

RESPONSE FOR eRFP NUMBER: 20230007

BOUNDARY AND ANNEXATION STUDY

CITY OF PORT ST. LUCIE, FLORIDA

Wednesday, December 21, 2022 | 3:00 PM

Submitted By:



Contact:

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BOUNDARY AND ANNEXATION STUDY

CITY OF PORT ST. LUCIE, FLORIDA

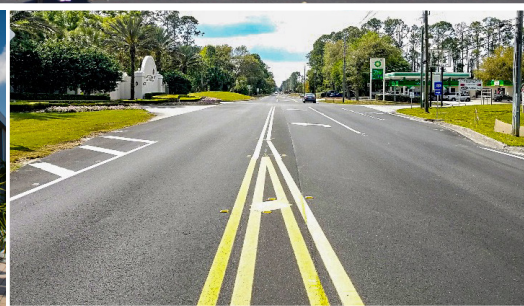
December 21, 2022

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Tab 2 Cover Letter



December 21, 2022



City of Port St. Lucie, Florida
Office of City Clerk
Submitted via DemandStar

Boundary and Annexation Study eRFP (Event) Number: 20230007

Dear Selection Committee Members:

On behalf of GAI Consultants, Inc. (GAI), GAI's Community Solutions Group (CSG) is pleased to present its qualifications to complete a Boundary and Annexation Study for the City of St. Lucie ("City") as described in its recent Request For Proposal (eRFP Number 20230007).

Effectively, the City desires to bring some order and understanding of the ultimate future boundary of the City. As part of that evaluation, the City contemplates a comprehensive evaluation of the community's transportation, utility, and other infrastructure as a means of guiding and directing future growth policy decisions. A study centered on deliberate or strategic annexation has not been done by the City previously. Generally, prior annexations have involved voluntary actions or large projects, both occurring only periodically. In contrast, the currently contemplated effort is a deliberate look at the service, fiscal, and political issues stemming from a strategic growth initiative.

Your eRFP makes clear that your needs are particular to the size and history of your community, and we have honored that discrete set of circumstances and conditions. While there is more to learn, we believe the various options outlined in our approach and budget invite discussion about tailored solutions and focus.

As to our competencies, this submission should amply demonstrate specialized qualifications, experience and skills pertinent to understanding [1] the means by which various large tracts of land and existing enclaves might be brought into the incorporated area, [2] the challenges or benefits realized as the result of purposeful annexation actions, [3] and the application of financial, planning, legal, political and other technical skills to facilitate or support these actions.

To these various points explored in further detail in the accompanying submission:

- We are avid listeners, facilitators, and technicians.
- Quite literally, the professionals comprising the team organized for this work have addressed every aspect of the requested services over their respective careers. These professionals draw from substantive and valuable experience in a variety of community planning initiatives which together comprise the platform for growth management, improved urban service delivery, neighborhood stabilization, and economic development.
- GAI is known for its engineering, capital improvement programming, and design services which are integral to evaluating the condition and capacity of existing infrastructure necessary to supporting various growth alternatives.
- Beyond the planning and engineering disciplines essential to exploring the basic technical and service obligations of annexation, we also provide administrative, financial, and real estate capabilities to address growth or management issues often related with annexation initiatives

- As well as the complete planning and engineering services provided by CSG or GAI internally, we have broadened our team by inviting Kittelson and Associates to support specific transportation issues which may benefit from the technical perspective of those doing only this kind of work.
- A key leadership role will be coordinated by Dr. Richard Levey, AICP, formerly the Chief Administrative Officer for the City of Orlando. During his tenure, Dr. Levey played the key leadership role in annexation studies or management actions which added approximately 20 square miles to the City's incorporated area. He provides extraordinary insight into the strategic, legal, and economic dimensions of pursuing both voluntary and non-voluntary annexations in Florida. Dr. Levey is called upon twice annually by the Florida League of Cities to teach growth management and annexation strategy to newly elected city commissioners/council members.

You'll be among several public clients we currently support in our work. These include general-purpose governments, special districts, agencies, and redevelopment bodies as well as institutions and private entities, both large and small. All have technical or professional needs such as you outline or describe.

Like you, we believe the form, purpose, and performance of the City are directly influenced by the shape and character of its corporate boundaries. The proposed work should advance your understanding of the advantages and disadvantages of purposefully defining and pursuing those boundaries

We look forward to the opportunity to meet with you and to answer any questions you may have

Sincerely,

GAI Consultants, Inc. | Community Solutions Group



Owen Beitsch, PhD, FAICP, CRE
Senior Director, Economic and Real Estate Advisory Services



Peter C. Sechler, PLA, ASLA
Vice President / Principal-in-Charge

Tab 3 Background and Experience

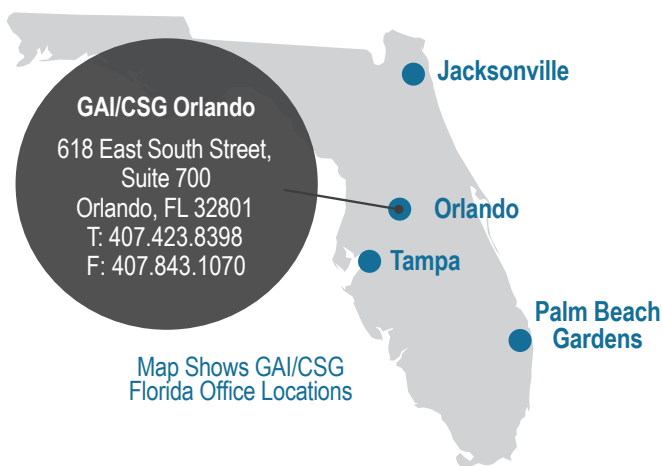
Tab 3 Background and Experience



FIRM INFORMATION

GAI Consultants, Inc. (GAI) is an engineering, environmental, and planning consulting firm. GAI is a wholly owned subsidiary of GAI Consultants Holdings, LLC.

Through growth, acquisition, and much success, GAI has 700+ employees, serving our clients from 24 office locations throughout the Eastern, Midwestern, and Southern United States. Our Orlando office will serve as our main office through which all tasks be coordinated. Our numerous offices are organized to mobilize staff and services seamlessly. GAI has been in business for 64 years and has been practicing in Florida for 40 years.



GAI’s Community Solutions Group

Who We Are. As part of GAI, our specialized Community Solutions Group (CSG) practice combines with the broad knowledge of our engineering and environmental consulting firm to offer services in Landscape Architecture, Planning, Economics, and Management Consulting. CSG is our idea-driven, specially positioned team for landscape architecture, urban planning, redevelopment economics, and wayfinding/environmental graphics. We are committed to enhancing communities in ways that are practical, sustainable, and authentic to our clients’ needs, while being politically aware, financially feasible, and aesthetically compelling. At GAI/CSG, our most successful work has been as a result of the integration of “horizontal infrastructure,” solving technical challenges together in order to create places for people that build value over time.

What We Do. Our work centers on finding resolution to place-based problems by implementing context-sensitive, sustainable solutions that are economically and

financially beneficial and implementable. We engage diverse community groups to effect positive outcomes with shared benefits by integrating ideas. Consequently, our clients include governments, agencies, institutions, and developers who share an equal need to address complex and inter-related challenges. We work from planning to policy and concept to construction across the scales of region, city, and campus; neighborhood, street, and site.

As an art, our practice requires an understanding of the nuances of feasibility, political sensitivity, urban form, relationships, and character of place. But as a science, it involves street geometries and hydrologic flows, floor-area ratios, densities, market economics, and financing mechanisms. We are effective because we are sensitive and sophisticated about implementing complex ideas across the platform of inclusive participation, thoughtful design, funding and finance, public policy, and community partnerships for initiatives both large and small.

Kittelson & Associates

Founded in 1985, Kittelson & Associates, Inc. (Kittelson) is composed of nearly 300 skilled professionals and national experts across 26 offices, allowing us to proudly offer decades of progressive research and technological innovation along with a diverse portfolio of industry-leading work. KAI is at the cutting edge of safety planning both nationally and statewide, leading numerous Vision Zero efforts and working closely with FDOT Central Office staff on improving safety for all vulnerable road users.

Kittelson’s staff is united by collective expertise; our skilled professionals and national experts offer decades of progressive research, technological innovation, and a diverse portfolio of industry-leading work. In Florida, Kittelson is specialized in the integration of land use and transportation, innovative traffic analyses and design, data analytics, multimodal corridor planning and implementation, effective public engagement, transportation management and operations, and regional transportation modeling.

Kittelson holds general planning contracts with MPOs spanning much of South and Central Florida. Kittelson continues to provide GPC services to MPOs all around the country. Some of our most recent work in this capacity has been with your agency, Miami-Dade TPO, Broward MPO, MetroPlan Orlando, Sarasota-Manatee MPO, Space Coast TPO, River to Sea TPO, Ocala Marion TPO, Hillsborough MPO, Fairbanks Metropolitan Area Transportation System, Southwest Idaho MPO/COMPASS, and Bend MPO.

