

## EXHIBIT B

### CONTRACT, LEASE, AGREEMENT CONTROL FORM

Date: 8/22/12

Contract/Lease Control #: C09-1775-ACAO

Bid #: BCC 36-09

Contract/Lease Type: AGREEMENT

Award To/Lessee: THE ADVOCACY GROUP

Lessor/Owner: OKALOOSA COUNTY

Effective Date: 12/17/2009

Cost <sup>#</sup> 36,480 ANNUALLY

BCC approved 490  
reduction.  
Ja

Expiration Date: 9/30/2013

Description of Contract/Lease: FLORIDA LOBBYIST SERVICES

Department Manager: ACAO

Department Monitor: Sandra Launch

Monitor's Telephone #: 689-5007

Monitor's FAX # OR E-Mail: SLaunch@CO.OKALOOSA.FL.US

Date Closed: \_\_\_\_\_

Cc: Finance Dept Contracts & Grants Division



# Board of County Commissioners

State of Florida

August 7, 2012

sub @ CALDENASPARTNERS.COM

The Advocacy Group  
Slater Bayliss  
215 S. Monroe St.  
Tallahassee FL 32301

**CONTRACT # C09-1775-ACAO  
THE ADVOCACY GROUP  
FLORIDA LOBBYIST SERVICES  
EXPIRES: 09/30/2013**

Dear Mr. Bayliss:

The Okaloosa County Board of County Commissioners voted in today's Board Meeting to offer to renew your contract (C09-1775-ACAO)) for one year (Oct 2012 – Sep 2013) conditional on you accepting a 4% decrease in your annual contract rate.

Current Annual Rate:	\$38,000.00
	- <u>1,520.00</u>
	<b>\$36,480.00</b>

Please confirm if you are agreeable to the above (e-mail is acceptable).

Sincerely,

Richard L. Brannon, CPPB, FCCM  
Purchasing Director  
602-C North Pearl St.  
Crestview FL 32536  
850-689-5960  
[rbrannon@co.okaloosa.fl.us](mailto:rbrannon@co.okaloosa.fl.us)

- BCC-North 302 N. Wilson St., Suite 302 Crestview, FL 32536 (850) 689-5030 FAX (850)689-5059
- BCC-South 1084 Lewis Turner Blvd., Suite 100 Fort Walton Beach, FL 32547 (850) 651-7105
- Courthouse 101 East James Lee Blvd. Crestview, FL 32536 (850) 689-5000

## Richard Brannon

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**From:** Slater Bayliss [swb@cardenaspartners.com]  
**Sent:** Wednesday, August 15, 2012 12:57 PM  
**To:** Richard Brannon  
**Cc:** Jim Curry; Jack Allen  
**Subject:** RE: contract renewal

Richard- I apologize for my delayed response. With the primary elections behind us, I am finally making my way through Monday and Tuesday's email today.

We recognize these are very tough economic times. We also sincerely enjoy our relationship with the County. Therefore, you can count on us to enthusiastically continue the same level of commitment at the reduced rate approved by the Commission.

It is an honor to represent the Okaloosa County Commission and to work with County's fine staff. Thank you for your confidence.

Sincerely,

Slater

Slater W. Bayliss  
The Advocacy Group  
at Cardenas Partners  
215 South Monroe Street, Suite 602  
Tallahassee, FL 32301  
850.222.8900  
[www.CardenasPartners.com](http://www.CardenasPartners.com)

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**From:** Richard Brannon [<mailto:rbrannon@co.okaloosa.fl.us>]  
**Sent:** Wednesday, August 15, 2012 1:15 PM  
**To:** Slater Bayliss  
**Cc:** Jim Curry; Jack Allen  
**Subject:** FW: contract renewal

Mr. Bayliss,

As mentioned in the previous email, the Okaloosa County Board of County Commissioners is asking for a 4% discount to your annual contract. County Departments were asked to include the same reduction in their budget preparation. I have been instructed to rebid for this service unless you are willing to accept the discount.

Please respond directly to me with your decision. If I do not hear from you by August 20, 2012, the Board has directed me to rebid for the services.

Richard Brannon CPPB FCCM  
Purchasing Director  
Okaloosa County Board of County Commissioners  
602 C North Pearl Street

Crestview, Florida 32536  
850-689-5960  
[rbrannon@co.okaloosa.fl.us](mailto:rbrannon@co.okaloosa.fl.us)

"Please note: Due to Florida's very broad public records laws, most written communications to or from County employees regarding County business are public records, available to the public and media upon request. Therefore, this written e-mail communication, including your e-mail address, may be subject to public disclosure."

**From:** Richard Brannon  
**Sent:** Tuesday, August 14, 2012 9:57 AM  
**To:** 'swb@cardenaspartners.com'  
**Cc:** Jack Allen; Sandra Launch  
**Subject:** contract renewal

Mr. Bayliss,

I have been asked to follow up with you to confirm receipt of our letter concerning renewal of you current contract with Okaloosa County. In the letter we requested a 4% reduction in the annual fee. Just trying to confirm your agreement.

Richard Brannon CPPB FCCM  
Purchasing Director  
Okaloosa County Board of County Commissioners  
602 C North Pearl Street  
Crestview, Florida 32536  
850-689-5960  
[rbrannon@co.okaloosa.fl.us](mailto:rbrannon@co.okaloosa.fl.us)

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## Jack Allen

---

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**Cc:** Jim Curry; Jack Allen  
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Richard Brannon CPPB FCCM  
Purchasing Director  
Okaloosa County Board of County Commissioners  
602 C North Pearl Street  
Crestview, Florida 32536  
850-689-5960  
[rbrannon@co.okaloosa.fl.us](mailto:rbrannon@co.okaloosa.fl.us)

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Richard Brannon CPPB FCCM  
Purchasing Director  
Okaloosa County Board of County Commissioners  
602 C North Pearl Street  
Crestview, Florida 32536  
850-689-5960  
[rbrannon@co.okaloosa.fl.us](mailto:rbrannon@co.okaloosa.fl.us)

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*Jack Allen, CPPB*  
*Purchasing Services Manager*  
*Okaloosa County, FL*  
*850-689-5960*  
*[jallen@co.okaloosa](mailto:jallen@co.okaloosa)*

**BOARD OF COUNTY COMMISSIONERS  
AGENDA REQUEST**

**DATE:** August 7, 2012

**TO:** Honorable Chairman & Members of the Board

**FROM:** Richard Brannon, Purchasing Department

**SUBJECT:** Renewal of Financial Advisor & State Lobbyist Contracts

**DISTRICT:** All Board approved pending Contractors agree to a 4% reduction

\*\*\*\*\*

**REQUESTING DEPT:** Purchasing

**STATEMENT OF ISSUE:** Two contracts utilized by the Board expire on September 30, 2012. Guidance is requested for renewal. They are:

1. **Contract #C04-1098-BCC**  
First Southwest Company (Mark Galvin)  
20 N. Orange Ave, #1209  
Orlando FL 32801  
This contract provides Financial Advisory Services.  
Started: 08/20/2004  
May 4, 2010 reduced annual cost from \$24,000 to \$22,800.
  
2. **Contract #C09-1775-ACAO**  
The Advocacy Group (Slater Bayliss)  
215 S. Monroe St.  
Tallahassee FL 32301  
This contract provides State Lobbyist Services  
Started: 12/17/2009  
May 2010 reduced annual cost from \$40,000 to \$38,000.

**OPTIONS:** Renew or Cancel

**RECOMMENDATION:** This item was brought to the Board for guidance.

**RECOMMENDED BY:** Richard Brannon  
Purchasing Director

**REVIEWED BY:** Mark Galvin  
Human Resources Director

**APPROVED BY:** \_\_\_\_\_  
County Administrator

**RECOMMENDATION:** As stated above, this agreement was automatically renewed for one year, but is due to be renewed for another year effective August 2010. County staff has a good working relationship with this firm who is responsive to any action required by the County.

This amendment has been reviewed and approved by the County Attorney, Risk Management and Purchasing Department.

Staff recommends continuing this contract with First Southwest for at least another year (August 2010-August 2011), or as per the Board's direction.

**RECOMMENDED BY:** \_\_\_\_\_

*Donna B. Miller*

**Assistant County Administrator**

**APPROVED BY:** \_\_\_\_\_

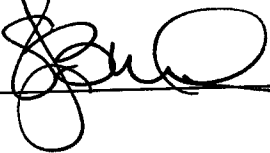
**County Administrator**

All notices required by this agreement shall be in writing to the representative listed above with a courtesy copy to the following:

Jack Allen  
Contracts & Leases  
Okaloosa County Purchasing Department  
602-C North Pearl Street  
Crestview, FL 32536  
850-689-5960 / 850-689-5998 (FAX)  
E-Mail: [jallen@co.okaloosa.fl.us](mailto:jallen@co.okaloosa.fl.us)

**IN WITNESS WHEREOF**, the Chairman of the Board of County Commissioners, by authority vested in him, has hereunto subscribed his name on behalf of the County of Okaloosa, Florida, the Owner, and the said **Contractor – The Advocacy Group representative** has hereto fixed his signature, the day and year above written.

WITNESS:

  
\_\_\_\_\_  
\_\_\_\_\_

CONTRACTOR

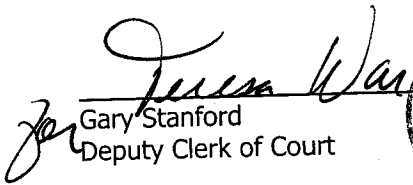
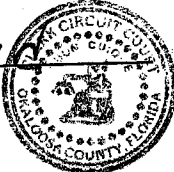
BY SLATER W. BAILIS

PARTNER  
TITLE

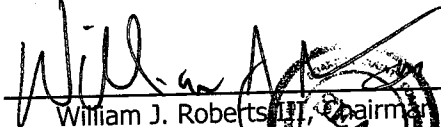

STATE OF FLORIDA  
COUNTY OF OKALOOSA

This contract is accepted this 17th day of December 2009 and is effective on the 17th day of December 2009.

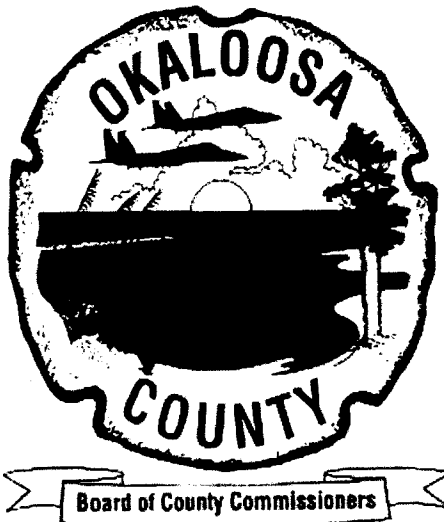
ATTEST:

  
Gary Stanford  
Deputy Clerk of Court  


COUNTY OF OKALOOSA, FLORIDA

BY   
William J. Roberts III, Chairman  






*ORIGINAL*

**Request for Proposal  
Lobbyist Services  
Proposal #: BCC 36-09**



**The Advocacy Group**

AT CARDENAS PARTNERS LLC

**215 South Monroe Street, Suite 602  
Tallahassee, Florida 32301  
Office: 850.222.8900  
Fax: 850.841.7653**

**Contact:  
Slater Bayliss  
Contact Email:  
[SWB@CardenasPartners.com](mailto:SWB@CardenasPartners.com)**

**September 18, 2009**

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## Letter of Interest

September 18, 2009

The Honorable Bill Roberts  
Chairman  
Okaloosa County Board of County Commissioners  
602-C North Pearl Street  
Crestview, FL 32536

Dear Chairman Roberts:

On behalf of The Advocacy Group at Cardenas Partners LLC (TAG), we thank you for the opportunity to respond to Okaloosa County's (the County) Request for Information with regard to State Governmental Services. The Advocacy Group at Cardenas Partners LLC is politically and geographically qualified to represent the County. We have the capacity to effectively advocate on the County's behalf and with offices in Tallahassee, Miami and Washington, D.C., our professionals are organically in place in their respective communities. This enables us to have personal and professional relationships with Agency heads and staffs well as multiple legislative delegations across the state. We pride ourselves on having the collective experience and track record to effectively monitor, identify and prioritize opportunities and challenges for our public and private sector clients.

Our Tallahassee office will serve as the lead office for this matter and members of our Firm have regular and direct interaction on a variety of public policy and political matters with elected officials, appointed officials and employees of the Executive and Legislative branches. We have a great deal of experience working with organizations, government agencies and municipalities to analyze options, develop and further a comprehensive legislative agenda and acquire increased state assistance, including targeting legislative appropriations that may impact our clients. We believe our experience, political network, effective communication skills and capacity, along with our positive track record on behalf of similar public sector clients, demonstrate that our competent and responsible counsel to the County will lead to a successful relationship.

We at The Advocacy Group at Cardenas Partners LLC look forward to discussing the possibility of serving Okaloosa County's needs.

Sincerely,



Al Cardenas  
Senior Partner

## **Business Credentials**

The Advocacy Group at Cardenas Partners has a great deal of experience advocating on behalf of clients representing a broad array of interests, including blue chip Fortune 100 & 500 companies, statewide trade associations as well as select municipalities and counties.

We pride ourselves on having the collective experience and track record to effectively monitor, identify and prioritize opportunities and challenges for our public and private sector clients. Using 2009 as an example, there were 2,369 bills filed and a budget of 408 pages in the state of Florida. This creates a substantial amount of information to analyze. With an experienced team of professionals available to work on this account, we are able to effectively process this information and analyze the practical implications for our clients.

TAG is well positioned to actively and continually lobby the Florida Legislature and the Executive Branch to assist our clients in several areas including, but not limited to: assisting in the development and pursuit of a legislative program, representing clients in meetings related to legislative and governmental issues, shepherding applications through any state permitting process and assisting in drafting and executing an overall grassroots campaign. Our Firm has the necessary expertise to assist with a broad array of policy and political issues.

TAG's practice is built on a strong foundation of core budgeting and legislative process skills that allows us to successfully navigate issues of interest to Okaloosa County. We pride ourselves on having personal and professional relationships with the appropriate elected, appointed and staff level decision-makers, as well as having the ability to analyze, strategically and tactically, the subject matter we are advocating. This approach, an understanding of ever-changing political undercurrents, our understanding of the political and policy components of issues and our strong relationships, are what distinguishes our advocacy practice from our peers.

