. Based on that clear scope of work and intent, HOK will submit a revised Statement of Work, team members
  - a. City Facilities
  - b. Waterways
  - c. Beaches
  - d. Neighborhoods
  - e. Economic activities
  - f. Educational resources
  - g. City government structures
  - h. Regional/related government structures
  - i. Available demographic information
  - j. Important collectable facts about the City
  - k. Ecological
  - l. Social concerns
  - m. Sustainability assessment
2. Conduct 24 total meetings via:
  - a. Town Halls
  - b. Forums and Leadership workshops
3. Develop methodology and prepare IT tools for Online communities

### PHASE 3

#### COMMUNITY ENGAGEMENT & DATA GATHERING (APPROXIMATELY 10 WEEKS)

The Community Engagement and Data Gathering Phase is the active part of the project where the HOK Team will be actively leading a community-wide public dialogue with the residents of Fort Lauderdale per the plan that was refined in the Project Development Phase to collect data for the Vision Statement(s) and the development of a related Vision Action Plan(s). We will work with the City Visioning Committee, business, civic organizations, religious institutions, non-profit entities, City of Fort Lauderdale management and staff, home owner associations, community and selected regional organizations as outlined in the RFP and agreed upon in the previous phases of this Scope of Work Phases to collect city-wide observations, opinions, wishes, dreams and recommendations detailing:

- What is good/right/don't change
- Concerns
- Visions
- Actions needed to achieve visions

The HOK Team will also bring to the engagement a global perspective gained through our Advance Strategies and Planning Groups involvement in urban planning and design and Visioning/Problem Seeking engagements and experience. We will provide best of class



## 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

examples and recommendations that may help inform the City of Fort Lauderdale in the formulation of the City's Vision and Action Plan.

This phase of the project will involve extensive interaction with the citizens and stakeholders of the City as mentioned above. The multi-disciplinary team that we bring to this project has the experience and expertise at all the critical aspects that this phase requires. The Tara Group will be leading the research efforts and the public hearing facilitations supported by the HOK technology and strategic planning experts. The communications strategies and content will be lead by Mad4Marketing experts. Together we will collect the information and input needed to allow the HOK Team and the City Visioning Committee to be successful in formulating the Vision for the City.

### Outcomes

- Collected information from stakeholders
- Engagement of key community stakeholders ensures a transparent process and a participatory process
- Understanding from all stakeholders
- Good data to inform the Visioning Workshops
- Good best of class benchmark examples

### Value and Benefits

The City of Fort Lauderdale stakeholders will have an opportunity to contribute in the formulation of the Vision for the Next Century and thereby become more interested and active in the support of implementing the subsequent Action Plan.

### Basic Level

1. Conduct 3 Town Halls meetings -1 each corresponding to the social-economic-geographic communities of Fort Lauderdale
2. Launch One (1) electronic/virtual survey
3. Review existing HOK Benchmark on City Best of Class attributes and strategies

### Moderate Level:

Add to moderate level:

1. Implement Forums Group 12 total meetings with
  - a. Civic organizations
  - b. Students
  - c. Cultural groups
2. Implement Social Media canvassing

### Comprehensive Level:

Add to Moderate Level:

1. Conduct 24 total meetings via:
  - a. Town Halls
  - b. Forums and Leadership workshops



### 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

2. Develop methodology and prepare IT tools for Online communities

#### PHASE 4

##### VISIONING WORKSHOPS (APPROXIMATELY 2 WEEKS)

The HOK Team will analyze and synthesize the data and information gathered during the meetings and the responses collected via virtual media during Phase 3 to discover common themes, ideas, needs and opportunities identified by the Fort Lauderdale citizens. We will review our knowhow of trends and best practices in city planning and operations to inform the creation of options for draft vision statements. The HOK Team will conduct a pre-visioning workshop internally to identify inputs and drivers that will be used in the workshop with the City Visioning Committee.

The HOK Team will convene and lead an interactive visioning Workshop with the City Visioning Committee to craft the Draft Vision for the Next Century and Preliminary Vision Action Plan. The Vision will take into account input from all the community comments collected in Phase 3 as well as benchmark best practices from our knowledge gained from our urban planning and design experience for communities around the USA and globally.

The HOK Team will develop a Draft Vision for the Next Century presentation the City Visioning Committee for preliminary approval. Once approval is given, this Draft will be used in Phase 5 presentations to the City Council and to City Residents.

##### Outcomes

- Summary report of comments from Phase 3 organized and prioritized based on alignment with City goals and frequency of “votes” or comments on topics.
- Draft Vision for the Next Century.
- Preliminary Vision Action Plan

##### Value and Benefits

The Draft Vision will be created from input from all areas of the City of Fort Lauderdale. This will make the Draft Vision for the Next Generation the City’s product and one that all can recognize their input into the Vision.

##### Basic Level

1. Draft Vision for the Next Generation.
2. Preliminary Vision Action Plan.

##### Moderate Level

1. Draft Vision for the Next Generation.
2. Preliminary Vision Action Plan.



### 3. PRELIMINARY SCOPE OF SERVICES

(CONTINUED)

**Comprehensive Level:**

1. Draft Vision for the Next Generation.
2. Preliminary Vision Action Plan.

HOK can review with the City Visioning Committee the level of Planning they would like to pursue in a FIT program. HOK will submit an addendum for additional scope and fee to conduct a tailored FIT

**PHASE 5**

**FINAL CITY VISION REPORT (APPROXIMATELY 8 WEEKS)**

The HOK Team will present the Draft Vision for the Next Century to the community in a series of four (4) Town Hall Meetings. We will use instant polling to collect community reaction and voting that will allow us to refine the priorities in the Vision. The comments collected in the Town Halls will be used to refine the Final Vision and Action Plan which is then presented to the City Visioning Committee for approval. The approved Vision for the Next Century and the prioritized Action Plan is then presented to the City Council for approval and adoption.

**Outcomes**

- Final Vision for the Next Century.
- Final prioritized Vision Action Plan.

**Value and Benefits**

The Final Vision for the Next Century is the product of all areas of the Fort Lauderdale community and City managers and staff. Thereby, it is understood and accepted. The prioritized Vision Action Plan provides the City a framework to guide the implementation of the programs and actions required to achieve the Vision.

**Basic Level**

1. Final Vision for the Next Generation.
2. Final Vision Action Plan.

**Moderate Level**

1. Final Vision for the Next Generation.
2. Final Vision Action Plan.

**Comprehensive Level**

1. Final Vision for the Next Generation.
2. Final Vision Action Plan.



## 4. YEARS OF EXPERIENCE

### **HOK**

HOK Advance Strategies is a multidisciplinary group of thought leaders, analysts, strategists, listeners, planners, researchers, communicators and change agents who use our knowledge and experience to help organizations navigate through complex business challenges. We have offering strategic planning and visioning for the past 55 years.

Our practice extends the reach of traditional architecture services by focusing on the needs of clients over the entire lifecycle of buildings. We help to develop and implement strategies, design and implement solutions, and manage and operate facilities over time. Our value proposition is this end-to-end service, maximizing your portfolio, facilities, and workplaces.

### **MAD 4 MARKETING**

Mad 4 Marketing has more than 17 years of experience in building innovative and strategic marketing plans that deliver results and a return on investment.

### **THE TARA GROUP**

Linda Flynn has over 10 years of experience working with private and public sector clients implementing comprehensive qualitative and quantitative research studies, working with clients to develop the best methodology for their project needs.

### **FAITHFUL+GOULD**

Faithful+Gould is a unique firm that has accredited building forensic and cost estimating engineers and experts. F+G also brings a business focused approach to analyzing your facility portfolio and has been doing so since 1947. We look beyond the building shell and systems in our analysis and identify how to optimize your investments in your real estate.



# KENTLANDS BOULEVARD

## COMMERCIAL DISTRICT MASTER PLAN

Gaithersburg, Maryland

### SIZE

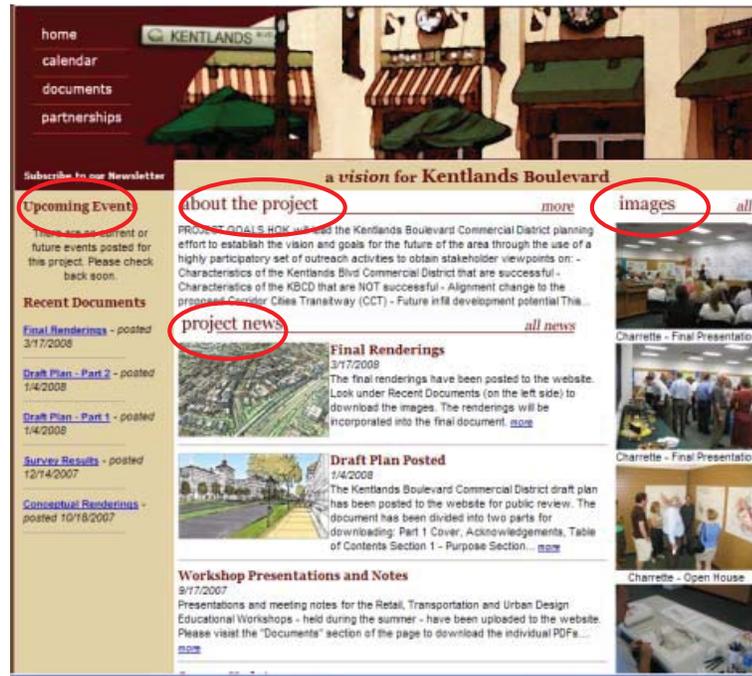
80 acres  
32 hectares

### SERVICES

Website Development, Master Planning,  
Urban Design

### COMPLETION

Adopted May 2008



As part of the City of Gaithersburg’s Master Plan update, HOK was engaged to produce a plan for the Kentlands Boulevard Commercial District. The initial plan wisely arranged the typically suburban uses in a grid of streets, envisioning a future time when much more development could be accommodated in a more urban form.

HOK’s scope included a vision for the future character of a 3-12 story Kentlands Boulevard Commercial District (based on market demand and other influences), a recommendation for the transit station to be located within the Town Center, and a series of short-term changes that better link the southern sector of the KBCD (Market Square) with the northern sector (Kentlands Square), “taming” Kentlands Boulevard. Through a series of educational workshops, a

public charrette, a dedicated project website and a telephone survey, HOK was able to balance the desires of the neighboring communities, business owners and property owners, and is producing a plan was adopted by the City in early 2008.

The website provided project updates, renderings, Town Hall meeting notices, meeting notes, news releases, and other community information about the project. Anyone interested could subscribe to automatic e-mail notices when new items were posted to the site.