Organizational Chart

GAI Consultants | Community Solutions Group

Kittelson & Associates, Inc. (Kittelson)



Peter C. Sechler, AICP/PLA
Principal-in-Charge

Owen Beitsch, PhD, FAICP, CRE
Project Manager / Lead Economist

Richard Levey, PhD, AICP
Lead Strategist

Adam Burghdoff, PE
Principal Engineer - Transportation

TECHNICAL RESOURCES

PLANNING

Andrew McCown, AICP
Senior Planning Manager

WATER/WASTEWATER

Greg Kolb, PE
Senior Project Manager

FISCAL ANALYSIS

(Cost of Service Delivery)

Laura Smith, MPA, FRA-RA
Financial Analyst Manager
Natalie Frazier, MBA
Senior Project Analyst

TRANSPORTATION

Like Liu, PMP
Senior Engineer/Planner



Owen Beitsch,

PH.D, FAICP, CRE

Project Manager / Lead
Economist

EDUCATION

PhD, Public Affairs, University of Central Florida

Masters of Urban and Regional Planning (MURP), Florida State University

LICENSES/REGISTRATIONS

Fellow, American Institute of Certified Planners (AICP)

Counselor of Real Estate (CRE)

Real Estate License: FL, #SL595584

CERTIFICATIONS

Certified Trainer, Florida Redevelopment Academy

AFFILIATIONS

Affordable Housing Work Group, Florida Chapter of the American Planning Association

American Institute of Certified Planners

Associate Editor, Real Estate Issues

Mayor's Housing Advisory Panel, City of Orlando

Orlando Housing Authority, Commissioner

Orlando Neighborhood Improvement Corporation, Chairman

Palm Beach Economic Council Housing Task Force

The City of Winter Park, Florida, Economic Advisory Board

Dr. Beitsch began his professional career as an analyst for the Tennessee Housing Development Agency (THDA), which at the time was one of the largest housing finance agencies in the U.S., as well as a direct investor in its own multifamily projects. In the years since leaving THDA, his interests have focused on the planning and implementation issues faced by both public and private parties as they develop or manage their real estate holdings in complex urban settings. Dr. Beitsch is presently the Senior Director, Economic and Real Estate Advisory Services, for Community Solutions Group (CSG), GAI Consultants' in-house consulting practice that strategically integrates design, planning, and economics.

Dr. Beitsch's professional interests align with several community and organizational activities. He held a leadership role in the Tampa Downtown Partnership before moving to Orlando, where he became a founding member of the Orlando Neighborhood Improvement Corporation (ONIC). He subsequently served as the organization's chairman for 4 years, then later joined the Orlando Housing Authority, serving on the Board of Commissioners for 8 years. As a resident of Winter Park, Florida, Dr. Beitsch served as assistant chair of the City's Economic Advisory Board, as well as a member of the Planning and Zoning Board; during this time, he also served on other ad hoc committees exploring policy issues for both Orlando and Winter Park. Dr. Beitsch is currently the elected chair of the Xentury City Community Development District, which oversees a major tourist area proximate to Disney World.

Dr. Beitsch was asked to join the Counselors of Real Estate in 1990, a group that focuses on valuation issues and is open only by invitation. He serves on the group's editorial board and was assistant editor of Real Estate Issues, the organization's referred journal. In 2010, Dr. Beitsch was named a Fellow in the American Institute of Certified Planners, the highest honor bestowed in the urban planning profession and awarded to only about 3% of those achieving certification. He was named as an Outstanding Alumnus of the University of Central Florida College of Health and Public Affairs in 2011, and has remained active as a member of the urban planning faculty since 1996.

- **Panama City Beach Downtown Entertainment District Front Beach Road Corridor, Panama City Beach, Florida.** Economic Analyst as part of representation to the City for a period of approximately 6 months in client developer negotiations related to a series of land exchanges and creation of a special district for purpose of implementation.
- **Transit-Oriented Development (TOD), Port Authority of Allegheny County, Pittsburgh, Pennsylvania.** Lead Real Estate Advisor for data collection and analysis associated with urban planning and economic TOD study. (Ongoing)
- **Transportation Funding Analysis, City of Tampa, Tampa, Florida.** Economic Analyst responsible for providing the financial underpinnings supporting the existing trolley system by aligning City goals with appropriate land use and entitlement strategies.
- **Transportation Funding Analysis, City of Orlando, Orlando, Florida.** Economic Analyst responsible for providing the financial underpinnings supporting the downtown circulator system by aligning City goals with appropriate land use and entitlement strategies.
- **Bay County Airport, Bay County, Florida.** Lead Economist. Project included support planning and disposition of Florida's Bay County Airport, allowing capital freed through the transaction to be applied to a substantially larger airport, enhancing the County's goals of economic development.
- **Sebring Airport, Sebring, Florida.** Lead Economist. Project involved providing tax and financial support to Sebring Airport.
- **SR 429 Land Use + Economic Development Study, Cities of Ocoee and Winter Garden, Florida.** Lead Economist for areawide master plan that involved the creation of urban development visions for key sites that can be used to articulate opportunities, explore land use options, and ultimately promote the potential of the area. The visions are supported by concepts for land use and circulation patterns intended to promote improved value, efficient delivery of services, and the ability to capitalize on the unique resources the two communities share.



Richard L. Levey,

PH.D, AICP

Lead Strategist

EDUCATION

PhD, Public Affairs/Governance and Policy Research, 2015, University of Central Florida

MA, Geography/Spatial Analysis of Land Use, 1980, Arizona State University

BA, Geography/Sociology, 1979, Wittenberg University

CERTIFICATIONS

Certified Planner, American Institute of Certified Planners (AICP)

Relevant Training/Courses

Program for Senior Executives in State and Local Government, Harvard University, 1995

AFFILIATIONS

Urban Land Institute (ULI)

International City/County Management Association (ICCMA)

American Institute of Certified Planners (AICP)

Association of American Geographers (AAG)

Leadership Florida Class XIV, 1995

Leadership Orlando, 1990

American Planning Association (APA) Florida Chapter

– Vice President for Professional Development, 1990–1992

– San Felasco Section, Founding Chairman, 1985–1986

– Legislative Policy Committee, 1986

Florida Planning and Zoning Association (FPZA), Secretary-Treasurer, 1987–1989

gaiconsultants.com

Dr. Richard Levey is a municipal policy executive with extensive experience in governmental operations and economic development strategy and execution. An established expert in his field, he has extensive experience serving the Central Florida area.

Dr. Levey served as the City of Orlando’s City Planning Bureau Chief before taking on the role as Chief Administrative Officer (CAO) in 1999. As CAO, he directed the day-to-day operations of Orlando’s full service municipal government while orchestrating an aggressive economic development program that resulted in the rapid expansion of private sector employment throughout the city. Dr. Levey led a workforce of 3,200 employees and managed Orlando’s aggressive annexation program and implementation.

In 2005, Dr. Levey made a shift out of the public sector, taking the position of Director of Entitlements at Donald W. McIntosh & Associates. During his time at this privately held engineering firm, he directed the company’s land entitlement business and managed the processes of obtaining governmental approvals – from conceptualization through detailed permitting – for numerous commercial, residential, and mixed-use projects.

In 2007, Dr. Levey became the Vice President of Lake Nona Property Holdings, LLC (Now Tavistock Development Company). In this role, he directed Lake Nona’s master planning, entitlements, community design, governmental relations, environmental permitting, development permitting, asset management, and community governance programs. Dr. Levey leveraged his extensive background in economic development, public finance, organizational management, and public-private partnerships to help Tavistock attract new employment in all sectors, including healthcare, biotechnology, and medical education. In addition to Lake Nona, he also provided development advisory services to other Tavistock holdings in the U.S and abroad. He currently serves as a Senior Advisor to Tavistock for the 25,000-acre Sunbridge development.

In 2012, Dr. Levey began providing strategic advisory services to local governments and private investors as a private sector consultant. In addition to the Lake Nona Medical City, he has developed plans for the St. Petersburg Innovation District, the Green Cities Miami Health and Wellness District, the Wolf Branch Innovation District in Mount Dora, and the Wellness Way Implementation Plan in Lake County. He is currently managing several strategic land development initiatives for Tavistock in Central Florida.

Dr. Levey has an elaborate public sector network in the State of Florida through his involvement as a Board Member of the Sunshine State Government Finance Commission, and participation in Leadership Florida and Leadership Orlando. A graduate of the Program for Senior Executives in State and Local Government at the John F. Kennedy School of Government at Harvard University, he has lectured at numerous state and national conferences and is currently an Adjunct Instructor with the School of Public Administration at the University of Central Florida.

Dr. Levey serves as an instructor for the Florida League of Cities Institute for Municipal Officials providing training to newly elected Florida city council members in growth management, including annexation policy and implementation.

Dr. Levey received his Ph.D. in Public Affairs and Policy Research from the University of Central Florida. He has a MA in Geography/Spatial Analysis of Land Use from Arizona State University and a BA in Geography/Urban Studies from Wittenberg University.