In addition to providing expert advice and legislative counsel, TAG envisions our role as more than a consultant, we see ourselves as adjunct "staff" to our clients. An effective governmental advocate can serve an extremely useful purpose by identifying opportunities for initiatives and in coordinating the development of an effective lobbying and grassroots strategy to best represent your interests in Tallahassee and around the state. We have been privileged to work closely with House and Senate leadership, key legislative committee chairs, the Governor's staff, and agency heads alike.

Our approach combines the art of identifying issues of relevance to our clients and communicating their impacts in a clear and concise manner, incorporating political and policy components and often times utilizing relationships that have been built over time and are based on trust and political allegiances to find ways to make the implications of these issues as palatable as possible for the client.

TAG currently maintains a staff consisting of eight (8) highly motivated and experienced professionals. Collectively we will designate a lead to serve as liaison for, and primary contact with, Okaloosa County. The County can be assured that all resources of TAG will be utilized to meet the priorities of the County.

TAG maintains a selective client base in order to maximize resources and successful outcomes. The personnel assigned to this account will be experienced professionals who, by virtue of their political and advocacy experiences, offer an abundance of talent in achieving the priorities of Okaloosa County. The biographies contained in this RFP speak to the broad range of talent and resources TAG possesses.

TAG's team works smartly and efficiently to maximize their legislative, executive branch, agency and federal assets to the benefit of our clients. TAG brings unparalleled practical and professional advocacy and business acumen to bear on behalf of Okaloosa County. Al Cardenas, Senior Partner, brings a wealth of knowledge and relationships to assist in achieving the priorities of the County. Our Tallahassee based Advocacy Group includes Slater Bayliss, Stephen Shiver, Sarah Busk and Alli Liby-Schoonover. David Cardenas works from our Miami office and Colin Mueller and Carl Chidlow have a great deal of experience advocating on behalf of clients at the federal level.

Lastly, an indelible asset that our firm brings to its clients is a networking ability through our broad business, political and government contacts that we have individually and collectively built over time statewide and across the nation. These relationships have been established through political activities, fundraising efforts and statewide advocacy over a number of years. The diverse backgrounds and experiences of our personnel speak for themselves. However, we believe it goes without saying that our exposure to serving as personal and professional aides, colleagues and political advisors to some of the state and nation's most influential power brokers in government and business gives our clients a unique entrée into almost any realm of interest they seek. We are proud of our team and most importantly proud of those we are able to call on for assistance in meeting the needs of our clients.



**Al Cardenas**  
**Senior Partner, The Advocacy Group at Cardenas Partners**  
**1441 Brickell Ave, 15th Floor**  
**Miami, Florida 33131**  
305.539.2480 Miami Office  
[ac@tewlaw.com](mailto:ac@tewlaw.com)

Al Cardenas oversees the Governmental Affairs Practice in the Miami, Tallahassee and Washington, D.C. offices. Mr. Cardenas is a regular opinion editorial columnist for *El Diario*, the largest circulating Spanish-speaking newspaper in the country and has frequently appeared on network television, CNN, FOX, MSNBC, Univision, CNN Espanol and Telemundo.

In his distinguished career, Al Cardenas served two terms as Chairman of the Republican Party of Florida, the largest state political party in the country. Prior to his service as chairman, Mr. Cardenas served three consecutive terms as vice-chairman. He has four times been named as one of Washington, D.C.'s top lobbyists by *The Hill* newspaper. Mr. Cardenas has been active in Republican politics for more than 25 years and has represented the State of Florida at every Republican National Convention since 1976.

President-elect Ronald Reagan chose Mr. Cardenas for his transition team, making him responsible for the transition of the United States Department of Commerce. President Reagan also appointed him to chair the President's Commission on Small and Minority Business Affairs in 1982 and later as Special Ambassador to St. Kitts-Nevis upon that nation's independence in 1983.

President George H. W. Bush appointed Mr. Cardenas to the Board of Directors of the Federal National Mortgage Association from 1985 to 1990. He also served on the President's Trade Policy Commission.

Governor Jeb Bush appointed Al Cardenas as a member of the Board of Trustees to Florida Agricultural and Mechanical University (FAMU). He is also a national board member of the American Conservative Union and serves as a board member of the Beacon Council.



**Slater Bayliss**  
**Partner, The Advocacy Group at Cardenas Partners**  
**215 South Monroe Street, Suite 702**  
**Tallahassee, Florida 32301**  
850.222.8900 Tallahassee Office  
[swb@cardenaspartners.com](mailto:swb@cardenaspartners.com)

Slater Bayliss is a Partner in The Advocacy Group at Cardenas Partners. Mr. Bayliss has been involved in some of the Florida Legislature's largest and most contentious issues including economic development policy formation and funding, workers' compensation reform, health care policy formation and funding, transportation policy development and funding and the increasingly complex landscape associated with amending Florida's State Constitution.

Mr. Bayliss, a member of the Florida Association of Professional Lobbyists, has been a registered lobbyist in the State of Florida since 2003. He currently represents municipalities and counties, large and small businesses, private developers, health care companies, utilities, statewide associations and investment groups.

Mr. Bayliss previously served as Executive Director of "Floridians for Responsible Spending." The committee was successful in mounting Florida's first statewide campaign to repeal an initiative from Florida's State Constitution, resulting in saving the State's transportation budget an estimated 25 billion dollars.

Prior to working to running Floridians for Responsible Spending, Mr. Bayliss served in the Governor's Office of Tourism, Trade, and Economic Development (OTTED) as Director of Corporate Relations. He was responsible for working with corporate leaders to promote a competitive and productive business climate in Florida. Preceding his time at OTTED, he served as Director of Operations for Governor Bush's 2003 Inaugural Celebration. From December 2000 through November 2002, he served as personal assistant to Governor Bush. In this role, Mr. Bayliss acted as the liaison between Governor Bush and the executive office, agency secretaries, members of the Florida Legislature and constituents.

Prior to his tenure in the Governor's office, he served as Director of the Republican Party of Florida's Committee of 100, their highest donor level. He assisted with the logistical execution of Florida Victory 2000 events and RPOF major donor events. Bayliss also functioned as special assistant to the Convention Manager for the 2000 Republican National Convention in Philadelphia.

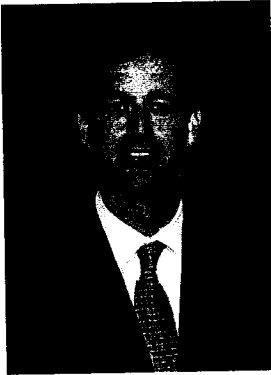
Mr. Bayliss was designated a Statewide Finance Chairman by the Charlie Crist for Governor Campaign and a founding patriot by the Charlie Crist for U.S. Senate campaign. Further, he enjoyed the designation of Bush-Cheney 2004 Maverick. Additionally, he serves on the Republican Party of Florida's Statewide Finance Committee and has raised monies for the Chris Evert Pro-Celebrity Tennis Classic, the U.S. Central Command Memorial Fund, Inc., and the Florida Hurricane Disaster Relief Fund. Bayliss has also served as Finance Director for the former Florida Speaker of the House and Florida State Senator, Daniel Webster.

Mr. Bayliss is a gubernatorial appointee to the Board of Directors of the Florida Sports Foundation and serves on the Florida Sports Charitable Foundation, Inc.

Mr. Bayliss began his political career with the Republican Governors' Association in 1996. He also worked on Jeb Bush's gubernatorial race in 1998 and the George W. Bush for President Iowa straw poll effort in 1999.

Bayliss received a bachelor's degree in political science and communications from the University of Iowa. He and his wife, Sara, reside in Tallahassee and are the proud parents of Brooks and Blair.





**Stephen W. Shiver, Jr.**  
**Partner, The Advocacy Group at Cardenas Partners**  
**215 South Monroe Street, Suite 702**  
**Tallahassee, Florida 32301**  
850.222.8900 Tallahassee Office  
[ss@cardenaspartners.com](mailto:ss@cardenaspartners.com)

Stephen Shiver has served directly and indirectly for numerous past and current members of the Florida Legislature, including many that are in leadership positions currently.

Shiver served former Republican Majority Leader and current Senate President Pro-Tempore Mike Fasano in the Florida House, where he assisted the Majority Leader and staff in communication and implementation of the majority party's agenda for the 2001 legislative session. In addition, he served as a floor assistant to Fasano and other members during the 2001 legislative session.

Mr. Shiver served former Speaker of the House Tom Feeney in the Florida House of Representatives as a legislative assistant and as Chief Executive Assistant. In this capacity he coordinated legislative briefings and meetings among industry lobbyists and staff as well as serving as a liaison for members of the House and Senate to the Speaker and was a legislative advisor to the Speaker on issues before the Legislature.

Shiver served as Executive Director of Political Affairs for the Republican Party of Florida (RPOF) during the 2004 election cycle. Mr. Shiver oversaw the political apparatus of the state party through the historically successful election cycle of 2004 in which President George W. Bush garnered close to 4 million votes statewide, former Housing and Urban Development Secretary Mel Martinez was elected to the United States Senate, every Florida GOP congressman and state senator up for re-election was re-elected, and a net gain of three seats was secured in the state house.

At the RPOF, he also served as Executive Director of Victory 2004 working closely with officials of the Republican National Committee and the Bush-Cheney 2004 campaign in implementing one of the largest volunteer campaign programs in the history of Florida politics.

Mr. Shiver previously worked with a Tallahassee-based governmental affairs and political consulting group, working with clients in the field of health care, education, telecommunications and business. In addition, the firm served as general campaign consultants to the RPOF as well as to state senate and state house candidates during the 2002 election cycle.

Mr. Shiver received a bachelor's degree in Business and English from Florida State University. He and his wife, Paige, reside in Tallahassee with their daughter Laurie.



**Colin Mueller**  
**Partner, Cardenas Partners LLC**  
**700 12th St NW, Suite 1150**  
**Washington, DC 20005**  
202.904.2020 Washington, D.C. Office  
[cmueller@cardenaspartnersdc.com](mailto:cmueller@cardenaspartnersdc.com)

Colin Mueller is a partner at Cardenas Partners LLC. Mr. Mueller represents clients on matters related to federal appropriations, transportation, economic development, healthcare, and government relations. He specializes in strategy development and implementation, securing Federal funding, and monitoring of Federal, state, and local legislation and activities.

Prior to joining Cardenas Partners, Mr. Mueller worked on both the legislative and political staff of Senator Bill Nelson of Florida for over five years. As Senator Nelson's Political and Finance Director, he was instrumental in implementing campaign strategy and raising over \$18 million dollars for the Senator's re-election campaign in 2006. As Legislative Assistant and Special Projects Coordinator Mr. Mueller worked on multiple issues dealing with commerce, defense, agriculture and Indian affairs; he worked closely with elected officials and representatives of Florida counties, cities, non-profit organizations, and state agencies. During this time, as Special Projects Coordinator, Mr. Mueller also organized business outreach meetings with industry leaders to discuss upcoming legislation and policy with Senator Nelson.

Before his tenure with Senator Bill Nelson, Mr. Mueller worked as an associate with a government relations firm, fundraising and implementing media and campaign strategy for a number of Senators and Congressmen including Senators Leahy, Landrieu, Levin and Congressman Maurice Hinchey.



**Carl Chidlow**  
**Partner, Cardenas Partners LLC**  
**700 12th St NW, Suite 1150**  
**Washington, DC 20005**  
202.904.2020 Washington, D.C. Office  
[cchidlow@cardenaspartnersdc.com](mailto:cchidlow@cardenaspartnersdc.com)

Carl Chidlow has been active in Democratic politics for nearly 20 years. From early 2006, through the 2008 Presidential election, Carl served as Finance Director for the Democratic National Committee (DNC). He oversaw the successful integration of the Obama for America and the DNC finance operations. Mr. Chidlow played a critical role during the Democratic National Convention in Denver through the planning and execution of an extensive donor maintenance program. The DNC broke all fundraising records for major donor operations during each year of his tenure.

Prior to joining the DNC, Mr. Chidlow served in many key campaigns over the past several election cycles. He has advised the campaigns, serving in senior roles, of Former Senate Democratic Leader Tom Daschle (SD) and Senator Patty Murray (WA). He served as the Deputy Finance Director for the John Kerry for President Campaign. Mr. Chidlow was the Finance Director for Senator Max Cleland (GA) in 2002 and the National Finance Director for Missouri Governor Mel Carnahan's Senate Campaign in 2000. During the 1998 election cycle, Mr. Chidlow served in several senior roles at the Democratic Senatorial Campaign Committee (DSCC).

During the 1990's, Mr. Chidlow assisted the campaigns of several senior U.S. House members including former Representatives Vic Fazio (CA), Bill Brewster (OK), and current House members Dale Kildee (MI) and Sander Levin (MI).

Mr. Chidlow attended Syracuse University, receiving a Bachelor of Arts in American Studies in 1991. He has served in the Army National Guard as an infantry soldier in both New York and Maryland. He lives with his wife and two children in Alexandria, Virginia.



**Sarah Busk**

**Government Affairs, The Advocacy Group at Cardenas Partners**  
**215 South Monroe Street, Suite 702**  
**Tallahassee, Florida 32301**  
850.222.8900 Tallahassee Office  
[sjb@cardenaspartners.com](mailto:sjb@cardenaspartners.com)

Sarah Busk most recently served as a Special Events Representative on the 2007 Florida Inaugural Committee, where she coordinated Governor Charlie Crist's swearing in ceremony. In this role, Sarah worked with the Department of Military Affairs, members of the Florida Cabinet, members of the Florida State Supreme Court and other state elected officials and agencies to successfully inaugurate Florida's 44th Governor.

Prior to her work on the 2007 Inaugural Committee, Sarah served as Deputy Finance Director for Senate President Tom Lee's statewide campaign for Florida's Chief Financial Officer. In this role Sarah was responsible for all day-to-day operations of the campaign's statewide headquarters, coordinating fundraising activities and major donor relations, oversight of all financial reporting to the Florida Department of State as well as serving as liaison between the Republican Party of Florida and the campaign.