The website provided easy content updates and postings to authorized administrators through simple web-based forms. HOK provided all website services, including graphic design, web hosting, content

management development, and automatic e-mail services.

HOK was supported on the effort by a retail, residential and office market analyst (Retail Compass) a transportation and traffic engineering consultant (the Traffic Group) and other stakeholder groups.

Additionally, the Maryland Transit Authority (MTA) is considering a transit line that will eventually link Shady Grove metro Station (currently, the “end of the line” in the Washington, DC area’s Metro system) and Urbana, Maryland – relieving traffic from the I-270 corridor. The MTA plan has shown the transit stop for this area across a major roadway in an area of commercial office development.



# DETROIT METRO TOURISM

VISION AND MASTER PLAN

Detroit, Michigan

## SERVICES

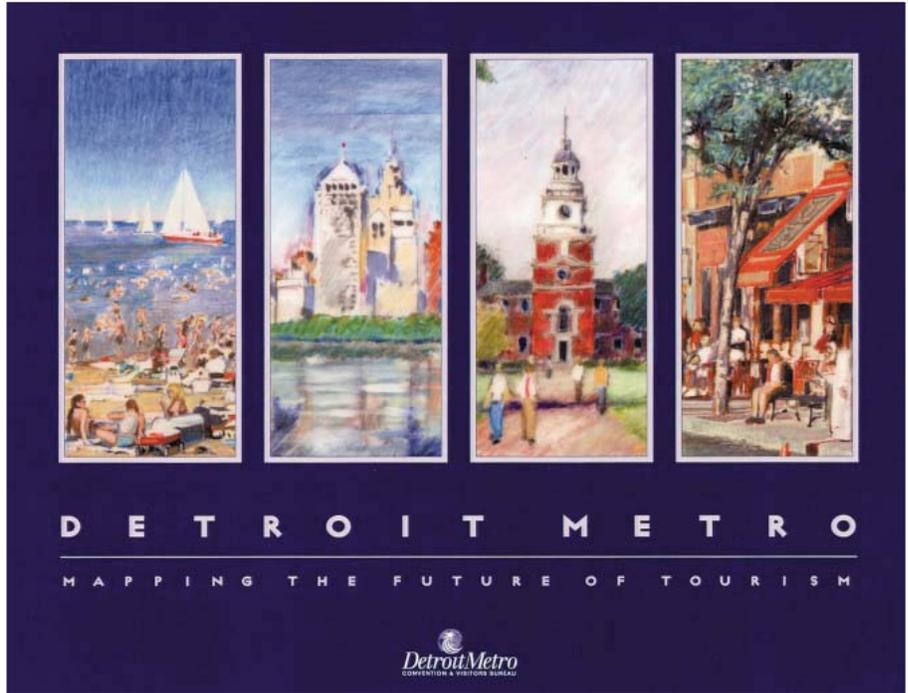
Master Planning, Promotional Graphics

## COMPLETION

2001

## COST

N/A



HOK prepared physical master planning strategies and promotional graphics for an extensive civic leadership campaign to increase tourism in the Detroit metropolitan region. The MetroDetroit Convention & Visitors Bureau recognized the importance of tourism to the region and created an alliance of civic leaders, local agencies, municipal and state agencies to implement a focused and measurable strategy for increasing tourism. The study focused on six key strategies to achieve this goal. They were:

- Improve Metro Detroit's arrival appearance and experience,
- Develop a safe and secure visitor experience,
- Improve the service and public transportation for visitors,

- Commitment of regional collaboration,
- Develop new attractions, and
- Market Metro Detroit as a distinctive destination.

A promotional booklet outlining the goals and methods for achieving the vision was prepared to explain to the community the economic benefits of the vision. HOK was responsible for the overall graphic design, composition, specific illustrative graphics and print management for the 1200 booklets.



## 4. YEARS OF EXPERIENCE

(CONTINUED)



### **BROWARD COLLEGE**

#### **Background**

As the agency of record for Broward College since June 2005, Mad 4 Marketing provides research, strategic planning, brand awareness and enrollment programs; special event promotions; internet marketing; new program launches; media planning and negotiating; and complete creative services including print advertising, brochures, trade show booths, TV and radio spots, infomercial DVDs, vehicle wraps, out of home including theater and mall advertising, and non-traditional advertising.

As part of a comprehensive research program using qualitative and quantitative methodologies for long-term marketing planning, we measured pre- and post-awareness levels among the College's constituents, including current students, potential students, and the community-at-large. We conducted focus groups, household surveys, and staff and business community interviews.

In addition to rebranding and repositioning the College, the Mad 4 team was responsible for the name change transition when the institution was given Southern Association of Colleges and Schools (SACS) accreditation to offer five, new Bachelor of Science Teaching Education degrees.

#### **Challenge**

How do we maintain the roots of a community college while reaching out to a new student population seeking four year degrees with a very limited media budget?

#### **Objective**

To educate the public of Broward College's name change and introduce new bachelor's degrees, and new online programs while driving enrollment.

#### **Tactics**

The results of the comprehensive research program were translated into action items for marketing and public relations initiatives.

- Worked in tangent with the staff to generate input regarding where they would like to see the college positioned.
- Amalgamated enrollment and branding campaigns using a consistent theme to reinforce the message and more effectively penetrate the market.
- Updated the BC logo to position BC as a unique and identifiable symbol of higher education by graphically differentiating its image from the competition.
- Integrated measurement mechanisms in all advertising to better gauge results and re-evaluate the plan accordingly.
- Assisted with internal communications training to ensure all faculty and staff were speaking the same brand language, campus-wide.
- Collaborated with other BC entities including the Institute for Economic Development, the Automotive Technology program and the BC Foundation on their own internal advertising programs.



## 4. YEARS OF EXPERIENCE

(CONTINUED)

- Created an animated :30 television spot in less than 4 weeks prior to the name change launch.
- Utilized non-traditional mediums such as movie theaters, shopping malls, street teams, bus sides and on-campus signage to communicate the name change as well as new 4-year and online degrees.

### Results

The “Name Change” Campaign was so well-received by prospective 4-year and online degree students, that Broward College met their new student enrollment projection goal in the first term and maintained retention of existing students. Overall, since Mad 4 Marketing has been agency of record, enrollment has increased an average of 15% college-wide.

We’re also proud that Broward College received the 2007 Exemplary Practice award by the Florida Association of Community Colleges for its “Word” advertising campaign and the FACC also awarded the campaign the statewide Best Television Advertisement, Best Radio Advertisement and Best Print Advertisement. In addition, the National Conference for Marketing and Public Relations, an affiliate council of the American Association of Community Colleges, gave the Mad 4 Marketing campaign two Bronze Medallion awards.



### FLORIDA’S TURNPIKE ENTERPRISE SUNPASS RELATIONSHIP MARKETING PROGRAM

As a sub-contractor to KPMG for the Florida’s Turnpike, Mad 4 Marketing implemented a full marketing plan designed to meet the needs and goals of the Florida’s Turnpike Enterprise relationship marketing program. In order to ensure all key initiatives were proactively handled, and professionally overseen, Mad 4 Marketing dedicated an employee solely to the implementation of the program. Due to the uniqueness of the situation and a desire to have the project manager immersed in the culture of Florida’s Turnpike, the project manager (also called a relationship marketing specialist) is based out of the Florida’s Turnpike offices.

In 2005, as part of the effort to improve customer service and to raise awareness of Florida’s Turnpike and its services, Mad 4 Marketing wrote and implemented a full marketing plan designed to meet the needs and goals of the Florida’s Turnpike Enterprise relationship marketing program. The goals of this program are directly aligned with the Turnpike’s overall goals and are as follows:

- act as an educational resource about Florida’s Turnpike services
- provide on-site customer service for Florida businesses and residents
- drive sales of SunPass®



## 4. YEARS OF EXPERIENCE

(CONTINUED)

In order to ensure all key initiatives were proactively handled, and professionally overseen, Mad 4 Marketing dedicated an employee solely to the implementation of the program. Due to the uniqueness of the situation and a desire to have the project manager immersed in the culture of Florida's Turnpike, the project manager (also called a relationship marketing specialist) is based out of the Florida's Turnpike offices

### Tactics

#### 1. Corporate Outreaches

In-house events carried out for large corporations located within a 10-15 mile radius of the Florida Turnpike Enterprise's mainline. SunPass offers employees benefits such as educational information, promotional items and a special discounted price on SunPass transponders. This tactic requires:

- An aggressive call effort
- A user-friendly customer database to track and measure progress
- Collateral and presentation materials

#### 2. Sponsorships

Sponsorship of major family-oriented public events throughout the state such as SunFest, the Delray Affair and St. Stephen's Art and Craft Show allow SunPass to provide the general public the same benefits offered to major employers through corporate outreaches. It is also an excellent vehicle to perform surveys and obtain fresh feedback from both SunPass customers and non-customers regarding SunPass and the Turnpike. This tactic requires:

- An objective matrix by which to analyze the sponsorship opportunities and determine which align best with the programs objectives
- Pre- and post-event processes and evaluations
- A reliable staffing company to provide event staffing support
- A training process for event staff
- SunPass booth banners and collateral material

#### 3. SunPassages Newsletter

To communicate the benefits, act as an additional educational resource about Florida's Turnpike services, and keep the public awareness level high, Mad 4 Marketing also conceptualized, designed and produced this newsletter. The purpose of the mailing was expanded to include customer satisfaction surveys and additional enhancement updates. That newsletter concept is still being utilized, and is also available digitally on the SunPass site.

- Turnkey production of project, design and copy through mailing
- Mailed to a database of over 2,000,000 customers

### Results

- More transponders were sold through sponsorship and outreach events in the first quarter of 2006, than were sold throughout the whole program in 2005
- We have exceeded the number of outreach events objectives for the first quarter as outlined in our marketing plan for the year
- We have also exceeded the number of sponsorship events for one quarter



## 4. YEARS OF EXPERIENCE

(CONTINUED)

In addition to breaking sales and attendance records, the program has established procedures and acquired tools that will ensure the continued success of the program in the quarters and years to come. These include:

- Securing a wireless credit card machine for all events
- Implementing a \$19.99 discount for transponders
- Participating in the first series of corporate outreach events with a retail chain
- Significantly increasing traffic to the SunPass website through education of features available on the website at sponsorships and corporate event.