▪ **Wellness Way Implementation Plan and Strategy (2019 – 2021), Lake County and the City of Clermont, Florida.** Comprehensive Economic Development strategy and development plan for the approximately 15,000-acre emerging growth center in south Lake County. This joint City-County funded project includes detailed steps to create the newest logistics/distribution hub in Central Florida. The project identifies and prioritizes capital improvement funding strategy, as well as changes in City and County ordinances to ensure delivery of infrastructure commensurate with the impacts of development. A progressive set of Design Guidelines was produced to deliver a higher quality and sustainable built environment.

HIGHLIGHTED EXPERIENCE

- **City of Naples City Council Retreat CIP Prioritization and SWOT Analysis (2021- Ongoing).** Retained by the City to organize and execute a City Council retreat designed to build consensus on Capital Improvement Project prioritization for upcoming budget development. Conducted individual interviews with elected officials which framed a digital survey to quantify findings. Process included a SWOT analysis to assist in building a more collaborative governance environment.
- **Instructor for the Florida League of Cities Institute for Elected Municipal Officials (IEMO) (2019 – Ongoing)** Serve as faculty for training of City Commission members throughout Florida. Focus of curriculum is on growth management and strategic decision making. Emphasis includes the relationship between City Commission growth decisions and operational implications on service delivery.
- **UCF Downtown Economic Impact Analysis Project, Orlando, Florida.** Assisted University leadership with preparation for contractual discussions with the City of Orlando regarding property acquisition, entitlements, and development agreement matters.
- **Bi-Cities Land-Use and Economic Development, Winter Garden, Florida.** Provided tactical expertise to ensure that resulting regulatory framework achieved regional economic development objectives.
- **Annexation Strategic Plan, (2017-2019) City of Kissimmee, Florida.** Assisted the City with developing a systematic method for annexation, focusing on high-value targets and the resolution of enclaves. Developed financial models to evaluate practicality of service delivery. Built unique cost comparison model between unincorporated County and City tax and fee structures for property owners' awareness.
- **Clermont Downtown and Waterfront Master Plan, (2014 - 2015) Clermont, Florida.** Comprehensive Economic Development strategy and development plan for the downtown/ waterfront of a growing city in the western suburbs of metro Orlando. Established priorities for capital investment. Currently remain retained by the City to oversee the implementation.
- **Wolf Branch Innovation District Economic Development Strategy, (2018-2021) Mount Dora, Florida.** Developed a comprehensive implementation plan for the newly established interchange at SR 46 and SR 453 (Wekiva Parkway). Provided a new vision for this emerging employment center for the City of Mount Dora and Lake County, Florida. The plan conceives of a mixed-use regional center with residential, commercial, office, and flex/ warehouse land uses. Created comprehensive plan policies and standards, as well as design guidelines for adoption by the two jurisdictions.
- **Lake Nona "Medical City", (2007- Ongoing) Orlando, Florida.** Conceived and managed the planning, design, and execution of an approximately 7,000-acre, mixed-use land development into one of the country's premier employment generators, which had created approximately 4,500 new jobs by 2013. Public and private sector investment estimated at \$2 billion to date. Offsite infrastructure was funded through unique cooperative arrangement with local government.
- **Millenia Mall/Conroy-Windermere and I-4 Interchange, Orlando, Florida.** Tax increment financing of a new, limited-access highway interchange, facilitating establishment of Central Florida's premier high-end regional retail center. Agreements between multiple governmental agencies and the landowner were required to facilitate the project. "Pipelining" of transportation impact fees secured Florida Department of Transportation (FDOT) approvals for mainline improvements to I-4.

Large Scale Public-Private Partnership (P3) Projects

- **Universal Studios Florida/I-4 Interchange, Orlando, Florida.** Provided the requisite underlying credit to support the issuance of tax-exempt bonds to fund the interchange improvement of the Islands of Adventure Theme Park expansion.
- **Lake Nona Boulevard/State Road 417 Interchange, Orlando, Florida.** A "synthetic" tax increment approach that provided for public reimbursement of a portion of the interchange funding to the developer when specific taxable value benchmarks are met.



Laura Smith, MPA, FRA-RA

Fiscal Analysis | Fiscal Analysis Manager

l.smith@gaiconsultants.com | 321.319.3088

Ms. Smith serves as Financial Analyst Manager within GAI’s Community Solutions Group (CSG), where she conducts and oversees the research and analysis of market, economic, and demographic data; commercial, industrial, and multifamily performance indicators; census data; and employment statistics for various products of the firm. Ms. Smith served as a professional municipal planner for 6 years, expanding her expertise to include writing and updating land development codes, development plan reviews, comprehensive plan rewrites and updates, comprehensive plan Evaluation and Appraisal Reports (EAR), Community Redevelopment Agency (CRA) Findings of Necessity (FON), and redevelopment plans.

Ms. Smith is a graduate of University of South Florida, with an MPA in Public Administration and a BA in Political Science. She also earned her master’s certificate in Urban and Regional Planning from the University of Central Florida. She currently serves on the Planning and Zoning Board of Lake County, Florida.

EDUCATION

MURP, Urban and Regional Planning, 2015, University of Central Florida

MPA, Public Administration (Pi Alpha Alpha), 2008, University of South Florida

BA, Political Science, 2006, University of South Florida

CERTIFICATIONS

Certified Trainer, Florida Redevelopment Academy

- » Orange County Parks Growth Analysis, Orange County, Orlando, FL
- » Lakefront Economic Opportunities Evaluation, City of St. Cloud, FL
- » LaVilla Neighborhood Development Strategy, City of Jacksonville, FL
- » Fiscal Impact Analysis, City of New Smyrna Beach, FL
- » Cocoa Lee Wenner Park Financial Feasibility and Market Study, Cocoa, FL
- » Economic Impact Analysis, Osceola Sports Complex, Osceola County, FL
- » Transit-Oriented Development (TOD), Port Authority of Allegheny County, Pittsburgh, PA
- » Osceola Trails Fiscal Impact Analysis, Osceola County, FL

Natalie Frazier, MBA

Fiscal Analysis | Senior Project Manager

n.frazier@gaiconsultants.com | 321.445.8024

Ms. Frazier serves as a Senior Analyst and Assistant Project Manager supporting GAI’s Community Solutions Group (CSG). She takes an innovative approach to presenting key economic development data by providing a snapshot of pertinent economic information through the use of informative, easy-to-read, concise graphics. Her essential duties include delivering insights that educate and influence clients’ economic business decisions; assisting with strategic, economic, and financial planning services; conducting economic and fiscal impact studies; and managing and designing market studies and reports for emerging communities. Natalie is a graduate from the University of Florida where she earned an MBA in Business Administration in 2022, and graduated Cum Laude earning a double-major BA degree in Economics and Political Science in 2018.



EDUCATION

MBA, Master’s in Business Administration, 2022, University of Florida

BA, Economics and Political Science (Double Major; Cum Laude), 2018, University of Florida

CERTIFICATIONS

Spatial Data Science: The New Frontier of Analytics (ESRI MOOC)

- » Economic Impact Analysis, Osceola Sports Complex, Osceola County, FL
- » Atlantic Field Economic and Fiscal Impact Analysis, Martin County, FL
- » Osceola Trails Fiscal Impact Analysis, Osceola County, FL
- » Lake County Economic Impact Study, Lake County, FL
- » Cocoa Lee Wenner Park Financial Feasibility and Market Study, City of Cocoa, FL
- » St. Lucie County Fort Pierce Utility Authority Water (FPUA) Water Reclamation Facility (WRF) Impact Analysis, St. Lucie County, FL



Andrew McCown, AICP

Future Land Use & Zoning Analysis | Senior Planning Manager

a.mccown@gaiconsultants.com | 321.319.3069

Mr. McCown specializes in project management, policy writing, comprehensive planning and evaluation, neighborhood planning, campus planning, entitlement management, public involvement, and technical research. He has led and participated in a broad range of projects, including Comprehensive Plan Amendments and rezonings, Community and Citywide Vision Plans, Neighborhood Plans, hospital campus planning, community college system planning, and a number of large landholder entitlement strategy projects. With his engineering background and extensive knowledge of GIS applications he is able to effectively integrate a practical, technical approach into all areas of planning.

Mr. McCown is highly skilled at organizing and conducting public outreach efforts in support of planning efforts. His outreach activities have included coordinating and implementing charrettes, workshops, and public presentations, and conducting group exercises, leading breakout sessions, and coordinating live electronic polling.