Sarah began her political career as an Aide to the Chairman of the Republican Party of Florida (RPOF). In this capacity she served as liaison between national and state leaders as well as staff members to RPOF. After serving in this capacity for the 2004 election cycle, Sarah became the Donor Relations Coordinator for RPOF where she was responsible for the coordination of fundraising event logistics as well as fundraising accounting.

Sarah holds a Bachelor's Degree in Political Science from Florida State University, has completed RNC Campaign Finance College and was an Alternate Delegate to the 2004 Republican National Convention.

**David Cardenas**  
**Director of Research, The Advocacy Group at Cardenas Partners**  
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305.539.2480 Miami Office  
[DC@CardenasPartnersDC.com](mailto:DC@CardenasPartnersDC.com)

David Cardenas is based out of the Miami Office of Cardenas Partners LLC, and works closely with Tallahassee and Washington offices in matters pertaining to fundraising, advocacy strategy, and government consulting on a municipal, state, and federal level.

Prior to joining Cardenas Partners, David worked for two years with HSBC Private Bank International. As a member of the Southern Cone Team, he was part of a group that oversaw and managed more than \$1.5 billion dollars of client assets.

While in college, David worked for Victory 2004, the finance arm of the Bush for President Campaign. In addition, he worked in the office of Senator Mel Martinez in Washington D.C.

David graduated from Duke University with a Bachelor of Arts in Political Science and a Certificate in Latin American Studies. David attended graduate school at the University of Miami where he received a Master of Arts in International Administration.

**Alli Liby-Schoonover**  
**Policy Coordinator, The Advocacy Group at Cardenas Partners**  
**215 South Monroe Street, Suite 702**  
**Tallahassee, Florida 32301**  
850.222.8900 Tallahassee Office  
[als@cardenaspartners.com](mailto:als@cardenaspartners.com)

Alli Liby-Schoonover returns to Tallahassee after her time as a Corps Member of Teach For America, a national organization seeking to end educational inequity in America. She taught high school literature in inner-city West Philadelphia and graduated with a Master of Science in Education from the University of Pennsylvania. Her thesis explored the effect of teachers' unions on urban schools.

Prior to her time in Philadelphia, Mrs. Liby-Schoonover worked in legislative affairs for the Florida Department of Lottery. She was a member of a team whose major success was the passage and implementation of the bill to allow the Lottery to patent its products.

Her interest in the legislative process began while working for the Florida Student Association as a legislative assistant focused on furthering higher education policy initiatives for the students of Florida's eleven State Universities.

She received her bachelors degree in American Studies and Political Science from Florida State University. She resides in Tallahassee with her husband, Chris, and English Bulldog, Zoey.



September 15, 2009

The Honorable Bill Roberts  
Chairman  
Okaloosa County Board of County Commissioners  
602-C North Pearl Street  
Crestview, FL 32536

Dear Chairman Roberts:

I am pleased to confirm that Capital City Bank is the main depository for The Advocacy Group at Cardenas Partners LLC. We provide both depository and credit facilities and all accounts are handled as agreed. We value our relationship with these clients.

Please contact me if I can provide any additional information.

Sincerely,

A handwritten signature in cursive script that reads "William P. Smith, Jr." followed by a period.

William P. Smith, Jr.

Senior Vice President

Capital City Bank



## Registration

The Advocacy Group at Cardenas Partners LLC is a limited liability company, licensed to do business in the state of Florida. The professionals who will be assigned to this account are lobbyists, registered with the Legislative and Executive Branches of Florida Government.

Our primary office is located at 215 South Monroe Street, Suite 602, Tallahassee, FL 32301 and is open Monday – Friday from 8:00 am to 5:00 pm. However, each member of the team will be available to the County **at all times** as each member is equipped with state of the art technology (Blackberry, cell phones, web access, etc.) to timely address the County's needs.

Our Tallahassee office is within walking distance to the Capitol, situated just one block away from the legislative building with a parking garage connected to our building. The Advocacy Group at Cardenas Partners has two conference rooms, a fax machine, black/white and color copy machines, scanner, internet connection, desk top computer, phone capability, televisions with government channel access and separate office space within the suite to accommodate Okaloosa County elected officials and staff.

**Electronic Articles of Organization  
For  
Florida Limited Liability Company**

L09000057112  
FILED 8:00 AM  
June 12, 2009  
Sec. Of State  
shawkes

**Article I**

The name of the Limited Liability Company is:

THE ADVOCACY GROUP AT CARDENAS PARTNERS, LLC

**Article II**

The street address of the principal office of the Limited Liability Company is:

215 SOUTH MONROE STREET  
SUITE 702  
TALLAHASSEE, FL. 32301

The mailing address of the Limited Liability Company is:

215 SOUTH MONROE STREET  
SUITE 702  
TALLAHASSEE, FL. 32301

**Article III**

The purpose for which this Limited Liability Company is organized is:

ANY AND ALL LAWFUL BUSINESS.

**Article IV**

The name and Florida street address of the registered agent is:

WESLEY M ROBINSON  
80 SW 8TH STREET  
SUITE 3100  
MIAMI, FL. 33130

Having been named as registered agent and to accept service of process for the above stated limited liability company at the place designated in this certificate, I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relating to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

Registered Agent Signature: WESLEY M ROBINSON

## Article V

The name and address of managing members/managers are:

Title: MGR  
ALBERTO CARDENAS  
215 SOUTH MONROE STREET, SUITE 702  
TALLAHASSEE, FL. 32301

Title: MGR  
SLATER BAYLISS  
215 SOUTH MONROE STREET, SUITE 702  
TALLAHASSEE, FL. 32301

Title: MGR  
STEPHEN SHIVER  
215 SOUTH MONROE STREET, SUITE 702  
TALLAHASSEE, FL. 32301

Signature of member or an authorized representative of a member

Signature: WESLEY M ROBINSON

L09000057112  
FILED 8:00 AM  
June 12, 2009  
Sec. Of State  
shawkes



3

Account Number: 71162

THE ADVOCACY GROUP AT CARDENAS PA  
STE 602  
SARAH BUSK, GOVERNMENT AFFAIRS  
215 S MONROE ST  
TALLAHASSEE FL 32301-1804

**The Business Tax Certificate for tax year 2010 is attached below.**

**This certificate expires September 30th, 2010.**

Please detach and display in a prominent place at the business location.

To cancel a business account with the City of Tallahassee, please return this certificate with a letter identifying the final day of business.

To transfer ownership or location, please follow the instructions on the reverse side of the tax certificate.

Each April the "Declaration of Information Form" is mailed to all non-professional, commercial locations. This Declaration must be completed and returned prior to June 15th. Failure to accurately complete the Declaration of Information can result in a 25% tax increase.

For information concerning the Business Tax, please visit [Talgov.com](http://Talgov.com) or call the Revenue Division at (850) 891-6488.

Thank you for your Payment

2009-10

**CITY OF TALLAHASSEE BUSINESS TAX CERTIFICATE**  
**LOCAL BUSINESS TAX RECEIPT**

2009-10

**TAX CERTIFICATE EXPIRES SEPTEMBER 30, 2010**

Account Number: 71162

**DBA:** THE ADVOCACY GROUP AT CARDENAS PARTNERS,

**Location:** 215 S MONROE ST SUITE 602

**Address:** TALLAHASSEE FL 32301

Type Code	Sub Code	Type Description
850	J	Service - Consultants

**THE ADVOCACY GROUP AT CARDENAS PARTNERS**  
**SARAH BUSK, GOVERNMENT AFFAIRS**

The firm, corporation, organization, business or individual whose name appears hereon has paid a business tax for the business activities indicated above, subject to city, state and federal laws. This certificate must be conspicuously displayed at the location of the business activity. A change of location from the stated business location on this certificate as well as a change in ownership requires a transfer. (See reverse side.)

2009 EXECUTIVE LOBBYING FIRMS

- State Strategies** ..... 850/222-5070  
201 W Park Ave Ste 100, Tallahassee, FL 32301  
*Rebull, Julio G.*  
201 W Park Ave, Tallahassee, FL 32301  
*Rojas, Luis*  
201 W Park Ave, Tallahassee, FL 32301
- Stephen D. Hull, Inc** ..... 850/681-8535  
811 E Call St, Tallahassee, FL 32301  
*Hull, Stephen D.*  
811 E Call St, Tallahassee, FL 32301
- Stephen R. Winn and Associates** ..... 850/878-3056  
1424 Ox Bottom Rd, Tallahassee, FL 32312  
*Winn, Stephen R.*  
1424 Ox Bottom Rd, Tallahassee, FL 32312
- Stiles, Taylor & Grace, P.A.** ..... 813/251-2880  
315 Plant Ave, Tampa, FL 33606  
*Craft, Annemarie*  
Stiles, Taylor, & Grace, P.A., 315 Plant Ave,  
Tampa, FL 33606  
*Stiles, Mary Ann*  
Stiles, Taylor, & Grace, P.A., 315 Plant Ave,  
Tampa, FL 33606
- Susan Glickman Associates** ..... 727/595-7314  
PO Box 310, Indian Rocks Beach, FL 33785  
*Glickman, Susan*  
PO Box 310, Indian Rocks Beach, FL 33785
- Susan Goldstein Consulting, Inc.** ..... 954/830-6300  
3158 Inverness, Weston, FL 33332  
*Goldstein, Susan K.*  
3158 Inverness, Weston, FL 33332
- Sustainable Beaches, LLC** ..... 850/510-8004  
274 Holland Dr, St. Augustine, FL 32095  
*Armbruster, Lisa H.*  
274 Holland Dr, St. Augustine, FL 32095
- Sweetwater Consulting Group** ..... 850/566-1100  
1455 Cane Creek Rd, Quincy, FL 32351  
*Sheheane, G. Herb*  
1455 Cane Creek Rd, Quincy, FL 32351
- Sylvester Lukis & Associates** ..... 305/441-1272  
836 Madrid St, Coral Gables, FL 33134  
*Lukis, Sylvester*  
Sylvester Lukis & Associates, 836 Madrid St,  
Coral Gables, FL 33134
- T.B. Consultants, Inc** ..... 941/750-0110  
1001 Third Ave West Ste 600, Bradenton, FL  
34206  
*McKay, Michelle D.*  
PO Box 71, Bradenton, FL 34206
- Technology Advocates** ..... 850/224-5081  
311 East Park Ave, Tallahassee, FL 32301  
*Bryan, Matt A.*  
Smith, Bryan & Myers, Inc, 311 East Park Ave,  
Tallahassee, FL 32301  
*Hartley, Jeff*  
215 S Monroe St Ste 306, Tallahassee, FL 32301  
*McGee, Wallace Gene*  
Smith, Bryan & Myers, Inc, 311 East Park Ave,  
Tallahassee, FL 32301  
*Myers, Julie S.*  
311 E Park Ave, Tallahassee, FL 32301  
*Naff, Jim A.*  
GMA, Inc, 215 S Monroe St Ste 306, Tallahassee,  
FL 32301
- Roberts, Adam J.*  
Smith Bryan & Myers, Inc, 311 E Park Ave,  
Tallahassee, FL 32301  
*Villella, Ronald*  
Smith Bryan & Myers, Inc, 311 E Park Ave,  
Tallahassee, FL 32301
- Terry Meek** ..... 850/893-7821  
PO Box 13441, Tallahassee, FL 32317  
*Meek, Terry*  
PO Box 13441, Tallahassee, FL 32317
- The Advocacy Group at Cardenas Partners  
LLC** ..... 850/222-8900  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
*Bayliss, Slater W.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
*Busk, Sarah*  
215 S Monroe St Ste 702, Tallahassee, FL 32301  
*Cardenas, Alberto R.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
*Shiver, Stephen W.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301
- The Advocacy Group at Tew Cardenas** ... 850/222-8900  
215 S Monroe St Ste 702, Tallahassee, FL 32301  
*Arza, Hugo P.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
*Bayliss, Slater W.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
Withdrawn: 07/10/2009  
*Busk, Sarah*  
215 S Monroe St Ste 702, Tallahassee, FL 32301  
Withdrawn: 07/10/2009  
*Cardenas, Alberto R.*  
1441 Brickell Ave FL 15, Miami, FL 33131  
*Echemendia, Santiago D.*  
Four Seasons Tower, 1441 Brickell Avenue FL FL  
15, Miami, FL 33131  
*Figueroa, Andreina D.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
*Shiver, Stephen W.*  
215 S Monroe St Ste 602, Tallahassee, FL 32301  
Withdrawn: 07/10/2009
- The Bacall Group** ..... 850/345-6511  
4568 Grove Park Dr, Tallahassee, FL 32311  
*Cox, Bernice*  
THE BACALL GROUP, 4568 Grove Park,  
Tallahassee, FL 32311
- The Bunkley Group Inc** ..... 813/264-2977  
PO Box 340288, Tampa, FL 33694-0288  
*Bunkley, William H.*  
PO Box 340288, Tampa, FL 336940288
- The Cairn Group, Inc.** ..... 850/980-0421  
215 S Monroe St Ste 702, Tallahassee, FL 32301  
*Ross, Ashley Plant*  
215 S Monroe St Ste 702, Tallahassee, FL 32301
- The Catalina Group, Inc** ..... 386/673-8924  
5759 John Anderson Hwy, Flagler Beach, FL  
32136  
*Vogel, Cathleen C.*  
The Catalina Group, 5759 John Anderson Hwy,  
Flagler Beach, FL 32136
- The Commerce Group** ..... 850/425-1344  
104 S Monroe, Tallahassee, FL 32301  
*Fort, Pamela Burch*  
104 S Monroe St, Tallahassee, FL 32301
- The Fiorentino Group** ..... 904/358-2757  
31 West Adams St Ste 204, Jacksonville, FL  
32202