### The Tara Group

#### **BROWARD COUNTY GOVERNMENT, FORT LAUDERDALE, FL (2009-PRESENT)**

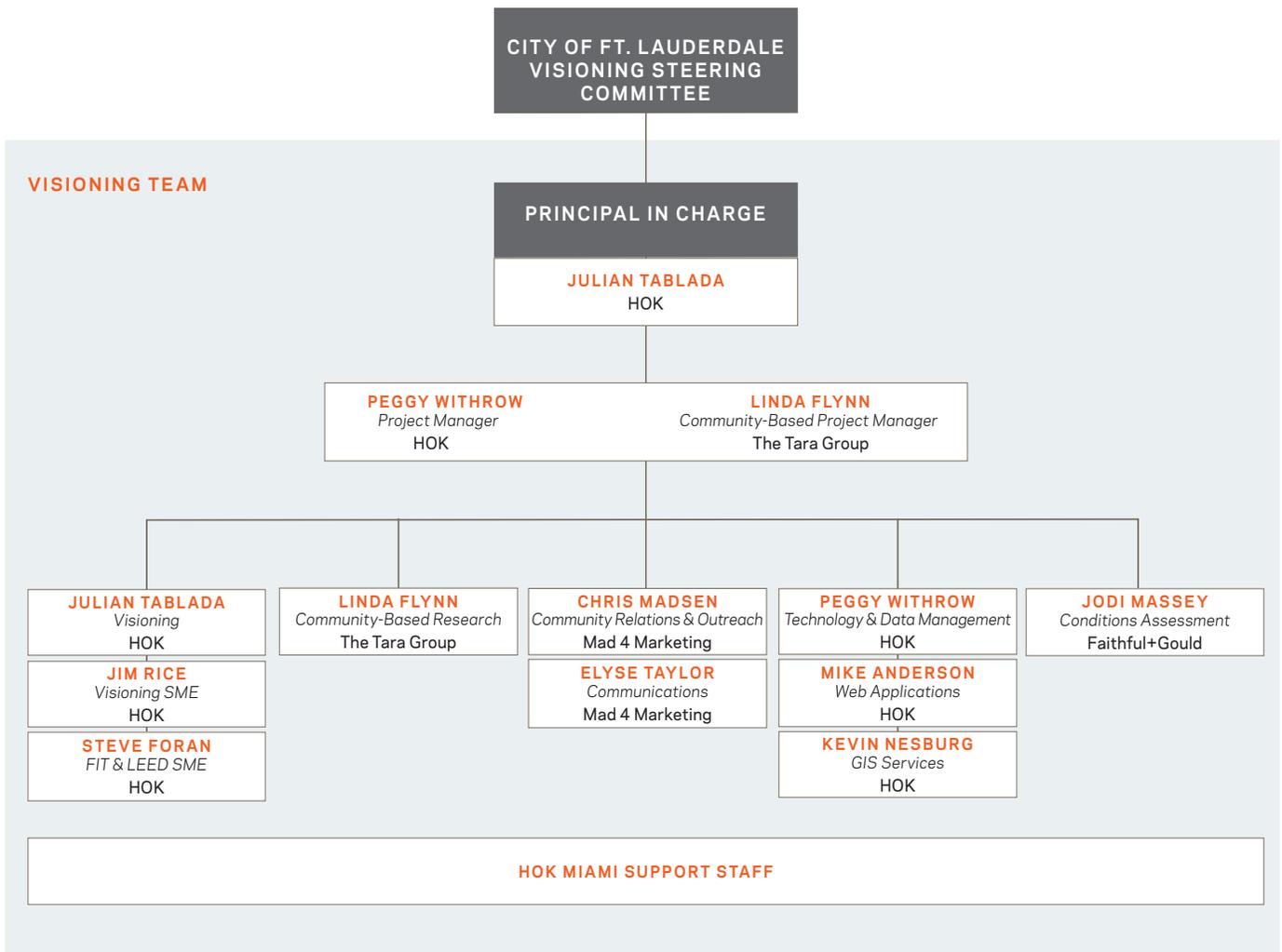
Partnering with Cultural + Planning Group (San Diego, CA), conducted a countywide study for the development of a 10 year Arts & Cultural Plan for Broward County. The mixed method study included in-depth interviews with political and business leaders, focus groups with residents and government staff, town hall meetings community wide surveys, and organizational surveys. The Tara Group was responsible for assisting with community data gathering methodology and implementation, and analysis and reporting of data.

#### **BROWARD COLLEGE**

Conducted large-scale perception and awareness study including household surveys, focus groups, business community/leader interviews to define community brand for the college. The Tara Group worked closely with advertising agency of record to develop full-scale marketing and communications campaign including traditional and online media.



# 5. ORGANIZATIONAL CHART AND RESUMES





## JULIAN TABLADA, AIA, LEED® AP

Vice President | Specialist



Julian Tablada, AIA, is a Vice President with HOK Advance Strategies in Atlanta, Georgia. He is responsible for providing planning and advisory services that inform clients how to strategically deploy their resources — for real estate, facilities, and workplaces — to achieve business objectives and gain competitive advantage.

Tablada has over 31 years of experience in providing strategic planning, workplace strategies, facility process improvement, architectural programming and design, project management, CAFM solutions, as well as in marketing and sales. Prior to joining HOK he was a principal with Facility Resources / DBAssociates, an international facility management and consulting firm.

Tablada has worked with corporate, institutional, and government clients including American Express, Progressive Insurance, IMG Academies, Georgia World Congress Center, U.S. General Services Administration, and Florida International University.

### EXPERIENCE

#### Georgia World Congress Center

*Atlanta, Georgia*

The Georgia World Congress Center (GWCC) conducted a Visioning Engagement called Idea Forums to set the Vision for the future of the GWCC to succeed into the future and continue to provide exceptional service to its customers, the City of Atlanta, and the surrounding neighborhoods. The plan will chart the course for all future development on the in-city campus and guide its actions with the communities that adjoin its campus. Tablada organized and lead a Visioning effort that included Idea Forums with representatives of the GWCC stakeholders. Those stakeholders included Customers that use the facilities such as the Southeast Conference, Southern Baptist Association, Members of neighboring communities and GWCC staff. The forums identified what's working, what's not working, and what's missing which informed HOK to formulate a vision for the future of the GWCC that is now being implemented.

#### American Express BlueWork Global Training Program

*Global Locations*

American Express designed and adopted a new workplace environment program (branded BlueWork) developed by a consortium of workplace experts including HOK Advance Strategies. BlueWork pilots were successfully implemented in the company's Europe Middle East Area (EMEA) and Japan Asia Pacific Area (JAPA) Regions. BlueWork won the American Express Chairman's award for Innovation in 2007 for the way the program would transform the company's workplace portfolio from a necessary expense to a strategic tool in achieving the company's business goals. In 2007 -2008 BlueWork was ready to implement globally. American Express asked HOK to develop a global training program to introduce BlueWork to the organization's personnel responsible for relationship management, planning, master planning, design, project management and implementation of all future BlueWork projects. The training needed to relate to all the staff positions/roles within GRE&PS that were directly responsible for the successful rollout of the program on a global scale.

#### Ft. McPherson Master Plan

*Atlanta, Georgia*

Ft. McPherson army base will close on September 2011 and be turned over to the McPherson Land Redevelopment Association (MILRA). HOK is leading the planning for the 488 acre site and guiding the development of all aspects of creating the Vision for the new mixed use community including Setting the Vision, identifying development framework, urban design, planning, and leading the business plan that will be used to transfer the property from the US Army to MILRA. Tablada is the project manger leading the multidisciplinary team in the developing the Master Plan.

### EDUCATION

Louisiana State University  
*Baton Rouge, LA; Bachelor of Architecture, 1977*

### REGISTRATIONS

Architect - Georgia # RA007673  
LEED® Accredited Professional  
NCARB

### MEMBERSHIPS

American Institute of Architects



## STEVE FORAN, LEED® AP

Senior Associate | Senior Consultant



Steve is a Senior Consultant with HOK Advance Strategies. He works with Higher Education, Corporate and Government clients providing leadership in master planning, facility planning/programming, and the development of real estate and sustainable strategies. As a critical piece of these engagements, Steve facilitates the initial visioning and goal setting work sessions to ensure that all stakeholders are aligned and working toward a common target. He is skilled in translating complex information into specific, targeted, measurable outcomes and communicating it to a variety of audiences in a clear and understandable manner.

### EXPERIENCE

#### Atlanta Benchmarking Group Corporate Headquarters

Atlanta, Georgia

Since 1996, HOK Advance Strategies has led a group that has included facility and real estate executives from the following Fortune 500 Companies with Corporate Headquarters facilities based in Atlanta: The Coca-Cola Company; BellSouth; Home Depot; United Parcel Service; Turner Properties, Inc.; InterContinental Hotels Group; Hewlett-Packard Company; Georgia Power Company; AGL Resources; Delta Air Lines; and, Equifax. The group, named the Atlanta Headquarters Benchmarking Group, meets bimonthly to discuss benchmarking and performance data, "Best Practices" and other issues relating to the delivery and costs of facility management services, maintenance operations costs, space standards and move costs. The participants wanted to be part of a local group that could meet regularly and, as a result, more effectively discuss best practices and the details behind their benchmarking data.

#### Wellmark Blue Cross Blue Shield of Iowa Visioning, Workplace Strategy and Programming

Des Moines, Iowa

HOK Advance Strategies teamed with Wellmark to align their business strategies with their real estate, facilities, and workplace. By focusing on creating dialogue with users at all levels of the organization, HOK designed the new Corporate Headquarters "from the inside-out". This inclusive approach was used to identify the key issues and challenges faced by Wellmark:

- Attract and retain key talent
- Increase flexibility and ability to respond quickly to change
- Create a positive impact on organizational performance and employee productivity
- Streamline end-to-end business processes.
- Eliminate barriers to collaboration and teamwork
- Raise the profile of Wellmark within the community
- Highlight healthy, sustainable principles and practices as part of Wellmark commitment to wellness

#### The Hartford Workplace Strategy and Guidelines Development

Nationwide / Hartford, Connecticut

HOK Advance Strategies partnered with The Hartford to evaluate its current workplace and accommodation standards and to develop a comprehensive, integrated, future office model: the Workplace of the Future. The overall purpose of the future office model is to ensure that the workplace is able to effectively respond to newly emerging business drivers and to enable the accomplishment of The Hartford's key objectives.