EDUCATION

MS, City and Regional Planning, 2005, Georgia Institute of Technology

BS, Chemical Engineering, 2003, Georgia Institute of Technology

CERTIFICATIONS

American Institute of Certified Planners, #024345

- » Envision St. Cloud Citywide Master Plan, City of St. Cloud, St. Cloud, FL
- » Bartow Citywide Master Plan, City of Bartow, Bartow, FL
- » Packing District Vision, Dr. Phillips Foundation, Orlando, FL
- » SR 429 Land Use + Economic Development Study, Cities of Ocoee and Winter Garden, FL
- » St. Petersburg Innovation District, St. Petersburg, FL

Greg Kolb, PE

Master Utilities Planning | Senior Project Manager

g.kolb@gaiconsultants.com | 321.319.3044

Mr. Kolb is a Senior Project Manager within GAI's Orlando, Florida, Water Group. He manages projects in water supply, treatment, and distribution; wastewater collection, treatment, and effluent disposal; and reclaimed water management. Mr. Kolb has held increasingly challenging roles on various types of water projects—ultimately overseeing tasks such as master planning, studies, permitting, public involvement, preliminary design, final design, and construction phase services. Prior to moving to Orlando, Mr. Kolb served as a Resident Engineer in the Atlanta area, where he managed water and wastewater treatment construction projects ranging in value from \$1.7 million to \$55 million. In recent years, he has served in Program Manager and District Engineer roles providing utility management services to Central Florida clients; presently, Mr. Kolb continues to deliver engineer-of-record (EOR) and project management responsibilities for unique and challenging water and wastewater projects.

- » Enterprise Community Development District (ECDD), Celebration, FL
- » JEA Buckman Street Trunk Sewer Collapse Emergency Repair Design-Build, Jacksonville, FL
- » Cocoa Water Utilities CIP, Cocoa, FL
- » Fairbanks Avenue Sewer and Roadway Improvements, Winter Park, FL
- » Florida Governmental Utility Authority (FGAU) Nassau Amelia Utilities (NAU) Lift Station 27, Fernandina Beach, FL



EDUCATION

MS, Civil Engineering, 2006, Georgia Institute of Technology
BS, Civil Engineering, 2000, Georgia Institute of Technology

LICENSES/REGISTRATIONS

Professional Engineer: FL – 2007, #65759; NCEES – 2006, #29775



Adam Burghdoff, PE

Transportation Engineer | Principal Engineer

aburghdoff@kittelso.com

EDUCATION

BS, Civil Engineering, Western Michigan University

LICENSES/ CERTIFICATIONS

Professional Engineer: FL (#73946), LA (#37495)

Adam Burghdoff’s background in planning and design has contributed to building beneficial multimodal transportation facilities, and he supports transportation projects with local and regional effects. He uses various engineering modeling and design tools, like AutoCAD, FDOT LRE System, Synchro/SIMTraffic, Highway Capacity Software, and CUBE to complete transportation projects throughout Florida that consider the overall transportation system and influence area. With these tools, Adam identifies corridor travel patterns, conducts operational and traffic signal warrant analyses, evaluates access management and site circulation, and creates traffic signal designs, trip generation studies, bicycle/pedestrian feasibility studies, and parking studies. For numerous development projects, he has completed transportation impact analyses which include concurrency applications, developments of regional impact, sector plans, and comprehensive plan amendments.

- » Developments of Regional Impact
- » FDOT District 5 Project Traffic for Project Development and Environment (PD&E) Study and Design
- » US 1 Corridor Planning Study from Kendall Dr. To I-95
- » Envision Alachua Sector Plan Application
- » Babcock St. Project Development and Environment (PD&E) Study; Palm Bay, FL
- » Malabar Road Project Development and Environment (PD&E) Study; Palm Bay, FL
- » River to Sea Transportation Planning General Planning

Like Liu, AICP, PMP

Travel Demand Modeler | Senior Engineer/Planner

lliu@kittelso.com



Trained as a civil engineer, Like Liu has developed deep knowledge and passion for transportation modeling and planning. She led and supported transportation projects by developing travel demand models, forecasting future transportation system dynamics, conducting mesoscopic or microscopic simulations, performing traffic operations analysis, developing mobility performance measures, evaluating network accessibility, estimating transit ridership, and preparing corridor studies. Like has been weaving through observed data and technical analysis to develop succinct project summaries that communicate benefits and costs effectively and clearly to the decision-makers and the public. She also obtained a keen ability to think through and solve complex issues without losing focus on the client interest, big picture, and community values, which results in practical solutions and quick implementations. She is familiar with programming languages such as C/C++, VBA, Python, and Matlab. Like uses her proficiencies in analysis software packages including Cube, Visum, TransCAD, Aimsun, Tranplan, DTALite, Vissim, TransModeler, CORSIM, SimTraffic, Synchro, SIDRA, Vistro, HCS, AutoCAD, MicroStation, ArcGIS, Tableau, Microsoft Access, and SQL Server.

- » Southeast Florida Regional Planning Model 9 Development
- » FDOT FSUTMS Model Conversion Support
- » Central Florida Regional Planning Model 7 Development
- » MetroPlan Orlando Accessibility Modeling and Evaluation
- » 2045 Long Range Transportation Plan Update
- » FDOT District 6 Strategic Miami Area Rapid Transit (SMART) Plan Review
- » NW 154 ST. Area Traffic Study; Miami-Dade County
- » Multiresolution Modeling for Traffic Analysis

EDUCATION

MS, Civil and Coastal Engineering, University of Florida

BS, Transportation Engineering, Central South University, China

LICENSES/ CERTIFICATIONS

American Institute of Certified Planners (#373192)

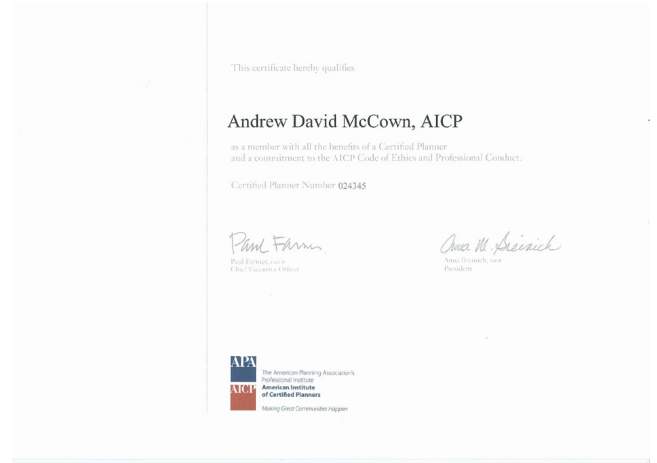
Project Management Professional (#2792625)

NCEES (#19-162-32)

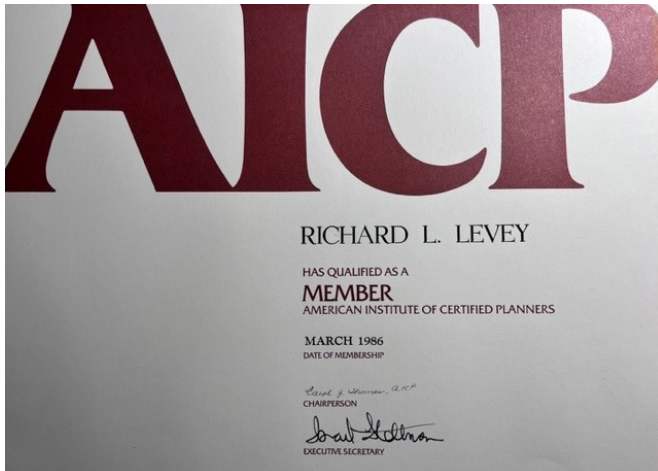
Owen Beitsch, PhD, FAICP, CRE



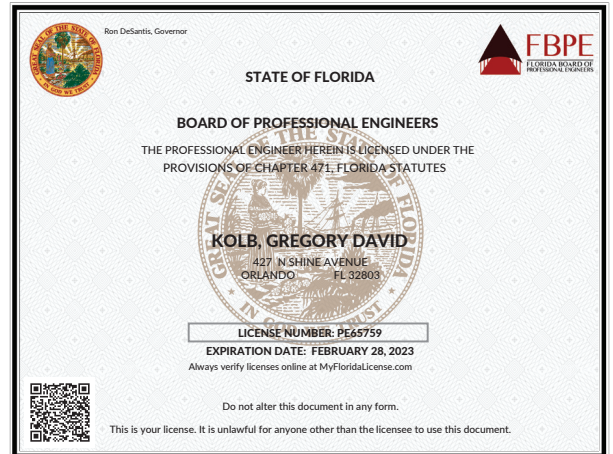
Andrew David McCown, AICP



Richard L. Levey, PhD, AICP



Greg Kolb, PE



Kittelson & Associates, Inc.

Adam M. Burghdoff, PE

Ron DeSantis, Governor

STATE OF FLORIDA

FBPE
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THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BURGHDOFF, ADAM M.
515 EVERGREEN ST
NEW SMYRNA BEACH FL 32169

LICENSE NUMBER: PE73946
EXPIRATION DATE: FEBRUARY 28, 2023

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Like Liu, AICP

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Primary Chapter: FL | Expires 12/31/2022

AICP Membership: Expires 12/31/2022
CM Reporting Period Ends: 12/31/2023
CM Grace Period Ends: 05/31/2024
[AICP Certification Dashboard](#)

APA Engage
[Mentor Match](#)

PASSPORT
[Access Passport](#)

Badges

Tab 4 References





"A City for All Ages"

ATTACHMENT J – PSL REFERENCE CHECK FORM
Proposer Instructions: Fill out top portion only.
(Please print or type)

RFP Number: 20230007
 Title: Boundary and Annexation Study

Proposer/Respondent: GAI Consultants, Inc. | Community Solutions Group

Reference: City of Kissimmee Strategic Annexation Study

Email: belinda.kirkegard@kissimmee.gov Telephone # 407.518.2307

Person to contact: Belinda Ortiz Kirkegard

Reference Instructions: The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and send back to the proposer listed in the box above.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

What is the size of your agency and what services does your agency provide?