- Taylor, Rayford H.*  
PO Box 191148, Atlanta, GA 311191148
- Strategic Government Consulting Inc . . . . 850/321-9684**  
2144 Heathrow Dr, Tallahassee, FL 32312  
*Grigsby, Thomas J.*  
2144 Heathrow Dr, Tallahassee, FL 32312
- StrategyWise Consulting . . . . . 813/495-1729**  
218 E Bearass Ave Ste 343, Tampa, FL 33613  
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1725 Indiantown Ln, Tallahassee, FL 32317
- Susan Glickman Associates . . . . . 727/595-7314**  
PO Box 310, Indian Rocks Beach, FL 33785  
*Glickman, Susan*  
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*Goldstein, Susan K.*  
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- Sylvester Lukis & Associates . . . . . 305/801-6081**  
836 Madrid St, Coral Gables, FL 33134  
*Lukis, Sylvester*  
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- T. B. Consultants Inc . . . . . 941/750-0110**  
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*McKay, Michelle D.*  
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FL 32301  
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- Busk, Sarah*  
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*Shiver, Stephen W.*  
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Floor, Miami, FL 33131  
Withdrawn: 07/10/2009  
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*Shiver, Stephen W.*  
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- The Aleksander Group . . . . . 866/330-1355**  
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- The Capitulum Group Inc . . . . . 866/611-9454**  
PO Box 141431, Coral Gables, FL 33114  
*Vazquez, Emilio J.*  
PO Box 141431, Coral Gables, FL 33114
- The Catalina Group Inc . . . . . 239/565-1429**  
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*Vogel, Cathleen C.*  
5759 John Anderson Hwy, Flagler Beach, FL  
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- The Chase Law Firm LLC . . . . . 850/385-9880**  
1535 Killearn Center Blvd Ste A1, Tallahassee,  
FL 32309  
*Chase, Jodi L.*  
906 Thomasville Rd, Tallahassee, FL 32303  
*Watson, Screven H.*  
906 Thomasville Rd, Tallahassee, FL 32303  
Withdrawn: 04/21/2009
- The Commerce Group . . . . . 850/425-1344**  
104 S Monroe St, Tallahassee, FL 32301  
*Fort, Pamela Burch*  
104 S Monroe St, Tallahassee, FL 323011530

## **Specific Accomplishments**

As one of Florida's most historic communities, Okaloosa County is faced with a wide range of issues, both as part of a large state and as a diverse area in its own right. From an advocacy perspective, Okaloosa County's greatest challenge will be to articulate the challenges the County is facing from both a policy and political perspective to Legislators and staff who are unfamiliar with the County and not predisposed to be helpful to areas they are not from. An advocate's mission would ostensibly be to assist the county in protecting its greatest treasures while reaping benefits from Florida's position as an epicenter of economic activity in the world.

Okaloosa County's legislative representation should be provided by a group who understands the County and must develop a comprehensive understanding of the County's special needs, along with a well thought out and well implemented plan for meeting those needs. Our distinctive combination of political, legislative and agency experience better qualifies TAG to represent the County. As stated earlier, we maintain a select client base. This allows us to serve our clients in a dedicated fashion while ensuring that we do not put too much pressure on decision makers for any one budget area. This ensures the County's funding requests will be effectively advocated and supported.

Below are some of TAG's experiences dealing similar issues to those that Okaloosa County faces:

### **Economic Development Example – Associated Industries of Florida:**

TAG is at the forefront of some of the legislature's most aggressive pieces of economic development legislation. Most recently in the 2008 and 2009 sessions TAG was the lead lobbyist for the state's largest business group, Associated Industries of Florida (AIF), on all economic development issues before the legislature. Specifically, TAG advocated passing pieces of legislation like HB 7111 (2008) and HB 73 (2009). With HB7111, this bill worked towards broadening the scope of economic incentives for rural counties and sought to help those counties with job growth and economic clustering. With HB 73 (2009) now business growth and expansion will be encouraged by asking that state permits for storm water and environmental resource permits be approved or denied within 45 days for targeted industries only with the approval of local governments. Encouraging economic growth policies while maintaining home rule was a key component of our advocacy efforts on this bill.

Additionally, TAG has worked with several different lobbying groups including Enterprise Florida, AIF and the Florida Chamber of Commerce to support initiatives that have provided relief for areas of economic concern.

**Economic Development Example – City of Ocala:**

With four major state and federal thoroughfares passing through its city limits, Ocala sits at a literal crossroads of Florida's transportation system, making it a vital piece of the state's economy. Thus, economic development is at the forefront of Ocala's legislative agenda. In 2009, in an effort to encourage more state and private investments in the City of Ocala, TAG worked with Senator Evelyn Lynn and Representative Chuck Chestnut to pass legislation designating an Enterprise Zone in the City. The only bill to pass among six Enterprise Zone bills filed in 2009, this legislation will allow the City to apply to the Office of Tourism Trade and Economic Development for the ability to offer tax credits to businesses in a designated low income area within the City. These tax credits will incentivize businesses to create jobs and invest in local community development projects in the City's most depressed areas.

**Economic Development Example – Advantage Capital Partners:**

Advantage Capital Partners is an innovative group of venture capital partnerships that has raised more than \$1 billion in capital. Founded in 1992, the firm has grown to include offices in Missouri, Louisiana, New York, Texas, California, Illinois, Florida, Mississippi and Washington, D.C., with affiliated offices in Alabama, Colorado and Wisconsin. From the start, Advantage Capital has raised private funds to invest in states and communities that are underserved by traditional sources of risk capital. The firm has built a strong and successful track record of public-private partnerships with state and federal economic development organizations, facilitating the flow of billions of dollars of investment capital into these communities. Advantage Capital provides equity and debt capital, along with value-added counsel and other support, to operating businesses that have the potential for excellent investor returns as well as significant community impact. The firm uses this dual bottom line to measure its success. During the 2009 Session TAG was successful in creating the Florida New Markets Development Program, *Fast Track Economic Stimulus for Small Business*. This legislation provides \$97 million dollars of state tax credits and will incentivize \$500 million in private capital for existing and start-up small businesses in Florida's Low Income rural and urban Communities.

**Transportation Example – Pasco County:**

In terms of previous work, an experience which illustrates our approach to successful completion of the work, unique considerations and challenges in achieving a result is our representation of Pasco County. This specific project encountered several political components and required many tactical adjustments. It demonstrates how appropriations and policy matters eventually intersect. The Board of County Commissioners and Manager, along with the leadership of Senator Mike Fasano, outlined the very ambitious goal of acquiring funding for two major transportation projects during the 2005 session.

After several conversations with the Department of Transportation (DOT) and the Governor's office we were able to successfully advocate for the program (\$17 million) in the DOT work program. Unfortunately, the second project was not included due to



budget constraints. Upon reassessing and recalibrating the situation, we began working in concert with Senator Fasano, the Pasco County House delegation and leadership through the legislative process in order to fund the second project.

Although we felt certain our budget language was destined to be vetoed by the Governor based on the criteria of the DOT, we felt showing a consensus of legislative support for the idea sent a powerful message to the DOT and the Governor. The language was eventually included in the budget sent to the Governor. On a parallel track, we advocated legislatively for transportation policy that would have the capacity to fund such projects in the Growth Management Bill which also passed and was sent to the Governor.

As we predicted, our budget funding for the second project was vetoed within the transportation budget. We were, however, able to secure the \$10 million in funding from the Department of Transportation from the additional programs created under the Growth Management legislation. In essence two failures equated to a great success based on creativity and an incremental approach to our efforts.

**Community Development Block Grant (CDBG) Funding Example – Miami-Dade County:**

On December 30, 2005, President Bush signed legislation providing \$11.5 billion in disaster relief to five Gulf Coast states. The CDBG funding was allocated based on Congress' intent that areas of highest need and with greatest concentration of destruction receive priority consideration.

On February 13, 2006, HUD published in the Federal Register a notice of allocations, waivers, and alternative requirements regarding CDBG disaster recovery grants, as funded through the Department of Defense Appropriations Act for FY 2006 (P.L. 109-148). Florida received an \$82.9 million allocation. HUD has asked each state to submit an "Action Plan for Disaster Recovery" to describe how the use of the grant funds will address long-term recovery and infrastructure restoration. From a strategic perspective, TAG led the effort on behalf of Miami-Dade County, designing and implementing a strategy to advance the County's ability to receive Community Development Block Grant disaster recovery monies. From a tactical and advocacy perspective, TAG worked with the Governor's Office and the Department of Community Affairs to advocate for a plan and formula ensuring that Dade County received a proportionate share of the funds and that the funds allocated to the State could be directed toward meeting previously unmet housing needs in areas of concentrated distress, such as Miami-Dade County. Ultimately, TAG was successful in securing \$16,119,191 in CDBG funding for Miami-Dade County.

**Water Funding Example – City of Oviedo:**

A good example of our approach in determining and meeting our clients' needs is our number one objective for The City of Oviedo in 2006. We met with each City Council member along with the City manager. After discussing their individual goals, the Council was able to collectively endorse a request to secure \$380,000 of state funding to

match the City's funding and provide wastewater drainage. Unfortunately, the request did not meet the Department of Environmental Protection's (DEP) criteria for state water project funding.

We worked diligently with the DEP and the Governor's office while we lobbied the House and Senate, a very difficult assignment due to the fact that the project did not appear to meet the funding criteria. Prior to the budget conference and along with Senators Bill Posey and Dan Webster, we were able to secure funding in the Senate budget. We were unable to get the money into the house budget, however, through subsequent advocacy efforts with the Governor's office, House leadership and DEP officials, we were able to establish a strategy for attaining the desired funds. Ultimately we achieved the City's number one priority by securing the full amount in state funding in the legislative budget. As expected, Florida TaxWatch identified our project as one of 489 budget turkeys that year. After substantive conversations with the Governor, we were able to persuade him not to veto the item based on the alternate criteria agreed to through our negotiations.

**Water Funding Example- City of Fort Walton Beach:**

During the 2008 Legislative Session, the City of Fort Walton Beach's legislative priorities included funding for two water projects that the City had been unsuccessful in getting approved by the Governor in previous years. Unfortunately, once a project is vetoed the legislature is less willing to include it in a future budget. However, once hired we were able to reframe these projects and convey that they had merit and stood to make a positive regional impact. In an extremely tight budget year and after negotiations between the House and Senate, the City's Reuse Water System Expansion and Stormwater Improvement Project were eventually included in the Legislature's final budget at \$200,000 apiece, for a total of \$400,000. With the projects in the proper legislative posture, we focused our attention to advocating before the Governor's office, where ultimately, we were successful and the Governor approved both projects.

## References

TAG's team of professionals will constantly monitor issues of importance to the County. Our experience has typically shown the focal point of municipalities to be on specific funding and policy matters with a focus on growth management, transportation, water, and tax policy. Additionally, TAG would explore the possibility of obtaining additional funding for the County through unique funding sources. Specific areas that we have successfully engaged in on behalf of clients include: transportation funding, affordable housing funding, economic development funding, and water funding and as outlined in the client base portion of this RFP.

Although we have broad experience in issues we anticipate Okaloosa County will face, we understand Okaloosa County is a unique County with a very engaged County Commission. Specifically, Okaloosa County appears to take a holistic, long term and regional approach to the growth opportunities and challenges it faces.

The Advocacy Group at Cardenas Partners has been successful for many clients; some of the comparable contracts are as follows:

### *a. Pasco County Board of County Commissioners*

TAG successfully represented Pasco County in securing funding for State Road 52, under the 2005 Growth Management Reform Bill (Senate Bill 360), an allocation of approximately \$10 million. TAG also succeeded in advocating for the inclusion of the continuous right turn lane on U.S. Highway 19 into the Department of Transportation's five year work plan, an allocation of approximately \$17 million in state funding. TAG successfully advocated for a \$5 million storm shelter appropriation in 2006 and \$1 million in Water funding in 2007. In 2008, TAG was able to secure over \$18 million dollars in projects for Pasco County along with an additional \$11 million that Pasco will divide with two other Counties. In 2009, TAG worked with Senate Leadership and the Secretary of the Florida Department of Community Affairs to address Pasco County's concerns relating to the Legislature's proposed extension of the Capital Improvements Element (CIE) financial feasibility requirement in Florida Statutes. Specifically, we were concerned about the impact upon the County's recently adopted CIE, which included a long-term capital improvements schedule and a long-term concurrency management system. TAG was successful in negotiating for the ability to defer the projects in the County's long and short-term CIE, as well as the ability to defer the County's long-term concurrency system planning period from 2023 to 2026 based on the lack of a financial feasibility requirement.

<b>Contact Person:</b>	John Gallagher, County Administrator
<b>Address:</b>	West Pasco Government Center 7530 Little Road, Suite 340 New Port Richey, Florida 34654
<b>Phone:</b>	727.847.8115
<b>Email:</b>	<a href="mailto:pcadmin@pascocountyfl.net">pcadmin@pascocountyfl.net</a>
<b>Contract Date:</b>	April 2005 - Present

***b. City of Ocala***

The Advocacy Group currently represents the City of Ocala, one of the most economically hard-hit cities in Central Florida. In The Advocacy Group's inaugural year of representation, and in one of the toughest economic situations our state has faced, The Advocacy Group was successful in achieving the City's number one priority in creating an Enterprise Zone within Ocala's city limits. The only bill to pass among six Enterprise Zone bills filed in 2009, this legislation will allow the City to apply to the Office of Tourism Trade and Economic Development for the ability to offer tax credits to businesses in a designated low income area within the City. These tax credits will incentivize businesses to create jobs and invest in local community development projects in the City's most depressed areas.

**Contact Person:** Rick Horst, City Manager  
**Address:** City Hall 151 Southeast Osceola Avenue  
Ocala, FL 34471  
**Phone:** 352.629.8401  
**Email:** [rhorst@ocalafl.org](mailto:rhorst@ocalafl.org)  
**Contract Date:** January 2009 – Present

***c. City of Fort Walton Beach***

The Advocacy Group at Cardenas Partners currently represents the City of Fort Walton Beach, which is located in Okaloosa County and is adjacent to Eglin Air Force Base. In 1997, Fort Walton Beach was honored to be named by Money magazine as #10 Best Place to Live among the 300 largest metropolitan areas in the U.S.A. During the 2008 Legislative Session, TAG was successful in securing \$200,000 each for the City's Reuse Water System Expansion and Storm water Improvement Project, for a total of \$400,000.