### EDUCATION

Georgia Institute of Technology,  
Atlanta, GA; *Master of City Planning, 2002*  
*Bachelor of Science, 1997*

### MEMBERSHIPS

*American Institute of Architects*  
*Associate Member*  
*Urban Land Institute*

### PUBLICATIONS

*Fort Jefferson - Dry Tortugas National Park*  
*World Heritage Papers, Series 19, (American*  
*Fortifications and World Heritage Convention);*  
*January 2007*

### SPEAKING ENGAGEMENTS

*Meeting of Experts for the Recuperation of*  
*American Fortifications*  
*Guest, Campeche, Mexico; March 2004*

*Fort Jefferson & the Use of GIS in Condition*  
*Assessments*  
*Guest Lecturer, National Park Service Spatial*  
*Odyssey, Orlando; December 2003*



## PEGGY WITHROW, CID

Senior Associate | FF&E Data Management Consultant



Peggy Withrow offers 30 years of experience in the interior architectural and real estate consulting fields, with a primary focus in strategic planning, workshop facilitation and technology integration. She demonstrates strong skills in communication, statistical analysis, data integrity, process mapping, facility assessment and managing work teams. Peggy understands how to integrate and facilitate culture change and her experience in the public and institutional industry provides a solid knowledge of technology, business processes and government related issues. This experience enables Peggy to help support the Visioning team to develop a Roadmap that strikes a balance between financial, real estate, human resources, smart growth and government issues. Her approach to projects incorporates top-down and bottom-up communication, effective facilitation and leadership of the change process.

### EXPERIENCE

#### Genentech Real Estate Strategy Model

*San Francisco, California*

HOK was charged with developing an RFP that described a comprehensive Facility Planning Model (FPM) that would translate space drivers using agreed upon metrics into fully characterized demand. The model was also expected to perform high level gap analysis between facilities supply and demand. The overall strategy was to define functional requirements required to successfully deliver the vision, identify which functional requirements were not being met and develop a plan of action for meeting these requirements. Since the Facility Planning Model was not merely a “software solution”, it was determined it would be most expeditious if the total system solution was developed in phases. The most important issues to address were data validation and automating as many reports as possible.

#### San Mateo County

*San Mateo County, California*

HOK is developed a strategic facility master plan for all of San Mateo County’s facilities, consisting of over 3 million s.f. of owned and leased space in over 100 buildings accommodating approximately 5,000 staff. The objectives of the study included achieving optimum utilization of assets, cost effectiveness, an improved campus and work environment, support for public service, and addressing staff attraction/retention issues. Addressing this challenge required several steps, starting with Needs Assessment and continuing through assessment of existing sites and buildings, establishing location and lease vs. own criteria, recommending key metrics, and doing site master planning studies for the County’s three primary campuses.

Facing severe resource cuts and mounting service demands, the County urgently needed a more deliberate and principle-guided approach to managing its properties. The top priority was to develop a Property Management tool to systematize all the relevant data needed to plan. Goals included improved asset utilization, reduced occupancy costs, increased equity & quality of workspace to attract-retain staff. HOK created a pilot that centered on the county’s core most Government Center property to be interwoven with development of a portfolio-scale strategic plan. The pilot demonstrated the value of an IWMS systems by creating the basic chassis for ongoing property management tools and processes, resulting in quantifiable key metrics.

### PROFESSIONAL REGISTRATION

Certified Interior Designer  
Minnesota: ASID Certified, National Council for Interior Design Qualification

### MEMBERSHIPS

CoreNet Global, Associate Member/Program Committee  
Minnesota Coaches Association (MCA)

### SPEAKING ENGAGEMENTS

*Benchmarking Facilities for Performance;*  
IFMA, Minneapolis, Minnesota; April 2004

*Alternative Workplace Strategies & Organization Performance Metrics: What We Have Learned;* IFMA, Minneapolis, Minnesota; March 2000

*Adding Value through Workplace Design: How Can We Measure Performance Improvement?*  
IFMA World Workplace, Los Angeles, CA; November 1999

*Benchmarking: An Integral Part of Strategic Facility Planning;* FMA, Minneapolis, Minnesota; March 1999



## MIKE ANDERSON, CID

Senior Associate | FF&E Data Management Consultant



Mike has over fifteen years experience as an IT professional, developer and project manager, with expertise in Windows systems administration, LAN/WAN networking, Web Server Administration (IIS, DNS, ASP, .NET, SQL Server, LDAP, Internet security), Web development, SQL Server, and graphic design. Mike currently manages a team of web developers, database developers, and application support staff for client projects and HOK information systems. He also manages a technology support staff for 100+ "road warriors" working from 18 locations around the world. As a systems administrator, Mike manages several web servers, including web portals, load balancing, SQL Servers, testing and backup servers.

### EXPERIENCE

#### HOK Advance Strategies Intranet

*Global*

Mike sat on the management committee and led the development for HOK Advance Strategies Intranet system. This system allows a team of 120 employees across the globe to work together on projects and manage the business operations and information of the organization. The intranet system includes modules for Knowledge Management (KMS), Personal Development Plan (PDP), blogs, instant messaging, project groups, shared calendar, and many other collaboration components uniquely built for the company.

#### American Express BlueWork

*New York, New York*

Mike led a development team on an eight month project to create the AMEX BlueWork website; a knowledge management solution for the organization's Real Estate branding initiative. The website provides multiple levels of secure access to share and find the company's Real Estate Standards and Guidelines for their planners, facility managers and other responsible personnel.

#### Cisco Systems Guidelines & Standards Website

*San Francisco, California*

Mike led the web development efforts for Cisco's online version of their global standards and guidelines. Using a Cisco approved content management system (iStore) Mike created the templates for the site and provided training so Cisco content managers could keep the site updated indefinitely.

#### Goldman Sachs & Company Strategic Planning Project Website, New

*New York, New York*

and

#### Nortel Networks Strandherd Master Plan Project Website

*Toronto, Ontario, Canada*

Mike designed and developed a website to provide both Goldman Sachs and Nortel with real-time updates of their strategic planning initiative.

#### House of Commons Online Accommodation Questionnaire

*London, United Kingdom*

Mike designed and developed this online questionnaire to collect the responses of over 2000 employees for the House of Commons in preparation of new developments and renovations.

#### Pepperdine University Furniture Guidelines and Standards & Programmed Administration Website, Malibu, CA

Mike led the development of this online shopping cart tool, which allows faculty and university directors to view and order furniture for the new campus buildings. This tool provides an administrative counsel to add, edit or delete furniture items to maintain a current list. The shopping cart features allows employees to order and request delivery in one simple step.

### EDUCATION

University of Phoenix, Houston, TX  
MBA, 2006

Brigham Young University, Provo, UT  
*Bachelor of Arts & Secondary Education*  
*Teaching Certificate, Spanish, 1995*

### CONTINUING EDUCATION

Microsoft Corporation, *Microsoft Certified Courses, Workstation 4.0, Server 4.0, Exchange 5.5, Network Essentials, TCP/IP, Enterprise, Windows 2000 Server, Visual Basic 6.0*

North Harris College, Houston, TX; *ASP, Internet Communication, Web Development, Special Topics (Macromedia Flash), 2000*

Sam Houston University, Houston, TX;  
*Post Graduate Coursework, Network Administration, Multimedia & Network Computing, Visual Basic, & Methods of Research, 1998*

### REGISTRATIONS

Microsoft Certified Systems Engineer, TX,  
#1294596, 1999

### SPEAKING ENGAGEMENTS

Guest Lecturer, "Workplace Technologies"  
IFMA, Houston, Texas, August 2007



## KEVIN NESBURG, CID

Senior Associate | FF&E Data Management Consultant



For the last seven years, Kevin has focused on developing GIS Mapping and database platforms for OWP/P Architects in Chicago and Palo Alto; exploring new ways to aggregate and visualize information for problem solving and analysis purposes.

Kevin has published articles while working as a freelance journalist.

### EXPERIENCE

#### Waste Management

*San Francisco, California*

To expand mapping capabilities for the Corporate Real Estate (CRE) Department, developing advanced territorial sampling methods, demographic fingerprinting, customer service zone reporting and web-based mapping applications.

#### Waste Management

*Chicago, Illinois*

Kevin managed client relations, vendor relations and project implementation for the Waste Management CRE Department and the City of Chicago. Created and managed Waste Management's Spatial Strategies group, a companywide joint venture to share mapping capabilities, information and best practices; devised a system for and managed the creation of more than 7,100 maps for WM's Market Business Strategy process for their senior leadership team, saving WM \$500,000 under the lowest competing estimate' managed GIS program for WM's CRE Group, which expanded strategic GIS capabilities while creating over 3,500 strategic presentation-quality maps for all branches of the company and decreasing average product turnaround time by 75 percent. Kevin designed and managed restructured property tracking guidelines at WM to align internal database with other internal corporate entities and better position the Corporate Real Estate group as a leading supplier of information throughout the company; created GIS-enabled building condition reporting and expenditure forecast system; designed program for WM and leveraged GIS to generate optimal relief sources for continued operations in Gulf Coast markets afflicted by Hurricanes Katrina and Rita; and developed approximately 600 strategic maps modeling lease consolidation, personnel estimates and other facility-related projects for the State of Illinois. He managed more than 41 architectural and engineering professionals from 13 firms working on 55 code/permit review projects outsourced by the City of Chicago with revenue of approximately \$1M; and developed a database for code reviews that generated proposals and tracked projects, review status, contract issues, personnel and expenditures.

### EDUCATION

Kalamazoo College, Kalamazoo, Michigan,  
*Bachelor of Arts, English June 2000*

Universität Bonn, Bonn, Germany 1998-  
1999

### PUBLICATIONS

Published in *The Wednesday Journal*, Oak  
Park, IL

*Harvard Magazine*, Cambridge, MA

### HONORS AND AWARDS

Editor-in-Chief, *The Index* (Newspaper), 2000  
Second City Training Center, 2001-2002



## CHRISTINE MADSEN

President & CEO | Mad 4 Marketing Strategic Planning Team, Marketing Development

1992 to Present: Founded Mad 4 Marketing, Inc. (formerly InterMedia), a full-service marketing communications agency that provides advertising, design, interactive marketing, and strategic marketing campaigns for clients throughout South Florida and the United States. As President, Ms. Madsen has owned 100% of Mad 4 Marketing since its inception and the average annual sales exceed \$5 million.

Chris has spearheaded branding and marketing campaigns for such clients as the Greater Fort Lauderdale Convention & Visitors Bureau, Florida's Turnpike Enterprise, Broward County Transit, and Broward College. Her team has also worked together with Baptist Health South Florida, Fort Lauderdale-Hollywood International Airport, and Port Everglades. Under her leadership, Mad 4 Marketing provided a complete Relationship Marketing Program for Florida's Turnpike / SunPass, which primarily incorporated a major corporate outreach program which extended throughout Dade, Broward and Palm Beach counties.