Was the work performed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the contractor on a scale of low (1) to high (10) for the following?

Professionalism _____	Final Product _____
Qualifications _____	Cooperation _____
Budget Control _____	Reliability _____

Would you contract with this Consultant again? Choose an item.

Additional Comments:

Thank you.

Signature from Reference: _____

Printed Name: _____

Job Title: _____

Note: Proposer fills out the top box and then submits the form to the Issuing Officer. PSL will send all Reference Checks to the Supplier(s) that are referenced on each Reference Check Form. Proposers shall submit and include all Reference Check Forms fully filled out and completed with their RFP packet by or before the submittal deadline.



"A City for All Ages"

ATTACHMENT J – PSL REFERENCE CHECK FORM
Proposer Instructions: Fill out top portion only.
(Please print or type)

RFP Number: 20230007
 Title: Boundary and Annexation Study

Proposer/Respondent: GAI Consultants, Inc. | Community Solutions Group

Reference: City of Clermont / Lake County Wellness Way Implementation Plan

Email: dgray428@gmail.com Telephone # 352.536.4751

Person to contact: City of Clermont Former City Manager - Darren Gray

Reference Instructions: The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and send back to the proposer listed in the box above.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

What is the size of your agency and what services does your agency provide?

Was the work performed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the contractor on a scale of low (1) to high (10) for the following?

Professionalism _____	Final Product _____
Qualifications _____	Cooperation _____
Budget Control _____	Reliability _____

Would you contract with this Consultant again? Choose an item.

Additional Comments:

Thank you.

Signature from Reference: _____

Printed Name: _____

Job Title: _____

Note: Proposer fills out the top box and then submits the form to the Issuing Officer. PSL will send all Reference Checks to the Supplier(s) that are referenced on each Reference Check Form. Proposers shall submit and include all Reference Check Forms fully filled out and completed with their RFP packet by or before the submittal deadline.



"A City for All Ages"

ATTACHMENT J – PSL REFERENCE CHECK FORM
Proposer Instructions: Fill out top portion only.
(Please print or type)

RFP Number: <u>20230007</u>	
Title: <u>Boundary and Annexation Study</u>	
Proposer/Respondent: <u>GAI Consultants, Inc. Community Solutions Group</u>	
Reference: <u>Panama City Beach Economic and Strategic Studies for CRA</u>	
Email: <u>dsale@handfirm.com</u>	Telephone # <u>850.769.3434</u>
Person to contact: <u>Douglas Sale, City Attorney</u>	

Reference Instructions: The above Proposer has given your name to the City of Port St. Lucie as a reference. Please complete the information below and send back to the proposer listed in the box above.

Describe the scope of work of the contract awarded by your firm/entity to this Consultant. What type of services were performed?

What is the size of your agency and what services does your agency provide?

Was the work performed on time and within the specified guidelines?

What problems were encountered (claims)?

How would you rate the contractor on a scale of low (1) to high (10) for the following?

Professionalism _____	Final Product _____
Qualifications _____	Cooperation _____
Budget Control _____	Reliability _____

Would you contract with this Consultant again? Choose an item.

Additional Comments:

Thank you.

Signature from Reference: _____

Printed Name: _____

Job Title: _____

Note: Proposer fills out the top box and then submits the form to the Issuing Officer. PSL will send all Reference Checks to the Supplier(s) that are referenced on each Reference Check Form. Proposers shall submit and include all Reference Check Forms fully filled out and completed with their RFP packet by or before the submittal deadline.

Tab 5 Approach to Project

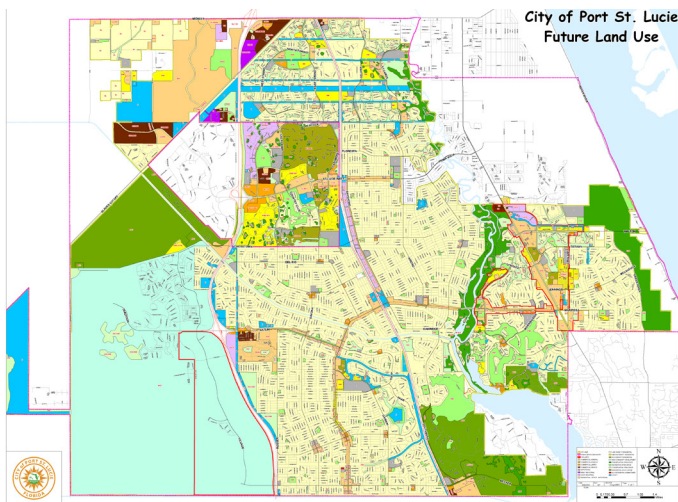
Tab 5 Approach to Project



gai consultants®

**COMMUNITY
SOLUTIONS
GROUP**

OVERALL APPROACH



- The current intergovernmental relationships that exist between the city and its service delivery partners including St. Lucie County.
- The overall community vision of Port St. Lucie, as expressed in the Goals, Objectives, and Policies of the Comprehensive Plan.

Fiscal Impact Analysis – Capital

Assessing the need for capital improvements will be undertaken as part of the evaluation of future potential expansion areas. Working closely with the City's Public Works, Police, Fire, Parks & Recreation, Utilities, and Finance Departments, the CSG team will bring forward capital improvement plans, with cost estimates, to address the City's capital requirements based on planned land uses.

Fiscal Impact Analysis - Operating

This net financial impact is generally based on calculating expected revenues and forecasted expenditures (capital and operating). This requires the use of cost-of-service delivery models for various city services. If the City of Port St. Lucie already has established these metrics, CSG will utilize these in the approach to the project. If the City does not have these metrics, they can be developed in several different ways including cost per unit of service based on households, equivalent residential units (ERU's), acreage, and population to name a few. Our land economists have created models such as these for various local governments and special districts. No one approach fits every set of circumstances. We envision working with the city staff to evaluate the current use of these metrics and choosing the model criteria best suited for this project. Given the potential remote location of the study areas, evaluating the City's metrics for sensitivity to distance and spatial delivery of service will be included in our analysis.

Project Leadership

A successful project requires continual and ongoing communication between the city and the CSG team. Our experience demonstrates having a singular point of contact as a City Project Manager or Liaison can expedite the sharing of information and provide directional guidance throughout the study. This individual can accelerate the City's response to inquiries from the CSG team and can ensure decisions made through the data collection and analysis phases are consistent with the City's desires and

Project Understanding

The City of Port St. Lucie is interested in evaluating the existing City Limits and current service delivery model and then analyzing the opportunity for municipal expansion and its impact on the economic, physical, and fiscal characteristics of the future city. The city should be commended for taking a holistic approach to municipal expansion. All too often in Florida, cities react to unplanned voluntary annexations without understanding the long-term implication of the cost to service delivery and the City's ultimate urban form.

Our approach to the project is likely to differ from that of other firms who have conducted studies that simply evaluate the incremental costs and revenues of potential areas for annexation. Our approach involves sensitivity to the practical and political context in which annexation can legally proceed. Key members of our Core Team have extensive history in municipal operations and strategy at the highest level. It is from this perspective that our project understanding, approach, and scope of services are grounded. Our experience as local government employees responsible for all aspects of annexation, including large-scale, multi-landowner annexation agreements, brings a multi-departmental and coordinated approach to evaluating future municipal boundaries and the implications on capital projects and service delivery.

Policy Framework

A thorough understanding of the following factors is necessary to ensure a successful project outcome:

- A complete understanding of the current municipal service delivery system of Port St. Lucie and adopted levels of service.

result in a more meaningful work product. The CSG team is very experienced in supporting a Staff Steering Committee and believes this model will work well. If possible, the Chair of the Staff Steering Committee should be the City Project Manager for this effort.

Public Participation

A key factor in how the overall project is undertaken is to what level the city wants to include public participation and stakeholder engagement in this work effort. We have worked both ways – as a technical consultant to the city staff without any public participation, and have also managed a comprehensive engagement process on behalf of our public sector clients. This decision will shape the ultimate scope of services and the schedule for the project. Our scope below includes provisions for public and stakeholder engagement, but with the caveat that the City will determine based on its sensitivity and procedural requirements, the merits of these tasks or not. As such, they are identified as “Optional” in the scope of services below. We anticipate that including or not including this component of the project would be established at the very first meeting with the City. If ongoing public participation is desired throughout the project, a Stakeholder Group is recommended with representatives from various interests in the study areas.