**Contact Person:** Robert Mearns, City Manager  
**Address:** 107 Miracle Strip Parkway, SW  
Fort Walton Beach, Florida 32548  
**Phone:** 850.833.9504  
**Email:** [rmearns@fwb.org](mailto:rmearns@fwb.org)  
**Contract Date:** December 2007 – Present

***d. City of Oviedo***

TAG currently represents the City of Oviedo before the Executive and Legislative branches of state government. During the 2006 Legislative Session, TAG was able to achieve the City's number one priority by securing \$380,000 in state funding to provide wastewater drainage for Girl's and Boy's Town, which provides a safe environment for girls and boys in crisis, including runaway, homeless, court-placed or abused children. TAG was also successful in securing \$6.5 million in right of way funding under the TRIP program.

**Contact Person:** Richard Gestrich, City Manager  
**Address:** 400 Alexandria Blvd.  
Oviedo, Florida 32765  
**Phone:** 407.977.6000  
**Email:** [rgestrich@oviedofl.net](mailto:rgestrich@oviedofl.net)  
**Contract Date:** November 2005 - Present

***e. Advantage Capital Partners***

Advantage Capital Partners is an innovative group of venture capital partnerships that has raised more than \$1 billion in capital. Founded in 1992, the firm has grown to include offices in Missouri, Louisiana, New York, Texas, California, Illinois, Florida, Mississippi and Washington, D.C., with affiliated offices in Alabama, Colorado and Wisconsin. From the start, Advantage Capital has raised private funds to invest in states and communities that are underserved by traditional sources of risk capital. The firm has built a strong and successful track record of public-private partnerships with state and federal economic development organizations, facilitating the flow of billions of dollars of investment capital into these communities. Advantage Capital provides equity and debt capital, along with value-added counsel and other support, to operating businesses that have the potential for excellent investor returns as well as significant community impact. The firm uses this dual bottom line to measure its success. During the 2009 Session TAG was successful in creating the Florida New Markets Development Program, *Fast Track Economic Stimulus for Small Business*. This legislation provides \$97 million dollars of state tax credits and will incentivize \$500 million in private capital for existing and start-up small businesses in Florida's Low Income rural and urban Communities.

**Contact Person:** Tony Toups, Vice President  
**Address:** 909 Poydras Street, Suite 2230  
New Orleans, Louisiana 70112  
**Phone:** 504.522.4850  
**Email:** [TToups@advantagecap.com](mailto:TToups@advantagecap.com)  
**Contract Date:** April 2005 - Present

## **Additional Information and Comments**

### **Proposed Approach:**

Our Firm would not provide a prepackaged game-plan to assist Okaloosa County. Rather, experience has taught us that TAG's representation should be specifically customized to the evolving political landscape and tailored to Okaloosa County's objectives, needs and special circumstances.

As a practical matter, TAG's representation would include the following: working with the County to formulate a legislative plan designed to anticipate and react to the changing climate in Florida, with the goal of protecting the County's ability to do business in Florida, while creating additional long term relationships that nexus with the policy and political evolutions in Florida.

We typically find that regular and effective communication with a dedicated single contact at the County would allow us the ability to effectively perform the accurate analysis and create opportunities through the evolving politics and priorities of the state.

The following is a general step-by-step approach designed to custom tailor our relationship. TAG is willing to modify these activities at the request of Okaloosa County.

- 1) Our first action will be to conference with the Chairman, the Council Members, the County Administrator and key staff to discuss and establish clear priorities and policy objectives for 2009 and beyond. Additionally, TAG will establish the method of communication including a point person for session and non-session updates.
- 2) Members of TAG, in conjunction with the County, will design a strategic plan to advocate for the agreed upon priorities.
- 3) TAG will then work to schedule meetings with the appropriate legislative committee members, legislative staff, the Governor's Office of Policy and Budget, the Department of Transportation, the Department of Community Affairs, the Department of Environmental Protection, the Agency for Workforce Innovation and any other pertinent agencies or bodies to discuss the client's priorities. These meetings would work toward establishing relationships and understanding for the parties involved and begin the endeavor of securing the appropriate results for the County's needs in these areas.
- 4) TAG will secure legislative champions for substantive legislation and appropriations proposed, necessary to implement the County's solutions and will shepherd these issues through the legislative process.

- 5) TAG will monitor and track legislation and attend committee meetings related to the County's initiatives and priorities.
- 6) Throughout the contract period, TAG will maintain ongoing communication with Okaloosa County as prescribed in the scope of services and discussed at our initial meeting.

As stated, we pride ourselves on working with our clients to set expectations prior to commencement of our efforts. Part of this process includes defining the client's priorities and designing a plan to accomplish the objectives. A major component of this plan is a tiered approach designed to move incrementally, assessing and reassessing our strategies and adopting new approaches to accomplish portions of Okaloosa County's objectives with the idea that smaller pieces add up to complete the stated goal.

The team is committed to work diligently with Okaloosa County to ensure its agenda is met. Okaloosa County can be assured that all resources of TAG will be utilized to meet Okaloosa County's priorities.

We at The Advocacy Group at Cardenas Partners LLC look forward to discussing the possibility of serving the advocacy needs of Okaloosa County.

**Relationships:**

Advocacy typically combines the art of communicating issues in a clear and concise manner, incorporating political and policy components and often times utilizing relationships that have been built over time and are based on trust and political allegiances. As a firm, we pride ourselves on having superior personal and professional relationships with relevant elected, appointed and staff level decision makers. Below you will find a listing of policy and decision makers that we feel will be leadership in the upcoming years relevant to our political and advocacy work, with whom we have solid relationships, fostered by working with them in their communities, on their campaigns and in government. This is by no means a comprehensive list of all our relationships, rather an inventory of current decision makers who have the direct potential to affect our clients. For the purposes of this document, we have simply provided biographical information germane to each decision maker's political relationship with members of our team and will rank our interpersonal relationships in the following manner:

1. Excellent / Personal Relationship
2. Excellent / Staff Relationship
3. Good / Personal Relationship
4. Good / Staff Relationship

**House Leadership**

Larry Cretul Speaker Excellent / Personal

- In the course of representing our client base, Chairman Cretul has sponsored significant legislation on our clients' behalf
- TAG works with Chairman Cretul in the course of our representation of the City of Ocala
- TAG enjoys a Good / Political Relationship with Chairman Cretul
- Al Cardenas was Chairman of the Republican Party of Florida when Chairman Cretul ran for office and was first elected to the Florida Legislature

Ron Reagan Speaker Pro-Tempore Excellent / Personal

- Al Cardenas was Chairman of the Republican Party of Florida when Chairman Reagan ran for office and was first elected to the Florida Legislature

- TAG enjoys an Excellent / Political Relationship with Chairman Reagan

Adam Hasner Majority Leader Excellent / Personal

- Slater Bayliss, during his tenure at the Governor's office of Tourism, Trade and Economic Development, advised Hasner on Economic Development issues
- TAG enjoys an Excellent / Political Relationship with Leader Hasner
- Al Cardenas was Chairman of the Republican Party of Florida when Hasner ran for office and was first elected to the Florida Legislature

Bill Galvano Rules Chairman Excellent / Personal

- Al Cardenas was Chairman of the Republican Party of Florida when Chairman Galvano ran for office and was first elected to the Florida Legislature
- TAG enjoys an Excellent / Political Relationship with Chairman Galvano

Franklin Sands Minority Leader Excellent / Personal

- In the course of representing the Florida Regional Carpenters Council, we frequently work with Leader Sands
- TAG enjoys a Good / Political Relationship with Leader Sands

Dean Cannon Future Speaker 2011  
Select Policy Council on Strategic  
and Economic Planning Chair Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Chairman Cannon

Will Weatherford Future Speaker 2013  
Education Policy Council Chair Excellent / Personal

- In the course of representing Pasco County, we frequently work with Representative Weatherford
- TAG enjoys an Excellent / Political Relationship with Representative Weatherford



David Rivera                                      Appropriations Chair                                      Excellent / Personal

- *Chairman Rivera worked for Al Cardenas during his tenure at the Republican Party of Florida*
- *TAG enjoys an Excellent / Political Relationship with Chairman Rivera*
- *Al Cardenas was Chairman of the Republican Party of Florida when Chairman Rivera ran for office and was first elected to the Florida Legislature*

**Senate Leadership**

Jeff Atwater                                      Senate President                                      Excellent / Personal

- *TAG enjoys an Excellent / Political Relationship with Chairman Atwater*
- *Al Cardenas was Chairman of the Republican Party of Florida when Chairman Atwater ran for office and was first elected to the Florida Legislature*

Mike Fasano                                      President Pro Tempore                                      Excellent / Personal

- *Stephen Shiver worked for Chairman Fasano while the Senator served as the Florida House Majority Leader*
- *In the course of representing Pasco County, we frequently work with Chairman Fasano*
- *TAG enjoys an Excellent / Political Relationship with Chairman Fasano*
- *Al Cardenas was Chairman of the Republican Party of Florida when Chairman Fasano ran for office and was first elected to the Florida Senate*

Al Lawson                                      Minority Leader                                      Good / Personal

- *During his time on the FAMU Board of Trustees, Al Cardenas frequently worked with Leader Lawson regarding FAMU issues*
- *In the course of representing the Florida Carpenters Regional Council, we frequently work with Leader Lawson*
- *TAG enjoys a Good / Political Relationship with Leader Lawson*

Mike Haridopolos                                      Future Senate President 2011                                      Excellent / Personal

- *TAG enjoys an Excellent / Political Relationship with Chairman Haridopolos*
- *Al Cardenas was Chairman of the Republican Party of Florida when Chairman Haridopolos ran for office and was first elected to the Florida Legislature*

JD Alexander                                      Ways and Means Chair                                      Excellent / Personal

- *TAG enjoys an Excellent / Political Relationship with Chairman Alexander*
- *Al Cardenas was Chairman of the Republican Party of Florida when Chairman Alexander ran for office and was first elected to the Florida Legislature*

Thad Altman                                      Finance and Tax Chair                                      Excellent / Personal

- *TAG enjoys an Excellent / Political Relationship with Chairman Altman*

Carey Baker General Government Appropriations Chair Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Chairman Baker
- Al Cardenas was Chairman of the Republican Party of Florida when Chairman Baker ran for office and was first elected to the Florida Legislature
- In the course of representing The Villages, we frequently work with Chairman Baker

**Office of the Governor**

Charlie Crist Governor Good / Personal

- Al Cardenas served as Chairman of the Republican Party of Florida when Governor Crist was elected both Education Commissioner and Attorney General
- Slater Bayliss was designated a Statewide Finance Chair by the Crist for Governor Campaign

Jeff Kottkamp Lt. Governor Excellent / Personal

- Kottkamp serves as Chair of the Florida Sports Foundation, of which Slater Bayliss is a Gubernatorial appointee
- In the course of representing our client base, Lt. Governor Kottkamp sponsored legislation on TAG's behalf during his tenure in the Florida House
- Al Cardenas was Chairman of the Republican Party of Florida when Kottkamp ran for office and was first elected to the Florida Legislature

Eric Eikenberg Chief of Staff Excellent / Personal

- Eikenberg worked for the Republican Party of Florida when Al Cardenas served as Chairman
- TAG enjoys an Excellent/Political Relationship with Eikenberg

Kathy Mears Deputy Chief of Staff Excellent / Personal

- In the course of representing many clients, we have worked with Mears on numerous issues
- Stephen Shiver worked with Mears on political activities in 2006 election cycle
- TAG enjoys an Excellent / Political Relationship with Mears

Shane Strum Deputy Chief of Staff Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Strum

**Governor's Agencies - Department of Environmental Protection**

Mike Sole Secretary Good / Personal

- Sole served in Governor Jeb Bush's administration as the DEP's Chief of Staff during Slater Bayliss' time as Bush's personal aide

**Governor's Agencies - Department of Community Affairs**

Tom Pelham Secretary Good / Personal

## The Advocacy Group at Cardenas Partners LLC

- TAG enjoys a solid working relationship with Secretary Pelham during his previous tenure as DCA Secretary

### **Governor's Agencies - Department of Transportation**

Stephanie Kopelousos      Secretary      Excellent / Personal

- Kopelousos served in Governor Jeb Bush's administration as the DOT's Chief of Staff during Slater Bayliss' time as Bush's personal aide
- TAG enjoys an Excellent / Political Relationship with Secretary Kopelousos

Kevin Thibault      Assistant Secretary / Engineering      Good / Personal

- TAG enjoys and Excellent / Working Relationship with Thibault

John Busse      Chief of Staff      Good / Personal

- TAG enjoys and Excellent / Working Relationship with Busse

Marsha Johnson      Director, Office of Financial Development      Good / Personal

- TAG enjoys and Excellent / Working Relationship with Johnson

### **Cabinet - Chief Financial Officer**

Alex Sink      Chief Financial Officer      Good / Personal

Jim Cassidy      Chief of Staff      Excellent / Personal

- TAG enjoys an Excellent / Working Relationship with Cassidy

Michael Carlson      Director of Legislative Affairs      Good / Personal

- TAG enjoys an Excellent / Working Relationship with Carlson

Ben Diamond      Special Counsel to the CFO      Excellent / Personal

- TAG enjoys an Excellent / Working Relationship with Diamond

### **Cabinet - Agriculture and Consumer Affairs**

Charles Bronson      Commissioner      Excellent / Personal

- Al Cardenas served as Chairman of the Republican Party of Florida when Commissioner Bronson was first elected
- TAG enjoys an Excellent / Working Relationship with Commissioner Bronson

Terri Rhoades      Deputy Commissioner      Good / Personal

- Rhoades served in Governor Jeb Bush's administration as the appointed Agriculture Commissioner during Slater Bayliss' time as Bush's personal aide

### **Cabinet - Attorney General**

Bill McCollum      Attorney General      Excellent / Personal

The Advocacy Group at Cardenas Partners LLC

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- TAG enjoys an Excellent / Working Relationship with General McCollum

Joe Jaycot Deputy Attorney General Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Jaycot

Kimberly Case Director of Legislative Affairs Excellent / Personal

- Stephen Shiver worked with Case in House Majority Leader Mike Fasano's office

**Republican Party of Florida**

Jim Greer Chairman Excellent / Personal

- In the course of representing the City of Oviedo, Slater Bayliss worked closely with then-Oviedo Councilman Greer

Delmar Johnson Executive Director Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Johnson

Joel Springer Director of Senate Campaigns Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Springer

Andy Palmer Director of House Campaigns Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Palmer

**Florida Democratic Party**

Karen Thurman Chairman Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Thurman

Justin Day Alex Sink Campaign Excellent / Personal

- TAG enjoys an Excellent / Political Relationship with Day

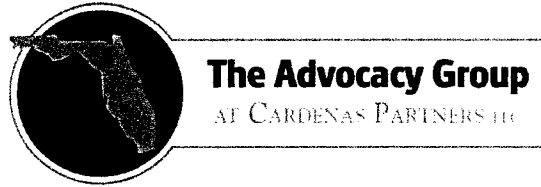
Nancy Texeira Senate Finance Director Good / Personal

- TAG enjoys an Excellent / Political Relationship with Texeira

Jeff Ryan House Finance Director Good / Personal

- TAG enjoys an Excellent / Political Relationship with Ryan

**Work Product Example:**



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**MEMORANDUM**

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**TO:** ROBERT MEARNNS, CITY MANAGER, FORT WALTON BEACH  
**FROM:** SLATER BAYLISS, SARAH BUSK  
**SUBJECT:** POST-SESSION OVERVIEW  
**DATE:** 5.18.09  
**CC:**

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The 2009 Session has at long last come to an end and through much adversity and many obstacles, the Florida Legislature managed to pass a comprehensive budget, along with 271 bills. Below is a summary of the actions taken by the Legislature on the matters we monitored and advocated for or against on behalf of the City of Fort Walton Beach during the 2009 Session.