Prior to founding Mad 4 Marketing, Chris served as Vice President of Sales for a major graphic design and commercial printing company located in Fort Lauderdale. During this time, annual sales grew from \$1million to \$11million. She oversaw all marketing and new business development efforts, was integral in providing community awareness through her involvement in many organizations, and oversaw a team of 12 sales people. From 1968 - 1981 Chris worked in the field of Bank Marketing. She created and headed marketing departments for Barnett Bank and several independent banks and headed up all new business development programs, major events and openings as well as all public / community relations efforts.

### COMMUNITY INVOLVEMENT

School of Bank Marketing, Boulder, Colorado; AS, 1974.

American Institute of Banking

### COMMUNITY INVOLVEMENT

Broward Women's Alliance, Past-President; Broward College, Entrepreneurship Advisory Council; Broward College, Presidents' Club; Broward Workshop. Board Member; FAU Community Advisory Council, Member; Governor's Council for Sustainable Florida, Past Board Member; Greater Fort Lauderdale Chamber of Commerce, Chair-Elect; Leadership Broward Foundation, Past Board Member; Leadership Florida, Class XXVI; Muscular Dystrophy Association, Advisory Committee Member; Stranahan House, Past President; The Commonwealth Institute, Member; The Executives' Association, Immediate Past President; The Tower Forum, Immediate Past President; Nova Southeastern University, Board Member; Urban League of Broward County, Board Member

### ACCOMPLISHMENTS/AWARDS

2007 Leadership Broward Foundation Honoree  
2005 South Florida Good to Great Award  
2003 South Florida Business Journal Woman of the Year  
2003 Women in Communications Woman of the Year Award  
2001 March of Dimes Women of Distinction  
2000 Encore Art Serve Award  
1999 - Girl Scouts of Broward County - World of Excellence Award  
1998 - South Florida Business Journal - Finalist, Small Business of the Year Award



## ELYSE TAYLOR

Vice President | Mad 4 Marketing Strategic Planning & Marketing Team Director

Ms. Taylor has over thirty years of expertise in guiding a client's key messages to evolve into effective visual communications that combine copy and graphic imagery to achieve their marketing objectives. She is a top-ranking alumnus of the renowned New York City High School of Music and Art (a.k.a. the Fame school). She went on to graduate Cum Laude with a bachelor's degree in illustration from Syracuse University. Elyse moved to South Florida in 1979. Upon her arrival, she worked as a graphic designer in the Art Department of a printing company that grew to be one of the largest in south Florida. Elyse quickly rose to the position of Art Director, especially recognized for her ability to work as a liaison between clients, account executives and artists.

### COMMUNITY INVOLVEMENT

Syracuse University, College of Visual & Performing Arts, BFA cum Laude, 1977.

High School of Music and Art, New York City, NY

### PROFESSIONAL AFFILIATIONS

Greater Fort Lauderdale Advertising Federation - Trustee and Past President  
FDMA (Florida Direct Marketing Association) -- Member  
AMA (American Marketing Association) -- Member  
FAU (Florida Atlantic University) Career Counseling - Advisory Board  
Women's Chamber of Commerce, Greater Fort Lauderdale

In 1992 Ms. Taylor and then VP of sales and marketing Christine Madsen left the printing company to create Mad 4 Marketing, a full service marketing firm that offers media buying, interactive, branding, research and strategic planning as well as advertising and creative design.

An award-winning illustrator, Elyse's expertise in graphic design gives Mad 4 Marketing the creative edge to develop an integrated marketing image for its clients. Elyse has spent the past years at Mad 4 Marketing developing and managing a diverse account base and currently oversees the creative department.

Elyse has been involved in all facets of the development of creative concepts and marketing strategies for accounts such as Broward County Mass Transit, North Broward Hospital District (now Broward Health), Broward Health Foundation, Broward Center for the Performing Arts, and Broward College, as well as being involved in the Port Everglades and Fort Lauderdale-Hollywood International Airport accounts from inception.

Enjoying the variety of clients she has come to know over the years, her responsibilities can range from managing a \$2.5 million media buy for a Swiss watch manufacturer, to acting as staff at a community outreach event on a weekend, to art directing the latest promotional campaign for a new tourism client.

Elyse has won numerous ADDY® awards over the years, for both her artwork and her art direction.



## LINDA TARA FLYNN, cld

The Tara Group | Research - Analytics - Planning



Linda Flynn works with both private and public sector clients demonstrating significant experience in end-to-end qualitative and quantitative research design, execution, and analysis. Linda focuses on effective research strategy for business, determining key drivers, providing unique insights, and translating results into actionable planning. Her extensive research background includes custom marketing research, all qualitative and quantitative research methodologies including web-based and traditional surveys, focus groups, affinity and natural groups, and one-on-one interviews.

### HIGHLIGHTS

- Designs and drives custom research plans with results that go beyond the initial research question
- Works side-by-side with clients to develop strategy and campaigns
- Firm believer that both qualitative and quantitative disciplines contribute to success
- Responsible for end-to-end services including management of teams, vendors, and client expectations
- Experience with managing large-scale projects for government, non-profit, and private sector clients
- Develops and maintains long-term relationships with clients
- Enjoys a solid network and reputation in South Florida market

### CLIENT LIST

- AAR Defense Corporation, Wood Dale, IL
- Athlone Institute of Technology, Athlone, Ireland
- Broward College, Fort Lauderdale, FL
- Broward County Government, Fort Lauderdale, FL
- Core Strategies for Non-Profits, Miami, FL
- Galway-Mayo Institute of Technology, Galway, Ireland
- Survey Systems, Minneapolis, MN
- Cultural + Planning Group, San Diego, CA
- The Jewish Federation of South Palm Beach County, Boca Raton, FL
- Mad 4 Marketing, Inc., Fort Lauderdale, FL

### EXPERIENCE

#### KPMG LLP for Florida's Turnpike Enterprise

- Oversees and conducts all online customer satisfaction studies and related surveys
- Conducts annual workforce surveys
- Conducts all market research and public outreach studies

#### Broward County Government, Fort Lauderdale, FL (2009-present)

- Partnering with Cultural + Planning Group (San Diego, CA), conducted a countywide study for the development of a 10-year Arts & Cultural Plan for Broward County. The mixed method study included in-depth interviews with political and business leaders, focus groups with residents and government staff, community wide surveys, and organizational surveys. Currently working with project and government management in drafting 10-year cultural plan based on study results.

#### Broward College

- Conducted large-scale perception and awareness study including household surveys, focus groups, business community interviews, and BC employee groups.
- Worked closely with advertising agency of record to develop full-scale advertising campaign including traditional and online media.
- Follow-up research to be conducted late 2010

#### The Jewish Federation of South Palm Beach County, Boca Raton, FL (2009)

- Employing a mixed method plan, conducted a large-scale insight study of attitudes, perceptions, and preferences of current and potential donors. This study revealed unexpected insight and perspectives into a new generation of donors for the Federation.
- The research results provided groundwork for cutting-edge advertising campaign and relationship building initiatives for the Federation, signifying a major cultural shift for Federation philosophy nationwide.

### EDUCATION

Florida Atlantic University, Boca Raton, FL  
BS, Cognitive Psychology, 1996

Certificate of Proficiency in Quantitative Research - Burke Inc. - Cincinnati, Ohio (2006)

Certificate of Proficiency in Qualitative Research - Burke Inc. - Cincinnati, Ohio (2006)

PhD - Organizational Conflict Management - Nova Southeastern University, Fort Lauderdale, FL (2012)

### BUSINESS CERTIFICATIONS

State of Florida - Minority Business Enterprise (MBE)

Broward County - Small Business Enterprise (SBE)

Broward County - Community Disadvantaged Business Enterprise (CDBE)  
South Florida Water Management District - Small Business Enterprise (SBE), Minority Business Enterprise (MBE)

### MEMBERSHIPS

Associate member, American Psychological Association (APA)

Member, World Association of Opinion and Marketing Research Professionals (ESOMAR)

Mentor, Women of Tomorrow (WOT)

Committee Member, Early Learning Coalition of Broward County



## 6. LIST OF CLIENTS

### HOK

**Greg Ossont, Director**  
Planning and Code Administration  
City of Gaithersburg - Kentlands Boulevard  
31 South Summit Avenue  
Gaithersburg MD 20877  
Planning and Code Administration  
301.258.6330  
301.258.6336 Fax

**Larry Alexander, President and CEO**  
Detroit Metro Convention & Visitors Bureau  
211 West Fort Street  
Suite 1000  
Detroit, MI 48226  
313.202.1800

### M4M

**Roymi V. Membiela**  
Assistant VP Marketing/Public Relations  
Baptist Health South Florida  
6855 Red Road, Suite 500  
Coral Gables, FL 33143  
786.596.3426  
roymim@baptisthealth.net  
2007 - Present

**Nancy Botero, Executive Director**  
Broward College Foundation  
110 East Broward Blvd., Suite 750  
Fort Lauderdale, FL 33301  
nbotero@broward.edu  
954.201.7490  
2005 - Present

**Jennifer Ryan, Marketing Director**  
South Florida Commuter Services  
5217 NW 33rd Avenue  
Fort Lauderdale, FL 33309  
954.731.0062  
ryanje@pbworld.com  
2006 - Present

### THE TARA GROUP

**Mary Becht, Director**  
Cultural Division  
Broward County  
100 Andrews Avenue  
Fort Lauderdale, FL 33301  
mbecht@broward.org

**Rick Nelson, Director of SunPass Operations**  
Florida's Turnpike Enterprise  
Turnpike Headquarters  
Mile Post 263  
Building 5315 Turkey Lake Service Plaza  
Ocoee, FL 34761  
407.532.3999 Ext. 3191  
Rick.nelson@dot.state.fl.us

**David Plettner, Principal**  
The Cultural Planning Group  
4885 Kensington Drive  
San Diego, CA 92116  
213.500.6692  
david@culturalplanning.com



September 14, 2010

To Whom It May Concern:

The consulting agreement between the City of Gaithersburg and HOK called for HOK to provide, during the term of the agreement, those services set forth in our Request for Proposals dated March 1, 2007. The consulting assignment focused on facilitating a series of community outreach activities to solicit maximum stakeholder and citizen participation including a planning charrette for the Kentlands Boulevard Commercial District and the development of near-term and long-term strategies for the community, culminating in a Draft Special Study Area Element Document. HOK was asked to analyze existing environmental, physical, transportation, and economic conditions; apply visioning principles and ideas to the analysis; and reflect community development goals and objectives for the identification of economically and environmentally feasible land uses for future reuse and redevelopment within the Kentlands Boulevard Commercial District.

HOK has broad experience in all aspects of master planning and urban design and is one of the world's leading architecture firms. HOK demonstrated its value to the City of Gaithersburg with the preparation of its Plan for the City in a timely manner and within the agreed-upon cost of the project. The Draft Special Study Area Element document was presented to the Planning Commission and Mayor & City Council on March 17, 2008 and adopted May 5, 2008. Their work on this project was impressive. HOK understood the challenges, opportunities and issues surrounding this project and met them with the utmost professionalism.