Experience

Finally, we bring years of municipal government experience and extensive knowledge and expertise of annexation in Florida, which allows us to become your high-level strategic advisor.

SCOPE OF SERVICES

We view our role not as outside consultants, but as ‘adjunct’ staff embedded within the existing City organization to arrive at an overall strategy that is fiscally sound and politically practical. We will work side-by-side with department directors and City administration to ensure that the city has a realistic blueprint for advancing its potential municipal expansion program.

The effort outlined is dynamic. Consequently, several tasks listed or referenced sequentially may actually occur at the same time. Others will be iterative as more data and input are generated.

In any case, our first task will be to meet with the City Manager and key staff leaders, to determine or affirm the primary drivers for this work effort. We have a keen understanding of the importance of annexation to the fiscal, economic and social health of the city. However, cities go through cycles where annexation evolves in importance to the administration. Gaining a complete insight into the factors raising the importance of annexation for Port St. Lucie today is critical to our success and the ability to deliver the right type of analysis for you, our client.¹

Based on our understanding of the project requirements and criteria provided to date by the City, CSG proposes the following Scope of Services:

Part 1: Project Governance and Initiation

1. Kickoff – The kickoff is envisioned as a CSG Team/City Staff workshop to confirm our approach to the project.

We will establish:

- a. **History & Strategy** – Meeting with key staff leaders to understand the City’s history of annexation and what are the current drivers of this project
- b. **Project Management** – Our shared management approach for the project, focusing on key people, schedule, data gathering, and other logistics. Establish the form and structure of the Staff Steering Committee and establish a schedule for full committee meetings as well as protocol for communication during the project
- c. **Project Objectives** – Key planning objectives, current/immediate development activities and other factors requiring special consideration, including an overview summary from the various City departments relevant to this project.
- d. **Public Engagement** – Determine the level of public involvement, if any, including whether a public Stakeholder Group is desired. If so, the project schedule can be expanded to include ongoing stakeholder engagement. Stakeholders for a project like this could include large landowners, private sector land planners and engineers, community interest groups, and environmental groups. Intergovernmental representation should also be considered, including the School Board, County government, or any appropriate Special District(s) in the study areas. If a formal Stakeholder Group is not desired, an understanding of how best to engage the School Board during the project will be discussed with the staff at the Kickoff

meeting. (Tab 7 – Public Outreach, further explains the three options for public engagement for our proposed scope of services)

e. Trends in Growth and Development – Review of recent development trends and key Comprehensive Planning issues that are facing the City, including a discussion of the City’s capital improvement program that could benefit/impact the financial implications of City expansion.

f. Intergovernmental Coordination – Identify the status of any current agreements with St. Lucie County, the School Board, Water Management District or Special Districts and their potential impact on the project.

g. Define Study Area Boundaries – In a collaborative effort, CSG and the City staff will establish criteria for determining the study area boundaries for data collection purposes.

h. Area Tour – An initial “windshield” tour with key staff to gain initial insight into the overall character of the study area.

2. Team Meetings – CSG will plan for regular Staff Steering Committee meetings to address the ongoing management and coordination of the project. Communication between CSG and the City will be continuous throughout the project. Staff Steering Committee meetings will be utilized to reach consensus on key project decision points and direction.

Deliverables

Meeting Notes, Communications Approach, launch and maintain communications platform.

3. Public Kickoff Event (Optional) – Should the City choose to include the Stakeholder Group option for public engagement, CSG will conduct a public kickoff event with the Stakeholder Group to introduce the project and define the role of the Group.

Part 2: Discovery

1. Data Collection – Existing Conditions Analysis

a. Base Mapping – Establish base mapping data by study area. Parcel level data elements to be collected include:

1. Tax-Parcel ID
2. Owner Name
3. Property Name
4. Parcel Size
5. Mileage Codes
6. Register Electors
7. Property Exemption Codes
8. Land Market Value
9. Building Market Value
10. Total Market Value
11. Total Assessed Value
12. Total Exemption Value
13. Total Taxable Value
14. Total Taxes
15. Non-Ad-Valorem Revenue

The data is sourced primarily from the St. Lucie County Property Appraiser. Identification of the presence of registered electors is obtained through the St. Lucie County Supervisor of Elections.

b. Infrastructure Mapping – CSG will acquire and compile all available infrastructure data from St. Lucie County and the City to understand the location of water, sewer, reclaimed water, gas, electric, and telecom infrastructure. While not all of these services are provided by the city, understanding the complete infrastructure picture in each area is important in determining candidate areas for annexation. CSG will acquire all available information on the condition of this infrastructure from service providers.

c. Future Land Use and Zoning Analysis – Maps and narratives explaining the current St. Lucie County Comprehensive Plan FLU designations and zoning districts as applied to the study area(s) will be created. A preliminary overview of the opportunities and constraints that are created by these current designations and their impact on the City’s vision for its future will be provided.

d. Existing Transportation Network Analysis and Review – The CSG Team will summarize readily available volume-to-capacity (v/c) ratios and level of service (LOS) data from the City and County to develop baseline maps and tables for the purposes of preparing the future thoroughfare network. Multimodal network elements (sidewalks, bike routes, transit routes) will also be mapped on the thoroughfare network.

Optional Task – In the event, the v/c and LOS data are not readily available, the CSG Team will collect traffic count data from the City, County, and FDOT to prepare a generalized level of service roadway analysis for existing thoroughfares within the City. Volume-to-capacity (v/c) ratios and levels of service (LOS) for existing thoroughfares will be summarized in tables and maps.

e. Travel Demand Model Review – The CONSULTANT will review the latest version of the Treasure Coast Regional Planning Model, Version 5.0's (TCRPM5) coded land uses for consistency with future land use and zoning. The TCRPM5 model network will also be reviewed against the City and County comprehensive plans for consistency. No model updates are assumed within this task

Optional Task – In the event model land use and network updates are required to be consistent with the comprehensive plans, the CONSULTANT will prepare the updates.

f. Master Utility Plan Analysis – The CSG Team will review the existing utility service area boundaries and Master Utility Plans in place to determine ability of water and wastewater utilities to service the expansion area of the City of Port St. Lucie.

Stakeholder Meetings – CSG will schedule and attend Stakeholder meetings as identified by the city (Optional).

Deliverables:

1. Study area maps with parcel level data tables. Revenue data will be summarized by small study area boundaries as previously determined by the City and CSG.
2. An evaluation of the state of infrastructure in each small study area and an identification of what improvements would be necessary to meet the City's adopted levels of service.
3. Meeting documentation and notes as appropriate.

2. Data Collection – Costs

a. Cost of Service Delivery Model – CSG, in collaboration with the City's Finance Director and Budget staff, will establish the most appropriate methodology to create cost of service models for each of the municipal

services provided by the City. In lieu of creating these models, CSG will rely upon existing City metrics for cost-of-service delivery if appropriate. Modifications may be proposed by CSG if the existing City metrics do not accurately reflect the cost-of-service delivery given the distance from the existing city boundaries.

Deliverables:

1. A summary table of the cost-of-service metrics to be utilized for municipal service delivery in the study area(s)

3. Future Annexation Analysis

a. Future Land Uses – CSG recommended Future Land Use (FLU) designations and assumptions about buildout program of residential and non-residential development. These recommendations will come after direction from the Staff Steering Committee and input from the public engagement process on the future character of the study area(s).

b. Initial Travel Demand Model Run and Analysis – Following review and adjustment of the model, a baseline model run will be completed to forecast buildout traffic volumes on the thoroughfare network. Future traffic volumes will then be analyzed to identify future v/c ratios and LOS. Baseline future v/c ratios and LOS will be summarized in tables and maps. This is expected to identify the vehicular operating conditions of the established thoroughfare network.

Optional Task - Following review and adjustment of the model, a baseline model run will be completed to forecast buildout traffic volumes on the thoroughfare network. Up to 3 alternative model scenarios will also be developed to capture an alternative future land use vision as provided by the City. Future traffic volumes will then be analyzed to identify future v/c ratios and LOS. Baseline future v/c ratios and LOS will be summarized in tables and maps. This is expected to identify the vehicular operating conditions of the established thoroughfare network with the baseline and three alternative land use plans.

c. *Cost of Service Delivery Estimates* – CSG will utilize the cost-of-service delivery metrics to assign overall costs to serve the study area(s) based on the FLU designations and buildout program. Any cost of operations arising from any needed capital will be included in these summaries.

d. *Capital Improvement Plan* – establish capital improvement plans with cost estimates for the study area based what is needed to support the buildout development program. Operating expenses associated with the capital improvements will also be established.

e. *Cost Allocation* – should any required capital improvements and its related operating expenses be applicable to more than one study area, CSG will reasonably allocate those costs in the final cost-revenue analysis. This will ensure that the fiscal analysis for each study area can stand on its own.

f. *Cost Comparison with Unincorporated Properties* – to fully understand the financial impacts to property owners as a result of annexation, CSG will pick a range of property types to do a comparison of overall costs pre- and post-annexation. This information can be useful in promoting annexation with unincorporated property owners, especially in enclave areas.