HB 439 by Representative Reagan/SB 2004 by Sendor Altman, Relating to Uniform Traffic Control **\*\*SUPPORTED\*\***

- This bill creates the Mark Wandall Traffic Safety Program to be administered by DHSMV
- Provides for counties & municipalities to enforce traffic control signals using traffic infraction detectors
- The House and Senate each passed a different version of this legislation and in the end, could not come to an agreement on language
- Representative Reagan will likely file this legislation again next year and in the interim, is encouraging cities and counties to implement red light camera programs on their own

HB 5 by Representative Hooper/SB 538 by Senator Baker, Relating to Firefighters and Municipal Police Officers **\*\*SUPPORTED\*\***

- The bills revises the process for terminating a pension plan and increases the cost to cities when terminating a plan
- The Office of Economic and Demographic Research (EDR) has concluded that the revenue impact of this legislation would be negative indeterminate

- This legislation passed out of both the House and Senate and now awaits the signature of the Governor

HB 611 by Representative Hukill/SB 616 by Senator Haridopolos, Relating to Public Construction Projects **\*\*WORKED WITH BILL SPONSORS TOWARD A CONSENSUS PRODUCT\*\***

- This bill increases the threshold amount for which certain public projects must be competitively awarded
- Revises exceptions to the requirement that certain public projects be competitively awarded
- It also requires a local government to support a decision to perform a project with its own employees and to make a factual finding that the project cost will be the same or less than the lowest bid
- This legislation passed out of both chambers of the Florida Legislature and now awaits the Governor's signature or veto

HB 7123 by the House Economic Development and Community Affairs Policy Council/SB 2322 by Senator Gaetz, Relating to Military Base Closures **\*\*SUPPORTED\*\***

- Establishes Florida Council on Military Base and Mission Support in preparation for the Base Realignment and Closure process
- This bill passed out of both chambers of the Florida Legislature and now awaits the Governor's signature or veto

SB 630 by Senator Bennett/HB 1129 by Representative Grimsley, Relating to Impact Fees/Moratorium on Imposition or Collection **\*\*OPPOSED\*\***

- This bill would have placed a three year moratorium on the imposition or collection of impact fees by a county or municipality
- This legislation died in the Senate Committee on Finance and Tax

HB 1043 by Representative Thompson/SB 2282 by Senator Bennett, Relating to First-responder Services **\*\*MONITORED/OPPOSED\*\***

- Prohibits counties & municipalities from imposing taxes, charging fees, or seeking reimbursement for costs relating to certain first-responder services
- This legislation passed out of the House and Senate and now awaits the Governor's signature or veto

HB 161 by Representative Aubuchon/SB 1040 by Senator Bennett, Relating to Affordable Housing **\*\*MONITORED\*\***

- Provides limitations on the Florida Housing Finance Corporation's access to the state allocation pool
- Provides for the assessment of property receiving the low-income housing tax credit
- This legislation was amended onto Senator Bennett's Growth Management Legislation, SB 360, and now awaits the Governor's signature or veto

SB 2212 by Senator Wilson/HB 1497 by Representative Braynon, Relating to Municipal Water and Sewer Utilities **\*\*OPPOSED\*\***

- This bill would have exempted municipalities in certain counties from applicability of provisions limiting the rates they may charge consumers outside their boundaries for provision of water or sewer utility services
- This legislation was never taken up for consideration by either chamber of the Florida Legislature

HB 73 by Representative Schenck/SB 852 by Senator Fasano, Relating to Expedited Permitting Process for Economic Development Projects **\*\*SUPPORTED\*\***

- This bill requires DEP & water management districts to adopt programs to expedite processing of permits for certain economic development projects
- Requires municipalities & counties to identify certain businesses by commission resolution
- Provides timeframe for permit application approval or denial
- This legislation passed out of the House and Senate and now awaits the Governor's signature or veto

SB 360 by Senator Bennett, Relating to Growth Management **\*\*MONITORED\*\***

- This bill extends dates relating to requirements for adopting amendments to the capital improvements element of a local comprehensive plan
- Provides legislative findings relating to transportation concurrency exception areas
- Revises provisions relating to the state review of comprehensive plans and impact fees
- This legislation passed out of the House and Senate and now awaits the Governor's signature or veto

SB 362 by Senator Bennett, Relating to Growth Management **\*\*OPPOSED\*\***

- This bill would have required the Office of Economic and Demographic Research to annually calculate the population and density criteria needed to determine which jurisdictions qualify as dense urban land areas
- Additionally, it would have authorized the state land planning agency to allow for a projected 5-year capital outlay full-time equivalent student growth rate to exceed certain percent under certain circumstances
- This bill died on the Senate calendar

SB 2148 by Senator Bennett, Relating to Growth Management **\*\*MONITORED\*\***

- This bill would have prohibited the members of the local governing body from serving on the local planning agency
- This legislation died after being heard in only one Senate committee

SB 1306 by Senator Bennett, Relating to Growth Management **\*\*OPPOSED\*\***

- This bill would have revised provisions relating to the concurrency requirements for public facilities and transportation facilities.
- It also proposed to revised provisions relating to the creation of transportation concurrency backlog authorities
- This legislation died in the Senate Committee on Finance and Tax

HB 299 by Representative Tobia/SB 560 by Senator Bennett, Relating to Construction Bonds **\*\*MONITORED\*\***

- This bill would have required surety to record in public records payment bond for public works construction projects
- Additionally, it would have prohibited the issuing authority of a building permit or a private provider providing inspection services from inspecting an improvement until documents relating to the notice of commencement and payment bond have been filed
- It also would have required the clerk of court to serve a notice of contest of lien and contest of nonpayment
- This legislation was never taken up by the House and died in the Senate Committee on Community Affairs

HB 365 by Representative Hooper/SB 1000 by Senator Fasano, Relating to Discretionary Sales Surtaxes **\*\*OPPOSED\*\***

- Authorizes specified counties to levy by ordinance discretionary sales surtax for emergency fire rescue services & facilities for specified purposes
- Requires a referendum on levying the surtax
- This legislation passed out of the House and Senate and now awaits the signature or veto of the Governor

SB 1468 by Senator Dean/HB 825 by Representative Robaina, Relating to Working Waterfront Property **\*\*SUPPORTED\*\***

- This bill would have identified property that is eligible for classification as working waterfront property
- Provides an application and appeals process
- Versions of this legislation passed out of both of the House and Senate, however the two chambers could not agree on language and the bill died

SB 304 by Senator Bennett/HB 105 by Representative Ford, Relating to Homestead Assessments **\*\*OPPOSED\*\***

- Permits an increase in the assessed value of homestead property only when the just value increases
- This legislation was withdrawn from the House prior to introduction and died in committee in the Senate

HB 175 by Representative Soto/SB 356 by Senator Justice, Relating to Local Government Officers and Employees **\*\*SUPPORTED\*\***



- This bill would have expanded eligibility for participation in the state group health insurance program and the prescription drug coverage program to include all counties, municipalities, special taxing districts, and district school boards rather than only small counties and municipalities and certain school boards
- The Senate bill died in the Committee on Community Affairs and the House bill was withdrawn prior to introduction

SB 732 by Senator Smith/HB 569 by Representative K. Roberson, Relating to Investment of Public Funds **\*\*MONITORED\*\***

- This bill requires that the Chief Financial Officer and local governments deposit surplus funds in financial deposit instruments insured by the Federal Deposit Insurance Corporation rather than in certificates of deposit
- This legislation passed out of both the House and the Senate and now awaits the signature or veto of the Governor.

HB 691 by Representative Hudson/SB 1192 by Senator Richter, Relating to State Oversight of Utility Services Provided by Intergovernmental Authorities **\*\*OPPOSED\*\***

- This bill deletes provision exempting intergovernmental authorities from being subject to jurisdiction of PSC
- The House bill died in the Committee on Military and Local Affairs and the Senate bill died in the Committee on Communications, Energy and Public Utilities

**\*\*JOINT RESOLUTIONS\***

HB 1263 by Representative Flores/SB 1906 by Senator Haridopolos, Relating to Government Revenues/Voter Approval/New Taxes & Fees **\*\*OPPOSED\*\***

- This bill proposed an amendment to Section 1 and the creation of a new section in Article VII of the State Constitution to limit state and local government revenues and require voter approval of new taxes and fees
- This legislation died in committees of both the House and Senate

HB 1013 by Representative Hasner/SB 1908 by Senator Richter, Relating to Guaranteeing the Right to Vote by Secret Ballot **\*\*MONITORED\*\***

- This bill proposed a constitutional amendment, declaring that the right of individuals to vote by secret ballot is fundamental
- This legislation passed out of the House, but was never taken up by the Senate

HB 905 by Representative Flores, Relating to State and Local Government Revenue Limitations **\*\*OPPOSED\*\***

- This bill would have revised state revenue limitation by providing that state revenue growth shall be limited to changes in population & inflation, plus one percentage point
- Additionally, it would have limited revenue that can be collected by counties, municipalities, school districts, & special districts
- This bill was withdrawn prior to introduction

HB 385 by Representative Rivera/SB 738 by Senator Bennett, Relating to Limitation on Aggregate Ad Valorem Taxes on Real Property **\*\*OPPOSED\*\***

- This bill would have limited total ad valorem tax on parcel of real property to 1.35 percent of highest taxable value of property
- Also, it would have applied a limitation to all ad valorem taxes on real property except those levied for payment of local bonds issued to finance or refinance capital projects authorized by law & approved by vote of electors or to refund outstanding bonds or levied for periods not longer than 2 years when authorized by vote of electors
- The Office of Economic and Demographic Research (EDR) concluded that the annual revenue impact of this legislation on local governments would be \$3.8 billion
- TAG worked with Chairman Thad Altman to hold this legislation up in the Senate Committee on Finance and Tax
- This legislation passed out of the House, but died in the Senate Committee on Finance and Tax

HB 97 by Representative Domino/SB 532 by Senator Lynn, Relating to Additional Homestead Exemption for First-Time Homestead Property Owners **\*\*OPPOSED\*\***

- Originally, this bill provided first-time homestead property owners with additional homestead exemption equal to 50 percent of property's just value in first year, limited to \$250,000
- It was amended to provide a homestead exemption, for homeowners who have not owned property in any state over the past 8 years, of 25 percent of the just value of the homestead, not to exceed \$100,000. The additional homestead exemption would decrease by 20 percent each subsequent year
- This legislation will be placed on the 2010 general election ballot and must be approved by a margin of at least sixty percent

## **BUDGET**

In the midst of a statewide budget crisis, after the recent appropriations trouble associated with the panhandle region and because the Senate President and Speaker of the House made the executive decision not to allow Community Budget Issue Requests this year, the decision was made that the City would not proceed with any appropriations requests for 2009. However, in accordance with the City's long term goals, TAG was directed to assist with funding for Defense Infrastructure Grants in hopes that the City may be eligible to compete for funding for the Hurlburt Reuse Project. Over the last several months, TAG has engaged in many conversations with the City Manager with regard to the City's pending grant application and after working with legislative leaders and budget chairs, the Legislature funded the State Defense Infrastructure Grant Program at \$500,000.

## CONFLICT OF INTEREST DISCLOSURE FORM

For purposes of determining any possible conflict of interest, all bidders/proposers, must disclose if any Okaloosa Board of County Commissioner, employee(s), elected officials(s), of if any of its agencies is also an owner, corporate officer, agency, employee, etc., of their business.

Indicate either "yes" (a county employee, elected official, or agency is also associated with your business), or "no". If yes, give person(s) name(s) and position(s) with your business.

YES \_\_\_\_\_

NO  \_\_\_\_\_

**NAME(S)**

**POSITION(S)**

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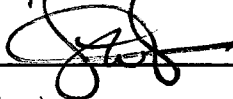
FIRM NAME:

The Advocacy Group at Cardenas Partners LLC

BY (PRINTED):

Stephen W. Shiver

BY (SIGNATURE):



TITLE:

Partner

ADDRESS:

215 South Monroe Street, Suite 602

Tallahassee, FL 32301

PHONE NO.

850.222.8900

E-MAIL

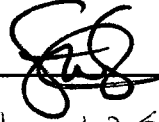
ss@cardenaspartners.com

# DRUG-FREE WORKPLACE CERTIFICATION

THE BELOW SIGNED BIDDER CERTIFIES that it has implemented a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under quote a copy of the statement specified in subsection 1.
4. In the statement specified in subsection 1, notify the employees that, as a condition of working on the commodities or contractual services that are under quote, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in, drug abuse assistance or rehabilitation program if such is available in employee's community, by any employee who is convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

DATE: September 16, 2009 SIGNATURE:   
COMPANY: The Advocacy Group of Cardenas Partners NAME: Stephen W. Shiver  
(Typed or Printed)  
ADDRESS: 215 South Monroe Street TITLE: Partner  
Suite 602  
Tallahassee, FL 32301 E-MAIL: ss@cardenaspartners.com  
PHONE NO.: 850.222.8900

## INDEMNIFICATION AND HOLD HARMLESS

To the fullest extent permitted by law, CONTRACTOR shall indemnify and hold harmless COUNTY, its officers and employees from liabilities, damages, losses, and costs including but not limited to reasonable attorney fees, to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the CONTRACTOR and other persons employed or utilized by the CONTRACTOR in the performance of this Agreement.