Ms. Abbey Roberson, an Associate Urban Planner, and other HOK staff provided guidance and support to City staff over and above the requirements of the contract. Community outreach is a strong political component of the planning, zoning and development process in the City of Gaithersburg. The HOK team did an exemplary job helping facilitate not one, but three public workshops prior to the multi-day charette.

City of Gaithersburg • 31 South Summit Avenue, Gaithersburg, Maryland 20877-2098  
301-258-6300 • FAX 301-948-6149 • TTY 301-258-6430 • cityhall@gaitthersburgmd.gov • www.gaitthersburgmd.gov

MAYOR  
Sidney A. Katz

COUNCIL MEMBERS  
Jud Ashman  
Cathy C. Drzyzgula  
Henry F. Marraffa, Jr.  
Michael A. Sesma  
Ryan Spiegel

CITY MANAGER  
Angel L. Jones

Ms. Roberson invested additional efforts and personal time ensuring that the public outreach component of the contract was fully addressed and accomplished to our satisfaction. The result was the overwhelming support of the local City Council officials, the Planning Commission, the local business community, and the public as a whole.

I enthusiastically recommend the services of HOK as well as Ms. Roberson for future and similar projects and I look forward to working with them once again.

Sincerely,

A handwritten signature in black ink that reads "Gregory J. Ossont". The signature is written in a cursive style with a large, stylized initial 'G'.

Greg Ossont, Director  
Planning and Code Administration



## 7. COST OF SERVICES

### PROPOSAL PAGES - PART I COST INFORMATION

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.

\$ 123,662.00 Basic Total Project Cost (not to exceed)

\$ 329,294.00 Moderate Total Project Cost (not to exceed)

\$ 845,000.00 Comprehensive Total Project Cost (not to exceed)



## 7. COST OF SERVICES

(CONTINUED)

### MODERATE SERVICE LEVEL FEE SUMMARY FEE AND RATE SCHEDULE

PHASES	Total Hours	Total Fee
SmartStart	322	\$ 47,820
Project Development	436	\$ 64,424
Data Gathering	330	\$ 49,648
Visioning	290	\$ 41,420
Report	374	\$ 56,482
Technology & Systems Support		\$ 69,500
<b>Total Moderate Fee</b>		<b>\$ 329,294</b>

Average Hourly Rates by Role Summary	
Principle	\$ 200
Project Manager	\$ 200
Visioning SME	\$ 200
LEED & FIT SME	\$ 150
Technology	\$ 140
Creative Director	\$ 175
Account Planning	\$ 150
Art Director	\$ 125
Copy Writer	\$ 125
Media Planning/Buying	\$ 100
Web Design/Development	\$ 100
Graphic Design	\$ 100
Account Executive	\$ 90
Social Marketing	\$ 90
Administrative/Clerical	\$ 65





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: Hellmuth, Obata + Kassabaum, Inc.  
 (please print)

Bidder's  
 Signature: 

Date: October 20, 2010



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/19/2010

<b>PRODUCER (770) 552-4225 FAX:</b> Ames and Gough 450 Northridge Parkway Suite 102 Atlanta GA 30350		<b>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.</b>	
<b>INSURED</b> Hellmuth, Obata & Kassabaum, L.P. 2800 Post Oak Boulevard Suite 3700 Houston TX 77056		<b>INSURERS AFFORDING COVERAGE</b> INSURER A: Zurich American Insurance INSURER B: American Guarantee & Liab. INSURER C: Lloyd's London (90%) / Lex. (10%) INSURER D: INSURER E:	<b>NAIC #</b>

## 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>	GLO5965372-02	3/1/2010	3/1/2011	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
		<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY				MED EXP (Any one person)	\$ 10,000
		<input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR				PERSONAL & ADV INJURY	\$ 1,000,000
		<input checked="" type="checkbox"/> Contractual Liab.				GENERAL AGGREGATE	\$ 2,000,000
		GEN'L AGGREGATE LIMIT APPLIES PER:				PRODUCTS - COMP/OP AGG	\$ 2,000,000
		<input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC					
A		<b>AUTOMOBILE LIABILITY</b>	BAP5965373-02	3/1/2010	3/1/2011	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
		<input checked="" type="checkbox"/> ANY AUTO				BODILY INJURY (Per person)	\$
		<input type="checkbox"/> ALL OWNED AUTOS				BODILY INJURY (Per accident)	\$
		<input type="checkbox"/> SCHEDULED AUTOS				PROPERTY DAMAGE (Per accident)	\$
		<input type="checkbox"/> HIRED AUTOS					
		<input type="checkbox"/> NON-OWNED AUTOS					
		<b>GARAGE LIABILITY</b>				AUTO ONLY - EA ACCIDENT	\$
		<input type="checkbox"/> ANY AUTO				OTHER THAN AUTO ONLY: EA ACC	\$
						AGG	\$
B		<b>EXCESS / UMBRELLA LIABILITY</b>	AUC4888081	3/1/2010	3/1/2011	EACH OCCURRENCE	\$ 5,000,000
		<input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE				AGGREGATE	\$ 5,000,000
		<input type="checkbox"/> DEDUCTIBLE					\$
		<input checked="" type="checkbox"/> RETENTION \$ 10,000					\$
C		<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>	B0146LDUSA0903767	12/15/2009	12/15/2010	WC STATUTORY LIMITS	OTHER
		ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)					
		If yes, describe under SPECIAL PROVISIONS below					
		<input type="checkbox"/> Y <input type="checkbox"/> N				E.L. EACH ACCIDENT	\$
						E.L. DISEASE - EA EMPLOYEE	\$
						E.L. DISEASE - POLICY LIMIT	\$
		<b>OTHER Prof. Liab.</b>				Per Claim	\$2,000,000
						Aggregate	\$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

Re: Project #70.37000.09

## CERTIFICATE HOLDER

City of Ft. Lauderdale  
 100 N. Andrews Avenue  
 Suite 619  
 Ft. Lauderdale, FL 33301

## 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  
 Joshua Howell/NOYOLA

ACORD 25 (2009/01)  
INS025 (200901)

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/19/2010

**PRODUCER**  
MARSH  
600 RENAISSANCE CENTER, SUITE 2100  
DETROIT, MI 48243  
Attn: Annie Garvey ann.k.garvey@marsh.com (313)393-6565

**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.**

013807-MM-R-WC-10-11

**INSURED**  
Hellmuth, Obata & Kassabaum, L.P.  
2800 Post Oak Blvd.  
Suite 3700  
Houston, TX 77056

INSURERS AFFORDING COVERAGE	NAIC #
INSURER A: New Hampshire Insurance Company	23841
INSURER B: National Union Fire Ins Co Pittsburgh PA	19445
INSURER C:	
INSURER D:	
INSURER E:	

**COVERAGES**

1

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
	<b>GENERAL LIABILITY</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR  GENERAL AGGREGATE LIMIT APPLIES PER <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC				EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES(Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPI/OP AGG
	<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				COMBINED SINGLE LIMIT (Ea accident) \$ 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>EXCESS / UMBRELLA LIABILITY</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE  <input type="checkbox"/> DEDUCTIBLE <input type="checkbox"/> RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>	2921137 (AOS)	03/01/2010	03/01/2011	X WC STATU-TORY LIMITS   OTH-ER
B	ANY PROPRIETOR/PARTNER/EXECUTIVE Y/N OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> N  (Mandatory in NH) If yes, describe under SPECIAL PROVISIONS below	2921138 (CA)	03/01/2010	03/01/2011	E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
	<b>OTHER</b>				

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS**  
Workers' Compensation does not apply to monopolistic states (ND, OH, WA, & WY), Puerto Rico, or the Virgin Islands.

**CERTIFICATE HOLDER**

CHI-002994394-01

**CANCELLATION**

City of Fort Lauderdale  
100 N. Andrews Ave.  
#619  
Fort Lauderdale, FL 33301

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  
of Marsh USA Inc.  
John C Hurley



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.

Comment [d1]: Were these General Conditions part of an ITB/RFP? If so, did the ITB/RFP reference any modifications to the General Conditions?

Comment [d2]: Is there a copy of the ITB to review?



**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 to the extent caused by any negligent act, error or omission in 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.



### PART III - SPECIAL CONDITIONS

01. GENERAL CONDITIONS

RFP General Conditions Form G-107 Rev. 07/07 (GC) are included and made a part of this RFP.

Comment [j1]: I have not seen the General Conditions

02. VARIANCES

While the City allows Contractors to take variances to the RFP terms, conditions, and specifications, the number and extent of variances taken will be considered in determining proposal responsiveness and in allocating proposal evaluation points. See Section 1.06 of GC.

03. PUBLIC ENTITY CRIMES

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

04. NEWS RELEASES/PUBLICITY

News releases, publicity releases, or advertisements relating to this contract or the tasks or projects associated with the project shall not be made without prior City approval.

05. RFP DOCUMENTS

The Contractor shall examine this RFP carefully. Ignorance of the requirements will not relieve the Contractor from liability and obligations under the Contract.

06. PROPOSERS' COSTS

The City shall not be liable for any costs incurred by proposers in responding to this RFP.

07. RULES AND PROPOSALS

The signer of the proposal must declare that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the principal proposer.



08. APPROVED EQUAL OR ALTERNATE PROPOSALS

The specifications contained in this RFP are to be used as a reference only and are not to be considered of a proprietary nature. These specifications represent a level of quality and features which are desired by the City of Fort Lauderdale. The City is receptive to any product or service which would be considered by qualified City personnel as an approved equal.

The proposer must state clearly in his proposal pages any variance to the specifications. If proposing an approved equal or alternate product, it will be the proposer's responsibility to provide adequate information in his proposal to enable the City to ensure that the proposal meets the required criteria. If adequate information is not submitted with the proposal, it may be rejected.

The City of Fort Lauderdale will be the sole judge in determining if the proposed alternate qualifies as approved equal. The City reserves the right to award to that proposal which will best serve the interest of the City as determined by the City. The City further reserves the right to waive minor variations to specifications and in the bidding process.

09. CONTRACT PERIOD

The initial contract term shall commence upon final execution of the contract by the City and shall expire upon the City's receipt, to the City's satisfaction, of the last project deliverable as described in Section 09 of Part IV below, and the City's payment therefore, but in no event longer than one year from the date of commencement.