Deliverables:

1. *Cost analysis summaries the study area(s).*
2. *Study area maps with identified deficiencies in infrastructure.*
3. *Study area maps with needed capital improvements.*
4. *Cost comparison analysis of pre- and post-annexation costs to various types of properties (commercial, industrial, residential, etc.).*

Part 3 – Synthesis

1. Cost-Revenue Analysis

a. *Preliminary Findings* – CSG will compile the revenue and cost data to illustrate the net fiscal impact of the entire study area as well as specific targeted areas as identified by the Staff Steering Committee. This analysis will focus primarily on ad valorem revenue.

b. *Capital Improvement Requirements* – CSG will summarize the needed capital infrastructure and public facilities necessary to support the expansion of the City of Port St. Lucie’s municipal boundary. A preliminary

revenue analysis based on projected impact fee revenue from the buildout program will be included.

c. *Thoroughfare Plan Development* – The output of the Discovery Stage will inform the development of the Thoroughfare Plan. Vehicular travel demands and impacts will be quantified and summarized in maps and tables. Roadways with unacceptable v/c ratios or levels of service will be identified for improvement by adding lanes or parallel network.

Optional Task: *Vehicular travel demands may have the potential to be offset by incorporating multimodal elements into the thoroughfare plan. This strategy may include the improvement of existing roadways (additional general purpose lanes, managed lanes, enhanced transit options, development of new roadways or parallel roadway network, or green multimodal facilities (trails, bike lanes, cycle tracks, sidewalks, etc.). The benefit from each strategy will be quantified and future conditions will be evaluated for the improved thoroughfare network. Mitigation strategies will within the thoroughfare network will be summarized within a mapped thoroughfare plan.*

2. Strategic Analysis

a. *Implementation Strategy* – CSG will provide strategic and tactical recommendations for annexation of the entire study area boundary, differentiated by best approach – voluntary (Chapter 171.044, F.S.), non-elector referendum (Chapter 171 (6), F.S.) or residential referendum for enclaves with registered electors (Chapter 171.046, F.S.). This will include determinations of feasibility and practicality of annexation.

b. *Future Land Use/Zoning* – CSG will recommend land use classifications and zoning districts for the study area(s) including a compatibility assessment of the proposed FLU designations for the potential annexations with adjoining FLU and zoning designations on lands already within the City.

Deliverables:

1. *Cost-Revenue analysis summaries for the study area(s) with detail on sub areas identified by the Staff Steering Committee.*

2. Strategic and tactical recommendations for those small study areas determined to be feasible and practical for annexation, including future land use, zoning and capital improvement recommendations.

Part 4 – Review of Strategic Analysis

a. Draft Analysis – CSG will produce a draft of the Strategic Analysis report and a PowerPoint presentation summarizing the findings of the study to be delivered to the Planning Department for the first level of review. This will include discussion of the purpose and intent of the study and the importance of annexation to the future of the City of Port St. Lucie. It will merge the cost-revenue analysis and the land use regulatory review for the study area(s) to create a composite view of the potential and practicality of annexation. The report will include action steps necessary for the city to move forward on a prioritized list of potential annexation areas. The analysis and report will identify the specialized tactical recommendations for each. As well as needed comprehensive plan amendments and re-zonings. This draft analysis will also be presented to the Staff Steering Committee for their review, edit and comment. Should the City elect to have a Stakeholder Group, CSG would present the draft analysis to that body as well.

b. City Council Workshop – CSG shall present the analysis to the City Council at a workshop meeting to derive comments and direction from the Council

Deliverables:

1. A draft Strategic Analysis report and summarizing the project in an acceptable pdf form to the city.
2. A PowerPoint presentation to be used to present to the City Council in a workshop meeting.

Part 5 – Final Boundary and Annexation Study Report

Deliverables:

1. CSG will prepare a final Boundary and Annexation Study Report based on the various comments and direction provided through the review of the draft Strategic Analysis report. This report will contain an Executive Summary. The report will be styled to satisfy the pre-requisite to annexation as required by Chapter 171.042 F.S.
2. CSG will provide a powerpoint presentation of the final Boundary and Annexation Study Report to the Planning Department.
3. CSG will present the Final Boundary and Annexation Study Report to the City Council in a workshop meeting.

¹Generally, the work and full approach articulated conforms to the sample contract you provided. As to that document, GAI/CSG acknowledges the proposed form proffered, contingent upon normal and customary diminimus edits between a city and a prospective consultant.


Tab 6 Timetable



TIMETABLE

Week (from Notice to Proceed) | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 |

Task 1: Project Governance and Administration

Staff Steering Committee																							
Stakeholder Group (Option 1)																							
Stakeholder Interview (Option 2)																							

Task 2: Discovery

Data Collection - Existing Conditions Analysis																							
Existing Transportation Network Analysis Option																							
Initial Travel Demand Model Review Analysis Option																							
Data Collection - Cost																							
Future Annexation Analysis																							
Initial Travel Demand Model Run Analysis Option																							

Task 3: Synthesis


Cost of Revenue Analysis																							
Thoroughfare Plan Development Option																							
Strategic Analysis																							

Task 4: Review of Strategic Analysis

Draft Analysis/Report																							
City Council Workshop																							

Task 5: Final Boundary and Annexation Study Report

Final Report																							
City Council Workshop																							

Kick-off Meeting 

Report Deliverable 

Tab 7 Public Outreach



PUBLIC OUTREACH



Public Outreach/Public Engagement

It is understood that the City desires a public outreach component of the project to engage various stakeholders. The level of public engagement can range from basic outreach to a very extensive engagement program. There are several ways to approach this issue. CSG has outlined a basic approach with 2 options:

- **Basic Approach. Public Outreach** – The approach is an information sharing effort designed to make the progress of the project available electronically to the public. Components would include creating a project link on the City’s homepage and posting of the progress of the project via Staff Steering Committee meeting minutes and interim work products. This level of outreach would include an advertised community meeting with the City sending notices to each property owner in the study area(s).
- **Option 1. Stakeholder Group** – In addition to the public information link on the City’s homepage, this effort would include the establishment of a Stakeholder Group which would be comprised of large landowners, private sector land planners and engineers, community interest groups, and environmental groups. Intergovernmental representation should also be considered, including the School Board, County government, or any appropriate Special District(s) in the study area(s). The Stakeholder Group would have an established

schedule and its agendas would be to report the progress of the project, the direction established by the Staff Steering Committee, and to take comment on matters of interest to the Group. Four Stakeholder Group meetings are included in this option.

Should the City choose the Stakeholder Group option program, the GAI team would be responsible for attending each Stakeholder Group meeting and be responsible for agenda preparation and the content to be delivered at the meeting. The city would be responsible for facilitating the meeting location and distribution of meeting materials to the Stakeholder Group. A master calendar of Staff Steering Committee and Stakeholder Group meetings would be prepared to coincide with the project schedule.

- **Option 2. Stakeholder Interviews** – In lieu of the Stakeholder Group Option, CSG would interview a select number of key Stakeholders at the outset of the project. The key Stakeholder would be identified by the City and a representative of the City staff could participate in these interviews. CSG would set aside a day at the outset of the project, after the kickoff with the city staff, to conduct these interviews. It would be expected that the findings of these interviews would yield important landowner objectives and help frame the ultimate boundary expansion strategy. This would be far more cost-effective than the Stakeholder Group Option.

Tab 8 List of Similar Projects

Tab 8 List of Similar Projects



LIST OF SIMILAR PROJECTS

The studies listed below encompass the following kinds of competencies, skills, knowledge, expertise, or applied insights. More specific references from the selected project are found in TAB 4.

Project	Percent Completeness	Primary Consultant/ Lead	Other Team Members Assigned
City of Kissimmee Strategic Annexation Study	100%	Richard L. Levey, Ph.D., AICP	N/A
City of Clermont/Lake County - Wellness Way Implementation Strategy	100%	Richard L. Levey, Ph.D., AICP	Blake Drury, AICP
Martin County, residential capacity analysis	50%	Laura Smith, MPA, FRA-RA	Natalie Frazier, MBA Owen Beitsch, PhD, FAICP, CRE
City of St. Cloud Enclave and growth analysis	100%	Blake Drury, AICP	Andrew McCown, AICP Laura Smith, MPA, FRA-RA
City of Inverness Annexation analysis	100%	Owen Beitsch, PhD, FAICP, CRE	Laura Smith, MPA, FRA-RA
Panama City Beach, Fiscal Analysis	100%	Owen Beitsch, PhD, FAICP, CRE	Laura Smith, MPA, FRA-RA Natalie Frazier, MBA
Osceola County Economic Impact	100%	Natalie Frazier, MBA	Laura Smith, MPA, FRA-RA Owen Beitsch, PhD, FAICP, CRE
City of Panama City Downtown North Community Redevelopment Area Boundary Expansion(s)	100%	John M Jones, AICP, FRA-RP*	N/A
City of Groveland Annexation Strategy	100%	John M Jones, AICP, FRA-RP*	N/A
Expansion of Dade urban service boundary	100%	Owen Beitsch, PhD, FAICP, CRE	Richard L. Levey, Ph.D., AICP
Four Corners, Collaboration among Polk, Orange, Osceola and Lake for services	50%	Tom Kohler	Laura Smith, MPA, FRA-RA Natalie Frazier, MBA Owen Beitsch, PhD, FAICP, CRE
City of Orlando Southeast Sector Implementation Plan and Annexation*	100%	Richard L. Levey, Ph.D., AICP	N/A

* Project completed with prior firm

** Not within 5 years but significant relevant project

Your RFP, while clearly focused on an annexation strategy, speaks to a wide range of skills, experience, and analytical undertakings necessary to think productively and efficiently about matching community needs and service delivery. These are broad public administration needs or challenges common to many of our team’s largest projects and several continuing service agreements with our local government clients.