The Advocacy Group at Cardenas  
Bidder's Company Name Partners

215 South Monroe Street, Suite 1002  
Physical Address Tallahassee, FL 32301

Same  
Mailing Address

850.222.8100  
Phone Number

850.251.0844  
Cellular Number

September 16, 2009  
DATE

  
Authorized Signature - Manual

Stephen W Shiver  
Authorized Signature - Typed

Partner  
Title

850.841.7653  
FAX Number

850.345.9392; 850.251.7710; 850.251.0844  
After-Hours Number(s)

**PROPOSAL FORM**  
**RFP #: BCC 36-09**  
**FLORIDA LOBBYING SERVICES**

THE RATE WAS NEGOTIATED  
 DOWN TO \$40,000 PER YEAR  
 IN DISCUSSION BETWEEN  
 JIM COMM & SLATER BARRETT

ITEM #	DESCRIPTION	RATE
1	ANNUAL LUMP SUM	55,000
2	ANNUAL RETAINER (IF ANY)	4,583.33
3	HOURLY RATE FOR ADDITIONAL WORK	

(20)  
 12-2-09

**\*Attach Additional Pricing Sheets, if necessary.**

  
 \_\_\_\_\_  
 Authorized Signature

Stephen W. Shiver, Partner  
 \_\_\_\_\_  
 Printed Name & Title

The Advocacy Group at Cardenas  
 \_\_\_\_\_  
 Company Partners

September 16, 2009  
 \_\_\_\_\_  
 Date

27-0393975  
 \_\_\_\_\_  
 Federal ID # or SS #

215 South Monroe Street, Suite 602  
 \_\_\_\_\_  
 Address

Tallahassee, FL 32301  
 \_\_\_\_\_  
 City, State, Zip Code

850 222-8900  
 \_\_\_\_\_  
 Phone #

850 841-7653  
 \_\_\_\_\_  
 Fax #

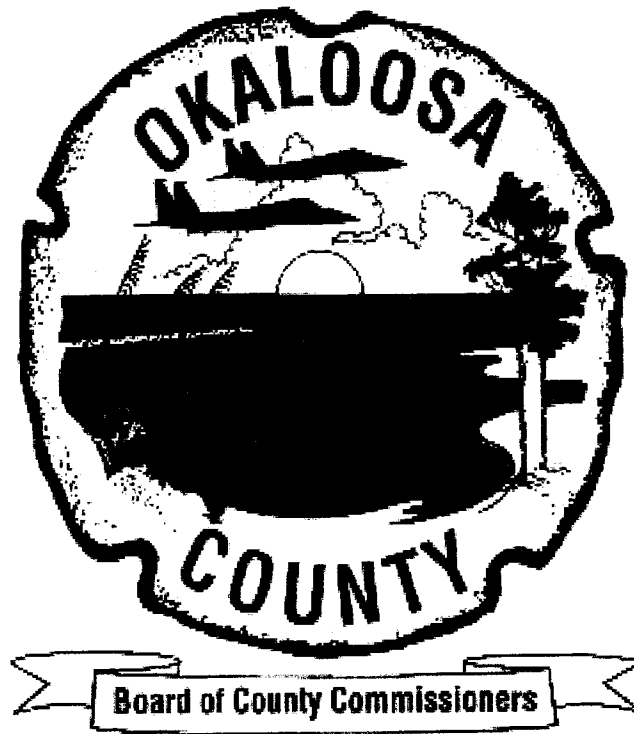
ss@cardenaspartners.com  
 \_\_\_\_\_  
 E-mail address

## **Rate Proposal**

Our experience tells us that the time we spend with individual clients varies from month to month. Therefore, we would not want to limit the number of hours TAG will dedicate to working toward Okaloosa County's success. The professionals at TAG will be available 24 hours a day. In exchange for the services provided as outlined in this proposal, we suggest a fair and reasonable annual retainer fee of \$55,000.00, or \$4,583.33 per month. However, at this point in the selection process, our fee is negotiable relative to the scope of work to be determined.

Additionally, The Advocacy Group at Cardenas Partners LLC, may be retained by Okaloosa County on an as-needed basis for other projects that are substantially outside the scope of this agreement. In the event such services are required, the parties agree to negotiate separate fees for each project and rather than proposing an hourly rate for the work of individuals, we typically charge a fee based on the work of the team as a whole.

**FLORIDA LOBBYIST SERVICES  
FOR THE  
OKALOOSA COUNTY BOARD OF COUNTY  
COMMISSIONERS**



**PROPOSAL #: BCC 36-09**

**PROPOSAL CLOSING: SEPTEMBER 18, 2009 @ 4:00 P.M.**

**THE INTENT OF THIS RFP IS TO OBTAIN LOBBYIST SERVICES  
FOR THE OKALOOSA COUNTY BOARD OF COUNTY COMMISSIONERS**



**REQUEST FOR PROPOSAL/QUALIFICATIONS FOR  
LOBBYIST SERVICES FOR THE OKALOOSA COUNTY BOARD OF COUNTY COMMISSIONERS**

The Okaloosa County Board of County Commissioners under the provisions of Section 287.055, Florida Statutes and County policy, request qualifications from professional firms to provide services for the Okaloosa County Board of County Commissioners.

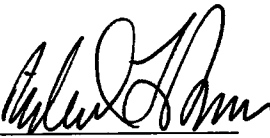
Guidelines detailing form and content requirements for the statement of qualifications/proposal are available by contacting Richard Brannon, Purchasing Director, 602-C North Pearl St, Crestview FL 32536; 850-689-5960, or they may be downloaded from our website at [www.co.okaloosa.fl.us](http://www.co.okaloosa.fl.us) (Departments, Purchasing, Vendor Registration & Opportunities); this links you to the Florida Panhandle Purchasing Group website where our bid specifications will now be posted.

Proposals must be delivered to the Okaloosa County Purchasing Department at the address below no later than **4:00 p.m. (CST)** on **September 18, 2009** in order to be considered.

All proposals must be in sealed envelopes reflecting on the outside thereof **"Proposal for Lobbyist Services for the Okaloosa County Board of County Commissioners."**

All proposals should be addressed as follows:

Okaloosa County Purchasing Department  
Richard Brannon  
602-C North Pearl St.  
Crestview FL 32536

  
\_\_\_\_\_  
Richard L. Brannon  
Purchasing Director

08-19-09  
\_\_\_\_\_  
Date

**GUIDELINES FOR STATEMENT OF QUALIFICATIONS/PROPOSAL  
LOBBYIST SERVICES FOR OKALOOSA COUNTY  
BOARD OF COUNTY COMMISSIONERS (BCC)**

The purpose of this Request for Proposal/Qualifications is to provide interested lobbyists with guidelines and information to enhance their submission of proposals on the project entitled **"LOBBYIST SERVICES FOR OKALOOSA COUNTY BOARD OF COUNTY COMMISSIONERS (BCC)."**

Okaloosa County plans to retain professional lobbyist services to represent the BCC before the Florida Legislature, Governor and the Florida Executive Branch. The consultant shall work closely with the County's liaison, Mr. James Curry. The firm(s) will represent the BCC in matters such as but not limited to:

1. Funding for infrastructure
2. Wastewater treatment
3. Solid waste disposal
4. Potable water system expansion
5. Recreation and parks
6. Grants

**AGENCY OVERVIEW** – The County is a political subdivision of the State of Florida and is located in Northwest Florida. Okaloosa County has a population of more than 189,000. Okaloosa County has 24 miles of beachfront on the ("Emerald Coast") Gulf. Much of the County is taken up by part of Eglin Air Force Base – the largest land mass Air force Base in the world. Okaloosa County works under a County Administrator and (5) County Commissioners.

**SCOPE OF WORK** – The County is requesting sealed proposals from qualified consulting firms or individuals for the provision of lobbyist services to represent the County in Tallahassee, FL. The consultant shall work closely with the County's liaison in the development and ongoing implementation of these programs and shall provide, at a minimum, the following services:

- A. Meet with County staff and County Board to assist in the development of the County's list of goals, priorities and specific projects. Identify which of these goals, priorities and specific projects could be addressed at the State level and assist in developing written material on each request to provide to congressional staff.
- B. Provide County staff and County Board with any new information that may impact, and actively seek opportunities to enhance the County's State legislative program and provide options as to legislative strategy when necessary.
- C. Revise the County's State legislative program as needed, and as requested by the County Board through County staff.
- D. Monitor current State legislation and the State budget process and report to the County, both orally and in writing, any legislative events that may directly or indirectly impact the County. Attend meetings as necessary.
- E. Provide the County with regular reports and updates on all legislative and budgetary issues that may impact the County.
- F. Advocate the Florida Legislature in support of the County's goals, priorities and projects.

- G. At the conclusion of session, prepare a final report, including the final status of the County's priorities and a summary of the impact of major legislative changes to Okaloosa County.
- H. Monitor various State agency actions for potential impact on the County and, in the event that action is needed, advise the County.

Qualified firms wishing to respond to the RFP must directly provide all services described in this document.

The successful proposal will appoint one of their employees as the key contact for approval by the County's Project Manager.

The term of the contract will be for one (1) year. The County reserves the right to review these contracts for two (2) additional one-year contract periods. Renewal of the contract period shall be recommended by the County Manager through the board of County Commissioners" discretion. <sup>renew</sup>

The Board of County Commissioners reserves the right to accept or reject any or all statement of qualifications/proposals or to waive any informality existing in any proposal, or to accept the proposals which best serves the interest and intent of this project and is from the most responsive and responsible firms.

An original and five (5) copies of the proposal will be required with all copies having been signed by a company official with the power to bind the company in its proposals. All must be completely responsive to the Request for Proposal/Qualifications guidelines for consideration.

The content of the statement of qualifications/proposal of the successful firms will become a basis for contractual negotiations.

The selected consultant shall be required to assume responsibility for all services offered in his proposal. The selected consultant will be the sole point of contact concerning contractual matters including payments of any charges resulting from the contract.

Payment schedule and basis for payment will be negotiated. Please submit with your proposal an annual fee for providing this service and an hourly rate for any work assigned by the County for work considered outside of the contract.

Proposals **MUST** be submitted in the format described below:

1. Letter of interest including information on location of the firm's office that will be the lead office for this contract (name, location, date established).
2. **Business Credentials** – Provide a synopsis of the consultant's qualifications, to include specific capabilities of the firm, brief history of the firm and financial status.
3. **Registration** – State the State of Florida licensing/registration qualifications of the consultant's personnel and business office. Provide copies of same to include evidence that the firm is registered to lobby the legislature and executive branch of Florida government.
4. **Specific Accomplishments** – Include any specialized experience relative to the specified services within the last three (3) years. The list should include only projects that had significant input from individuals who will be assigned to work on County project.

5. **References** – List five (5) references representative of related past experience to include, as a minimum, a contact person, company name, phone # and a brief description of the project.
6. **Additional Information & Comments** – The contents under this heading are left to the discretion of the consultant. Material must be pertinent to the proposal but not be otherwise requested in the Request for Proposal/Qualifications.
7. **Conflict of Interest Disclosure Form** – The award hereunder is subject to the provisions of Chapter 112, Florida Statutes. All respondents must disclose with their proposals the name of any officer, director, or agent who is also a public officer or an employee of the Okaloosa Board of County Commissioners, or any of its agencies.

Furthermore, all respondents must disclose the name of any County officer or employee who owns, directly or indirectly, an interest of five percent (5%) or more in the firm or any of its branches.

Furthermore, the official, prior to or at the time of submission of the proposal, must file a statement with the Clerk of Circuit Court of Okaloosa County, if he is an officer or employee of the County, disclosing his or spouse's or child's interest and the nature of the intended business.

**Note: For proposer's convenience, this certification form is enclosed and is made a part of the proposal package.**

8. **Identical Tie Proposals** – Preference shall be given to businesses with drug-free workplace programs. Whenever two or more proposals that are equal with respect to price, quality and service are received by the County for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process (see attached certification form).

Established procedures for processing tie proposals will be followed if none of the tied vendors have a drug-free workplace program.

**Note: For proposer's convenience, this certification form is enclosed and is made a part of the proposal package.**

9. **Indemnification & Hold Harmless** – To the fullest extent permitted by law, contractor shall indemnify and hold harmless County, its officers and employees from liabilities, damages, losses, and costs including but not limited to reasonable attorney fees, to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the contractor and other persons employed or utilized by the contractor in the performance of this agreement.

Proposal Opening shall be public on the date and time specific on the proposal form. It is the proposer's responsibility to assure that his proposal is delivered at the proper time and place. Offers by telegram, facsimile or telephone are not acceptable. **Note:** Crestview is "**not a next day guaranteed delivery location**" by delivery services.

The Board of County Commissioners of Okaloosa County in its absolute discretion may reject any proposal of a proposer that has failed, in the opinion of the Board, to complete or perform an Okaloosa County contracted project in a timely and acceptable fashion, and has directed the Okaloosa County Purchasing Director to emphasize this condition to potential proposers.