In the event services are scheduled to end because of the expiration of this contract, the Contractor shall continue the service upon the request of the Director of Procurement Services. The extension period shall not extend for more than ninety (90) days beyond the expiration date of the existing contract. The Contractor shall be compensated for the service at the rate in effect when this extension clause invoked by the City.

10. INVOICES/PAYMENT

~~The City will accept invoices following the City's receipt, to the City's satisfaction, of each project deliverable as described in Section 09 of Part IV below, but no more frequently than once per month. Each invoice shall fully detail the time devoted to each deliverable during the billing period and the corresponding hourly rate. Payment will be made within thirty (30) days after receipt of an invoice acceptable to the City. If, at any time during the contract, the City shall not approve or accept the Contractor's work product, and agreement cannot be reached between the City and the Contractor to resolve the problem to the City's satisfaction, the City shall negotiate with the Contractor on a payment for the work completed and usable to the City. This negotiated payment shall be based on the overall task or project breakdown, relative to the projected number of hours for each task element, and the percentage of work completed.~~

Comment [j2]: Invoicing must be monthly and not conditioned upon the receipt of Deliverables.

11. EXPENSES

The Contractor's fee includes all expenses.

12. NO EXCLUSIVE CONTRACT/ADDITIONAL SERVICES

Contractor agrees and understands that the contract shall not be construed as an exclusive



arrangement and further agrees that the City may, at any time, secure similar or identical services at its sole option.

While this contract is for services provided to the department referenced in this Request for Proposals, the City may require similar work for other City departments. Contractor agrees to take on such work unless such work would not be considered reasonable or become an undue burden to the Contractor.

#### 13. DELETION OR MODIFICATION OF SERVICES

The City reserves the right to delete any portion of this Contract at any time without cause, and if such right is exercised by the City, the total fee shall be reduced in the same ratio as the estimated cost of the work deleted bears to the estimated cost of the work originally planned. If work has already been accomplished on the portion of the Contract to be deleted, the Contractor shall be paid for the deleted portion on the basis of the estimated percentage of completion of such portion.

If the Contractor and the City agree on modifications or revisions to the task elements, after the City has approved work to begin on a particular task or project, and a budget has been established for that task or project, the Contractor will submit a revised budget to the City for approval prior to proceeding with the work.

#### 14. ADDITIONAL ITEMS

The City may require additional items of a similar nature, but not specifically listed in the contract. The Contractor agrees to provide such items, and shall provide the City prices on such additional items based upon a formula or method which is the same or similar to that used in establishing the prices in his proposal. If the price(s) offered are not acceptable to the City, and the situation cannot be resolved to the satisfaction of the City, the City reserves the right to procure those items from other vendors, or to cancel the contract upon giving the Contractor thirty (30) days written notice.

#### 15. WARRANTIES OF USAGE

Any estimated quantities listed are for information and tabulation purposes only. No warranty or guarantee of quantities needed is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.

#### 16. SUBSTITUTION OF PERSONNEL

It is the intention of the City that the Contractor's personnel proposed for the contract will be available for the initial contract term. In the event the Contractor wishes to substitute personnel, he shall propose personnel of equal or higher qualifications and all replacement personnel are subject to City approval. In the event substitute personnel are not satisfactory to the City and the matter cannot be resolved to the satisfaction of the City, the City reserves the right to cancel the Contract for cause. See Section 5.09 General Conditions.

#### 17. INDEPENDENT CONTRACTOR

The Contractor is an independent contractor under this Agreement. Personal services provided by the Contractor 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, purchasing policies and other similar administrative procedures applicable to services rendered under this Contract shall be those of the Contractor.

18. UNCONTROLLABLE CIRCUMSTANCES ("Force Majeure")

The City and Contractor will be excused from the performance of their respective obligations under this agreement when and to the extent that their performance is delayed or prevented by any circumstances beyond their control including, fire, flood, explosion, strikes or other labor disputes, act of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

- A. the non performing party gives the other party prompt written notice describing the particulars of the Force Majeure including, but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;
- B. the excuse of performance is of no greater scope and of no longer duration than is required by the Force Majeure;
- C. no obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and
- D. the non performing party uses its best efforts to remedy its inability to perform.

Notwithstanding the above, performance shall not be excused under this Section for a period in excess of two (2) months, provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the Contractor will not constitute Force Majeure. The term of the agreement shall be extended by a period equal to that during which either party's performance is suspended under this Section.

19. INSURANCE

The contractor shall furnish proof of Workers' Compensation Insurance, General Liability Insurance and Comprehensive Automobile Liability Insurance. The coverage is to remain in force at all times during the contract period. The following minimum insurance coverage is required. **The City is to be named as "additionally insured" with relation to General Liability Insurance. This MUST be written in the description section of the insurance certificate, even if you have a check-off box on your insurance certificate.** Any costs for adding the City as "additional insured" will be at the contractor's expense.

**Workers' Compensation and Employers' Liability Insurance**

Limits: Workers' Compensation – Per Florida Statute 440  
Employers' Liability - \$500,000



Any firm performing work on behalf of the City of Fort Lauderdale must provide Workers' Compensation insurance. Exceptions and exemptions can only be made if they are in accordance with Florida Statute. For additional information contact the Department of Financial Services, Workers' Compensation Division at (850) 413-1601 or on the web at [www.fldfs.com](http://www.fldfs.com).

### Commercial General Liability Insurance

Covering premises-operations, products-completed operations, independent contractors and contractual liability.

Limits: Combined single limit bodily injury/property damage \$1,000,000.

This coverage must include:

- a. Coverage for the liability assumed by the contractor under the indemnity provision of the contract.

### Automobile Liability Insurance

Covering all owned, hired and non-owned automobile equipment.

Limits: Bodily injury           \$250,000 each person  
  \$500,000 each occurrence

Property damage           \$100,000 each occurrence

### Professional Liability (Errors & Omissions)

Consultants

Limits: \$1,000,000 per ~~occurrence-claim~~ \$2,000,000 aggregate ~~with defense costs in addition to limits~~.

A copy of **ANY** current Certificate of Insurance should be included with your proposal.

In the event that you are the successful bidder, you will be required to provide a certificate naming the City as an "additional insured" for General Liability in the description box on the certificate of insurance.

Certificate holder should be addressed as follows:

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



20. LOBBYING ACTIVITIES

ALL BIDDERS/PROPOSERS PLEASE NOTE: Any bidder or proposer submitting a response to this solicitation must comply, if applicable, with City of Fort Lauderdale Ordinance No. C-00-27, Lobbying Activities. Copies of Ordinance No. C-00-27 may be obtained from the City Clerk's Office on the 7th Floor of City Hall, 100 N. Andrews Avenue, Fort Lauderdale, Florida. The ordinance may also be viewed on the City's website at <http://www.fortlauderdale.gov/clerk/LobbyistDocs/lobbyistord1009.pdf>.

21. TRANSACTION FEES:

The City of Fort Lauderdale uses BidSync ([www.bidsync.com](http://www.bidsync.com)) to distribute and receive bids and proposals. There is no charge to vendors/contractors to register and participate in the solicitation, nor will any fees be charged to the awarded vendor. Refer to [www.bidsync.com](http://www.bidsync.com) for further information.

22. SERVICE TEST PERIOD

If the Contractor has not previously performed the services to the city, the City reserves the right to require a test period to determine if the Contractor can perform in accordance with the requirements of the contract, and to the City's satisfaction. Such test period may be from thirty to ninety days, and will be conducted under all specifications, terms and conditions contained in the contract.

A performance evaluation will be conducted prior to the end of the test period and that evaluation will be the basis for the City's decision to continue with the Contractor or to select another Contractor.

23. SUB-CONTRACTING:

If the Contractor proposes to use subcontractors in the course of providing these services to the City, this information shall be a part of the RFP response. Such information shall be subject to review, acceptance and approval of the City, prior to any contract award. The City reserves the right to approve or disapprove of any subcontractor candidate in its best interest.

Contractor shall ~~ensure-see that~~ that all of Contractor's subcontractors perform in accordance with the terms and conditions of this Contract. Contractor shall be fully responsible for all of Contractor's subcontractors' performance, and liable for any of Contractor's subcontractors' non-performance and all of Contractor's subcontractors' acts and omissions as if they were the acts and omissions of the Contractor. ~~In addition to other indemnification provisions contained in this contract, Contractor shall defend at Contractor's expense, counsel being subject to the City's approval or disapproval, and indemnify and hold harmless the City and the City's officers, employees and agents from and against any claim, lawsuit, third party action, settlement, or judgment, including any award of attorney fees and any award of costs, by or in favor of any of Contractor's subcontractors for payment for work performed for the City by any of such subcontractors, and from and against any claim, lawsuit, third party action, settlement, or judgment, including any award of attorney fees and any award of costs, occasioned by or arising out of any act or omission by any of Contractor's subcontractors~~



24. CONTRACT COORDINATOR

The City will designate a Contract Coordinator whose principal duties shall be :

- Liaison with Contractor.
- Coordinate and approve all work under the contract.
- Resolve any disputes.
- Assure consistency and quality of Contractor's performance.
- Schedule and conduct Contractor performance evaluations and document findings.
- Review and approve for payment all invoices for work performed or items delivered.

25. CONTRACTOR PERFORMANCE REVIEWS AND RATINGS

The City Contract Coordinator shall develop a Contractor performance evaluation report. This report shall be used to periodically review and rate the Contractor's performance under the contract with performance rating as follows:

Excellent	Far exceeds requirements.
Good	Exceeds requirements
Fair	Just meets requirements.
Poor	Does not meet all requirements and Contractor is subject to penalty provisions under the contact.
Non compliance	Either continued poor performance after notice or a performance level that does not meet a significant portion of the requirements. This rating makes the Contractor subject to the default or cancellation for cause provisions of the contract.

The report shall also list all discrepancies found during the review period. The Contractor shall be provided with a copy of the report, and may respond in writing if he takes exception to the report or wishes to comment on the report. Contractor performance reviews and subsequent reports will be used in determining the suitability of contract extension.

26. BID TABULATIONS/INTENT TO AWARD

Notice of Intent to Award Contract/Bid, resulting from the City's Formal solicitation process, requiring City Commission action, may be found at [http://www.fortlauderdale.gov/purchasing/notices\\_of\\_intent.htm](http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm). Tabulations of receipt of those parties responding to a formal solicitation may be found at <http://www.fortlauderdale.gov/purchasing/bidresults.htm>, or any interested party may call the Procurement Office at 954-828-5933.



# FIRM PROFILES



## HOK

HOK is a global provider of design services for the built environment. Since our founding in 1955, HOK has grown into a firm of over 1,800 employees linked across a global network of office locations. We manage the planning, design, and construction process for all types of projects in every part of the world.