**EVALUATION/SELECTION OF PROPOSALS** – A Selection Review Committee will evaluate all proposals received and:

1. Prepare an alphabetical listing of those proposers determined to be interested and available. Evaluate the proposals meeting minimum submission criteria based upon qualifications and conduct discussions with those firms deemed to be the most highly qualified to provide the services required. Each of the firms will be required to execute the Truth-in-Negotiation certificate as defined in Florida Statutes 287.055. Selection as best qualified will be based on the following considerations:
  - a. Responsiveness of the proposal clearly stating an understanding of the work to be performed for the County.
  - b. Firm's reputation and competence, including technical education and training, experience, availability of adequate personnel, equipment and facilities, the extent of repeat business of the firm.
  - c. Current workload.
  - d. Financial responsibility.
  - e. Past record of professional accomplishments.
  - f. Qualifications of personnel assigned to the program.
  - g. Firm's capability to meet schedules.
  - h. Willingness to meet time and budget requirements.
2. Review of all proposals received will proceed as follows:
  - a. The Selection Committee will review all written documents submitted.
  - b. The Committee's ranking of prospective firms shall be based on the firm's capabilities, ability, adequacy of personnel, past record, recent experience and current workload.
  - c. The Committee may request oral presentations from the vendors when establishing the recommended priority or short list.
3. Negotiations between the Selection Committee and the priority vendors (the vendors ranked highest on the Board approved short list) that will proceed as follows:
  - a. Negotiations will be held with the first vendor on the priority list.
  - b. If no tentative agreement can be reached with the first vendor, then negotiations will commence with the second vendor on the short list.
  - c. If no tentative agreement can be reached with the second vendor, then negotiations will commence with the third vendor.
  - d. If no tentative agreement is reached with the third vendor, then the Committee shall return to the Board to report such and recommend that a new short list be established from among the other proposals submitted. If for any reason said procedure is not feasible, the Committee shall seek direction from the Board as to how to proceed further.

- e. Okaloosa County reserves the right to negotiate contracts with one or more firms for these services.
4. Presentation of the tentative agreements by the Selection Committee to the Board for approval. The Executive Summary shall inform the Board as to the terms, conditions and costs associated with the contract.
5. Upon approval of the agreement by the Board, execution of a formal written agreement prior to commencement of the work associated with the contract.
6. **Direct contact one-on one with the Committee members is not allowed.** Selection will be on the basis of professional qualifications and experience.
  - a. The Selection Review Committee will evaluate and rank all proposals meeting the minimum submission requirements and enter into formal negotiations with said firms. Firms will be notified of dates and times of any interviews.

**PROPOSAL OPENING** – Proposal Opening shall be public on the date and time specified on the proposal form. It is the proposer's responsibility to assure that his proposal is delivered at the proper time and place. Offers by telegram, facsimile or telephone are **NOT** acceptable.

**Note:** Crestview, Florida is "**not a next day guaranteed delivery location**" by delivery services.

**Public Entity Crime Information** - 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, for **CATEGORY TWO** for a period of 36 months from the date of being placed on the convicted vendor list.

The engagement of certain professional services, including those required by this Request for Proposals, is exempt from the provisions of the Administrative Procedure Act, Chapter 120, Florida Statutes, as amended, and therefore are not to be subject to the appeal process therein described at any time during the solicitation period.

**Right to Waive and Reject**

- A. The Board, in its absolute discretion, may reject any proposal of a proposer that has failed, in the opinion of the Board, to complete or perform an Okaloosa County contracted project in a timely fashion or has failed in any other way, in the opinion of the Board, to perform a prior contract in a satisfactory manner, and has directed the Okaloosa County Purchasing Director to emphasize this condition to potential proposers.
- B. There is no obligation on the part of the County to award the proposal to the lowest proposer, and the County reserves the right to award the proposal to proposer submitting a responsive proposal with a resulting negotiated agreement which is most advantageous and in the best interest of Okaloosa county, and to reject any and all proposals or to waive any irregularity or technicality in proposals received. Okaloosa County shall be the sole judge of the proposal and the resulting negotiated agreement that is in its best interest and its decision shall be final.

- C. The Board of County Commissioners reserves the right to waive any informalities or reject any and all proposals, in whole or part, to utilize any applicable state contracts in lieu of or in addition to this proposal and to accept the proposal that in its judgment will best serve the interest of the County.
- D. The Board of County Commissioners specifically reserves the right to reject any conditional proposal and will normally reject those which made it impossible to determine the true amount of the proposal.

**Disqualification of Proposers** -Any of the following reasons may be considered as sufficient for the disqualification of a proposer and the rejection of his proposal or proposals:

- A. More than one proposal for the same work from an individual, firm or corporation under the same or different name.
- B. Evidence that the proposer has a financial interest in the firm of another proposer for the same work.
- C. Evidence of collusion among proposers. Participants in such collusion will receive no recognition as proposers for any future work of the County until such participant shall have been reinstated as a qualified proposer.
- D. Uncompleted work which in the judgment of the County might hinder or prevent the prompt completion of additional work if awarded.
- E. Failure to pay or satisfactorily settle all bills due for labor and material on former contracts in force at the time of advertisement of proposals.
- F. Default under previous contract.
- G. The Board, in its absolute discretion, may reject any proposal of a proposer that has failed, in the opinion of the Board, to complete or perform an Okaloosa County contracted project in a timely fashion or has failed in any other way, in the opinion of the Board, to perform a prior contract in a satisfactory manner, and has directed the Okaloosa County Purchasing Director to emphasize this condition to potential proposers.

**Discrimination** - An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid on a contract to provide goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not award or perform work as a contractor, supplier, subcontractor, or consultant under contract with any public entity, and may not transact business with any public entity.

**Regulations & Ordinances** – The proposer is required to be familiar with all Federal, State and local laws, ordinances, code rules and regulations that may in any way affect the work. Ignorance on the part of the proposer shall in no way relieve proposer from responsibility.

**Prohibition Against Contingent Fees** – Florida Statute 287.6.a. requires the following statement, duly signed and notarized, be included in each submittal:

“The respondent warrants that he or she has not employed or retained any company or person, other than a bona fide employee working solely for the respondent to solicit or secure this agreement and that he or she has not paid or agreed to pay any person,

company, corporation, individual or firm, other than a bona fide employee working solely for the respondent, any fee, commission or percentage, gift or other consideration contingent upon or resulting from award or making of this agreement.”

**Payment** – The contractor shall be paid upon submission of invoices, through the requesting department, to the Okaloosa County Board of County Commissioners, Finance Office, 302 N. Wilson St. #203, Crestview FL 32536. The prices stipulated here for articles delivered and accepted. All invoices must show the County contract #.

**Information** – Any questions should be directed to Richard Brannon, Okaloosa County Purchasing Dept; 850-689-5960. Any changes by the County to specifications shall be in writing in the form of an addendum and furnished to all proposers. Verbal information obtained otherwise will not be considered in awarding of proposals. **Proposers must understand that they are not allowed to contact the Review Committee members for information.**



## **INSURANCE REQUIREMENTS**

### **Contractor's Insurance**

1. The Contractor shall not commence any work in connection with this agreement until he has obtained all required insurance and such insurance has been approved by the Okaloosa County Risk Management Officer nor shall the Contractor allow any subcontractor (approved by County of Okaloosa) to commence work in this subcontract until all similar insurance required of the subcontractor has been so obtained and approved.
2. All insurance policies shall be with insurers licensed to do business in the State of Florida, and any insuring company is required to have a minimum rating of A, Class X in the Best's Key Rating Guide published A.M. Best & Co., Inc.
3. The County of Okaloosa shall be furnished proof of coverage by a certified, complete duplicate of all insurance contracts including every endorsement. The complete insurance contracts must be delivered to the County Representative not less than ten (10) days prior to the commencement of any and all contractual agreements between the County of Okaloosa and the Contractor. The County shall retain the right to reject all insurance contracts that do not meet the requirement of this Agreement.
4. The insurance definition of Insured or Additional Insured shall include subcontractor, sub-subcontractor and any associated or subsidiary companies of the Contractor that are involved and which are part of the contract.
5. The County of Okaloosa reserves the right during the term of this contract to request additional certified copies of any insurance contracts to support any Certificates of Insurance. At any time the insurance coverage is unacceptable to the County of Okaloosa, the County reserves the right to terminate this contractual agreement.
6. The designation of Contractor shall include any associated or subsidiary company which is involved and is a part of the contract and such, if any associated or subsidiary company involved in the project must be named in the workers compensation coverage.
7. All policies shall be written so that the County of Okaloosa will be notified of cancellation or restricted amendments at least thirty (30) days prior to the effective date of such cancellation or amendment, such notice to be given directly to the County representative.
8. All insurance contracts should list Okaloosa County as an Additional Insured. The Contractor shall provide the County current Certificates of Insurance for all policies.

### **Workers' Compensation Insurance**

1. The Contractor shall secure and maintain during the life of this agreement Workers' Compensation insurance for all of his employees employed for the project or any site connected with the work, including supervision, administration or management, of this project and in case any work is sublet, with the approval of the County of Okaloosa, the Contractor shall require the Subcontractor similarly to provide Workers' Compensation insurance for all employees employed at the site of the project, and such evidence of

insurance shall be furnished the County of Okaloosa not less than ten (10) days prior to the commencement of any and all subcontractual agreements which have been approved by the County of Okaloosa.

2. Such insurance shall comply with the Florida Workers' Compensation Law.
3. No class of employee, including the contractor himself, shall be excluded from the Workers' Compensation insurance coverage. The Workers' Compensation insurance shall also include Employer's Liability coverage.

### **Business Automobile and Public Liability Insurance**

1. The Contractor shall maintain Business Automobile Liability insurance coverage throughout the life of this Agreement. The insurance shall include Owned, Non-owned & Hired Motor Vehicle coverage.
2. The Contractor shall carry other Public Liability (Commercial General Liability) insurance against all other Bodily Injury, Property Damage and Personal and Advertising Injury exposures. The coverage shall include both On-and Off-Premises Operations, Contractual Liability, Board Form Property Damage, and Professional Liability.
3. All liability insurance (other than Professional Liability) shall be written on an occurrence basis and shall not be written on a claim-made basis. If the insurance is issued with an aggregate limit of liability, the aggregate limit of liability shall apply only to the locations included in this Agreement. If, as the result of any claims or other reasons, the available limits of insurance reduce to less than those stated in the Limits of Liability, the Contractor shall notify the County representative in writing. The Contractor shall purchase additional liability insurance to maintain the requirements established in this Agreement. Umbrella or Excess Liability insurance can be purchased to meet the Limits of Liability specified in this Agreement.
4. Public liability (Commercial General Liability) coverage shall be endorsed to include the following:
  - a. Premises – Operation Liability
  - b. Occurrence Bodily Injury and Property Damage Liability
  - c. Independent Contractor's Liability
  - d. Completed Operations and Products Liability
5. Contractor shall agree to keep in continuous force Commercial General Liability coverage including Completed Operations and Products Liability for two (2) years beyond acceptance of project.

**Limits of Liability**

The insurance required shall be written for not less than the following, or greater if required by law and shall include Employer’s liability with limits as prescribed in this contract:

	<u><b>LIMIT</b></u>
1. Worker’s Compensation	
1) State	Statutory
2) Employer’s Liability	\$1 million each accident
2. Business Automobile & Commercial General Liability Insurance	\$1,000,000 each occurrence (A combined single limit)
3. Personal and Advertising Injury	\$250,000

**Notice of Claims or Litigation**

The Contractor agrees to report any incident or claim that results from performance of this Agreement. Within ten (10) days of the Contractor’s knowledge, the County representative shall receive written notice describing the incident or claim. In the event such incident or claim involves injury or property damage to a third party, verbal notification shall be given the same day the Contractor becomes aware of the incident or claim. A detailed written report is to be made within ten (10) days.

**Indemnification & Hold Harmless**

To the fullest extent permitted by law, Contractor shall indemnify and hold harmless COUNTY, its officers and employees from liabilities, damages, losses, and costs including but not limited to reasonable attorney fees, to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the Contractor and other persons employed or utilized by the Contractor in the performance of this contract.

**Certificate of Insurance**

1. All insurance shall include the interest of all entities names in and its respective agents, consultants, servants and employees of each and all other interests as may be reasonably required by Okaloosa County as Additional Insured. The coverage afforded the Additional Insured under this policy shall be primary insurance. If the Additional Insured have other insurance that is applicable to the loss, such other insurance shall be on an excess or contingent basis. The amount of the company’s liability under this policy shall not be reduced by the existence of such other insurance.
2. Certificates of insurance, in duplicate, indicating the job site and evidencing all required coverage must be submitted to and approved by Okaloosa County prior to the commencement of any of the work. The certificate holder(s) shall be as follows:

Okaloosa County  
602-C North Pearl Street  
Crestview, Florida 32536

3. All policies shall expressly require 30 days written notice to Okaloosa County at the address set out above, or the cancellations of material alterations of such policies, and the Certificates of Insurance, shall so provide.

4. All certificates shall be subject to Okaloosa County's approval of adequacy of protection and the satisfactory character of the Insurer.
5. The Certificates of Insurance shall disclose any and all deductibles or self-insured retentions (SIRs). Deductibles or SIRs in excess of \$10,000 will not be accepted unless specifically approved in writing by Okaloosa County. All deductibles or SIRs, whether approved by Okaloosa County or not, shall be the Contractor's full responsibility. In particular, the Contractor shall afford full coverage as specified herein to entities listed as Additional Insured.

In no way will the entities listed as Additional Insured be responsible for, pay for, be damaged by, or limited to coverage required by this schedule due to the existence of a deductible or SIR. Specific written approval from Okaloosa County will only be provided upon demonstration that the Contractor has the financial capability and funds necessary to cover the responsibilities incurred as a result of the deductible or SIR.

6. In the event of failure of the Contractor to furnish and maintain said insurance and to furnish satisfactory evidence thereof, Okaloosa County shall have the right (but not the obligation) to take out and maintain insurance on the project. All costs for the coverage will be paid by Contractor upon presentation of a bill.

#### **General Terms**

Any type of insurance or increase of limits of liability not described above which the Contractor required for its own protection or on account of statute shall be its own responsibility and at its own expense.

The carrying of the insurance described shall in no way be interpreted as relieving the Contractor of any responsibility under this contract.

Should the Contractor engage a subcontractor or sub-subcontractor, the same conditions will apply under this agreement to each subcontractor and sub-subcontractor.

The Contractor hereby waives all rights of subrogation against Okaloosa County and its consultants and other indemnities of the Contractor under all the foregoing policies of insurance.

#### **Umbrella Insurance**

The Contractor shall have the right to meet the liability insurance requirements with the purchase of an umbrella insurance policy. In all instances, the combination of primary and umbrella liability coverage must equal or exceed the minimum liability insurance limits stated in this agreement.