There are 23 HOK offices, located in: Atlanta, Beijing, Calgary, Chicago, Dallas, Denver, Dubai, Hong Kong, Houston, London, Los Angeles, Miami, Mumbai, New York, Ottawa, San Francisco, Shanghai, Singapore, St. Louis, Tampa, Toronto, Vancouver and Washington, D.C. HOK helps clients with all their facility needs through the entire building life cycle, from strategic planning through design, delivery, and ongoing management. Our professionals provide a range of integrated or stand-alone services including:

- Advance Strategies
- Architecture
- Construction Services
- Engineering
- Interiors
- Planning
- Project Management
- Visual Communications



HOK Advance Strategies works with clients to align their business strategies with their real estate, facilities, workplaces and information systems to effectively master change. We help our clients make value-based decisions that achieve clear, quantifiable results.

Our practice extends the reach of traditional architecture services by focusing on the needs of clients over the entire lifecycle of buildings. We help to develop and implement strategies, design and implement solutions, and manage and operate facilities over time. Our value proposition is this end-to-end service, maximizing your portfolio, facilities, and workplaces.

HOK Advance Strategies is a multidisciplinary group of thought leaders, analysts, strategists, listeners, planners, researchers, communicators and change agents who use our knowledge and experience to help organizations navigate through complex business challenges.

We are experienced in every aspect of planning for and advising on the deployment of business and organizational strategy, change management, facilities planning, workplace solutions, real estate strategy, financial analysis, web-based tools, database development and IWMS/CAFM applications.

## CORE SERVICES

- Real Estate Strategy
- Facility Planning
- Workplace Solutions
- Onsite Services
- Technology Application Services
- Sustainability Consulting
- Change Management



## FIRM PROFILES

(CONTINUED)

### MAD 4 MARKETING

Established in 1992, Mad 4 Marketing is an experienced Florida agency with a history of providing clients with exceptional services. We offer a complete menu of resources from branding and positioning; direct, guerilla, ambient and interactive marketing; media planning, negotiating, and buying; point-of-purchase displays; point-of-sale materials; and public relations. Mad 4 Marketing provides businesses with stronger identities that win customers and build loyalty. Christine Madsen, president and owner, is a long-time resident of Broward County who has been recognized for outstanding service to the community on numerous occasions. The company is comprised of 12 full-time employees. In addition to being listed as one of the INC 5000, it has recently taken its place on these South Florida Business Journal honor rolls:

- Largest Woman-Owned Businesses
- Largest Advertising Agencies

Our experience in the public sector includes providing comprehensive branding, strategic planning, creative conceptualization and development, media buying and placement, interactive and social media, and full marketing and community relations services to organizations such as the Fort Lauderdale-Hollywood International Airport, Port Everglades, Broward Cultural Division, Broward Center for the Performing Arts, Naples Airport, Broward Health, Broward College, and the Florida Department of Transportation including Florida's Turnpike, South Florida Commuter Services, and Broward County Transit.

Mad 4 Marketing also boasts solid experience with clients from the private sector including such companies as Warner Bros. Publications, Norwegian Cruise Line, South Florida Business Journal, Baptist Health South Florida, Regent Bank, Bank of Florida, USA Parking, Seminole Coconut Creek Casino, The Altman Company, Stiles Corporation, Elcon Electric Incorporated, Lucent Technologies, Ulysse Nardin and The Greater Fort Lauderdale Chamber of Commerce.

### THE TARA GROUP

Wakeling Inc. d/b/a Tara Group is certified, woman-owned small business and is a research consultancy and contractor for both private and public sector clients, located in Fort Lauderdale, Florida. Linda Flynn, President of Tara Group, has provided research services to clients since 2000. She utilizes many different qualitative and quantitative research methodologies depending on the scope of the project and is versed in comprehensive community outreach design. The Tara Group recently partnered with a national planning group to develop a 10-year arts and culture plan for Broward County. This project involved comprehensive community outreach including public forums, town halls, community and organizational surveys, and nontraditional outreach techniques.



## FIRM PROFILES

(CONTINUED)

### **FAITHFUL+GOULD**

Faithful+Gould is an international construction cost and project management consultant, operating since 1947. Our brand was created by the joining of forces of two leading service providers - Hanscomb and Faithful & Gould - to create one of the world's leading total solutions providers for the built environment. Faithful+Gould maintains over 600 personnel in 19 offices in cities throughout the continental United States and Puerto Rico. Worldwide we employ over 2,200 staff and service our clients on nearly every continent.

The Faithful+Gould team works as a single integrated unit to oversee a construction project from conception through start-up and operation. We also provide individual project management support services during any phase of project development. Major clients include: U.S. General Services Administration; BP; Amgen Pharmaceuticals; Marriott International; Continental Airlines; ExxonMobil; State of Tennessee; BMW and General Mills. We have been providing support services to private and public sectors on a responsive basis for more than 60 years. The major portion of our business is valued long-term relationships with repeat clientele.

# FIT™: Fully Integrated Thinking

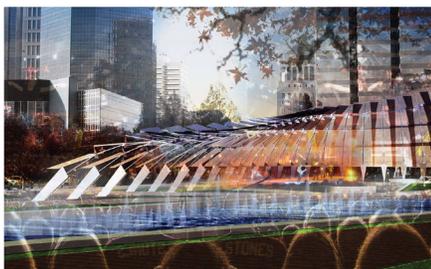


## FIT™: A LIVING SYSTEMS THINKING TOOL

There are **30 million species on our planet that have learned to live sustainably** in earth's operating conditions over the last 3.8 billion years by evolving to 'fit' into place, becoming progressively better adapted over time. In contrast, the environmental issues and resource scarcity making global headlines today suggest that human designs have proven to be mal-adapted for survival within these operating conditions.



One of the major challenges we humans face in achieving sustainability goals is a general **lack of an integrated and holistic systems approach**. Most measurement tools or quality standards currently do not account for the multifaceted nature of systems. The rest of the 30 million species, on the other hand, are acutely aware of the biotic and abiotic systems that surround them and they are constantly adjusting in response to these systems. Using Biomimicry as a design ethos for sustainability, we can learn from nature how to be better adapted to the planet.



FIT, as a process, is a way of viewing our design challenges as opportunities for better and more life-friendly integration. FIT, as a tool, **aligns and interconnects currently disparate systems and decision-making processes**. It provides the framework through which interdisciplinary goals can be set, measured, documented and adjusted over time.

## HOW FIT WORKS:

FIT is rooted in achieving the widely accepted measure of societal success known as the **triple bottom line: social, economic and environmental**. The FIT process establishes the framework to organize, map and assign the site-specific systems, living

and human, that comprise the triple bottom line. At this basic organizational level, FIT provides a mechanism for interaction and intervention in and among the systems, fostering better integration and accounting of resources. This in turn yields a more robust and meaningful definition of goals and achievements specific to the place. In short, FIT makes tangible the oftentimes vague and lofty triple bottom line rhetoric.

Beyond the organizational framework, FIT is a **life-based design tool** that incorporates the evolutionarily successful characteristics of all living organisms, which can be summarized by a set of 6 Life's Principles. While the FIT framework provides the lenses through which we can holistically conceptualize, set goals and establish performance standards that can be measured and communicated, Life's Principles provides insights into how we can make these systems more functional, based on the strategies that our planet-mates use to be well-adapted. **Life's Principles allows us to view our designs as part of a complex adaptive system that must function** within the natural genius of each specific place.

FIT is a process and a tool that can be applied to projects and organizations of any scale.

1. Meet with client to gain better understanding of needs and goals to establish the set of lenses through which a project, organization or plan can view it's unique triple bottom line opportunities.
2. Illustrate, through mapping and visual graphics, all of the critical natural and manmade systems that make up these lenses.
3. Hold a charrette to foster integrated and place-based discussion, analysis

# FIT™

(CONTINUED)

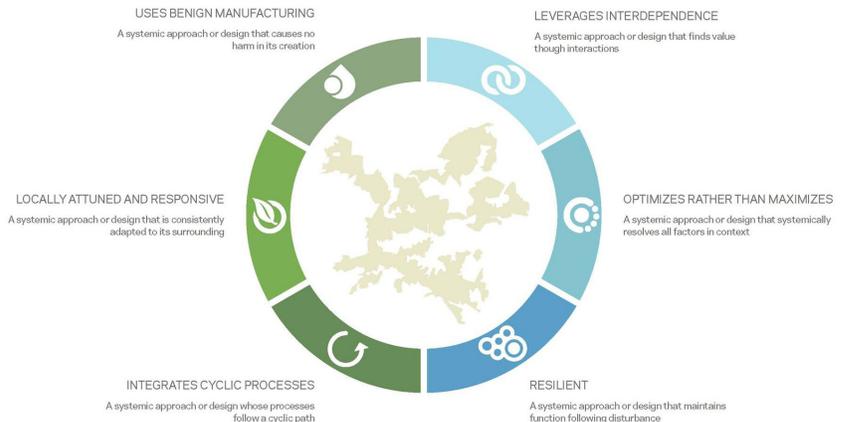


- and goal setting to determine the best course of action.
- Use Life's Principles checklist to discover and document latent potential of place, ecological services available, potential partners, opportunities for new industries, site selection, visioning
  - Identify and prioritize opportunities
  - Establish benchmarks for achievement based on existing standards or site specific needs
  - Establish monitoring mechanisms
  - Utilize the framework to revisit the project and the process so that further opportunities can be identified and feedback loops kept intact

Future opportunities of FIT are wide ranging. The process/tool is ideal for a web-based, interactive format that can be utilized by governing entities to manage and organize site data and streamline inter-departmental activities. Additionally, subscribers could access case studies and precedent examples of Life's Principles design strategies that can inform specific designs and outcomes.

- FIT is scalable - you can apply the process to an idea, an organization, a site design, a city or even a national agenda.
- FIT breaks barriers - the organizational framework of FIT is based in the natural systems of the place effectively erasing municipal and jurisdictional boundaries.
- FIT is place based - the FIT process reveals the inherent genius of the place and provides the opportunity to better leverage existing resources
- FIT is a structure - you can set measurable benchmarks to demonstrate how your mission is being accomplished.
- FIT is plug-and-play - you can use the genius of the place to set your own site-specific benchmarks, or you can plug in pre-determined standards (LEED, ICLEI) appropriate to your endeavor.
- FIT is flexible -
- FIT finds mutualisms -
- FIT sets a vision ...

### THE BENEFITS OF FIT:





# CITY OF FORT LAUDERDALE CONSULTING SERVICES FOR VISIONING PROJECT

REQUEST FOR PROPOSAL  
OCTOBER 20, 2010