To these points, we have listed above several examples of studies as you requested, centering on annexation procedures particularly, while also including others to underscore our experience in planning, economics, use of statistical and other proprietary or published data, program management, fiscal, transportation, and related development or infrastructure matters pertinent to your stated requirements. We are pleased to discuss these, and others of a comparable nature requiring the knowledge or disciplines you are requesting for the current assignment.

Need Skills	Richard Levey	Owen Beitsch	Adam Burghdoff	Laura Smith	Natalie Frazier	Andrew McCown	Greg Kolb
Cost of service delivery for existing and new development	●	●		●			
Preparation and management of operating and capital budgets	●						
Municipal vs unincorporated cost analysis	●	●		●	●		
Transportation network condition and network analysis; Thoroughfare Plan			●				
Developing long range capital improvement program	●		●	●			●
Master Utilities Planning	●					●	●
Preparation of benchmark studies		●		●	●		
GIS Parcel level mapping							
Revenue analysis	●	●		●	●		
Budgetary analysis	●	●		●	●		
Incentives and economic development strategies	●	●		●			
Fees and assessment programs for services and capital		●		●	●		
Managing public participation	●		●	●			
Comprehensive or other plan updates, typically including assessment of infrastructure deficiencies	●	●	●	●	●	●	●
Providing projections of tax or other tax program receipts		●		●	●		
Fiscal and economic analysis		●		●	●		
Financial evaluation of the City’s budgetary process and capital spending	●	●		●			
Fiscal policy analysis	●	●		●	●		
Public Safety (Police and Fire) Service Planning	●						
Enclave analysis	●	●				●	
Inter-local agreements	●						
Staff coordination	●			●			

Project profiles are provided for selected items listed in the pages above.
 Specific profiles correspond to the references in TAB 4

Project Profile

Client:
 City of Kissimmee

Project Team:
 - Richard Levey

Services:

- Economic + Strategy
- Economic Development
- Public Infrastructure Planning + Finance
- Municipal Service Delivery

Completion Date:
 2018

Construction Cost:
 N/A

CITY OF KISSIMMEE ANNEXATION STRATEGIC PLAN

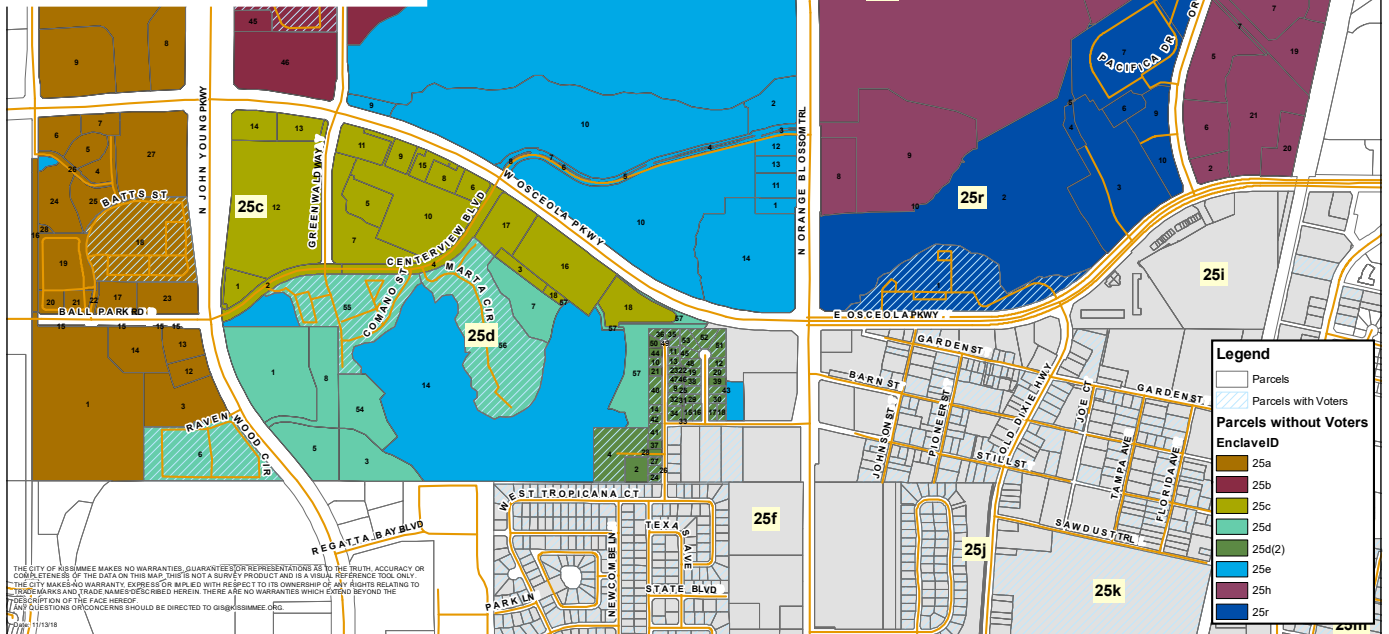
Kissimmee | Florida

The City desired to address two long standing objectives with their municipal boundaries – the existence of enclaves, and expansion to incorporate high value commercial properties in the adjacent unincorporated Osceola County. Levey was retained to develop the strategy and assess the financial and operational impacts of implementation. Levey coordinated a working group of departmental representatives to provide input and feedback in the plan development process.

A comprehensive evaluation of every parcel in 26 target areas was conducted to understand potential revenues and service delivery impacts to the City. Using multiple tools available under the Florida Statutes, Levey demonstrated the most viable methods for annexation. The result was a strategic plan for annexing all enclaves and future targeted unincorporated lands. In 2020, The City successfully annexed all enclaves via an inter-local agreement with Osceola County.

Updated Taxable Value & Registered Electors

Sub-area	2017 Est. Taxable Value	2018 Est. Taxable Value	2018/2017 Est. Taxable Value	2017 Registered Electors	2018 Registered Electors	Change in Registered Elector
25a	\$ 77,254,416	\$ 73,717,282	\$ 9,537,334	0	2	2
25b	\$ 57,295,104	\$ 76,876,610	\$ 19,581,506	187	314	127
25c	\$ 26,318,404	\$ 42,771,890	\$ 6,453,486	0	0	0
25d	\$ 56,884,624	\$ 79,028,070	\$ 23,143,446	731	728	-3
25e	\$ 43,196,700	\$ 56,948,955	\$ 13,752,255	0	0	0
25f	\$ 41,572,781	\$ 41,976,589	\$ 403,808	1315	1305	-10
25g	\$ 2,762,814	\$ 2,065,773	\$ 697,040	2	2	0
25h	\$ 28,362,459	\$ 48,968,433	\$ 20,605,974	0	0	0
25i	\$ 4,398,801	\$ 20,295,493	\$ 15,896,692	23	20	-3
25j	\$ 14,719,803	\$ 15,204,889	\$ 485,086	438	436	-2
25k	\$ 13,758,054	\$ 42,094,244	\$ 28,336,190	9	7	-2
25l	\$ 19,607,124	\$ 21,517,698	\$ 1,910,574	269	279	10
25m	\$ 7,436,538	\$ 8,619,217	\$ 1,182,679	222	233	11
25n	\$ 3,393,618	\$ 3,653,433	\$ 260,815	86	88	2
25o	\$ 1,176,102	\$ 1,293,861	\$ 117,759	25	31	6
25p	\$ 11,978,399	\$ 19,858,543	\$ 7,880,144	407	394	-13
25q	\$ 14,663,187	\$ 17,075,895	\$ 2,412,708	89	81	-8
25r	\$ 19,370,500	\$ 14,976,940	\$ 4,393,560	125	151	26
25s	\$ 731,700	\$ 876,179	\$ 144,479	6	3	-3
Total	\$ 474,679,148	\$ 681,924,972	\$ 207,245,824	9415	10,074	1,659



Project Profile

Client:

Lake County
City of Clermont

Project Team:

- GAI's Community Solutions Group

Services:

- Project Administration
 - Stakeholder Process
- Economics + Strategy
 - Economic Development
 - Development Strategy
 - Public Infrastructure Planning + Finance
- Urban Design + Planning
 - Comprehensive Planning
 - Community Development

Completion Date:

2021

Construction Cost:

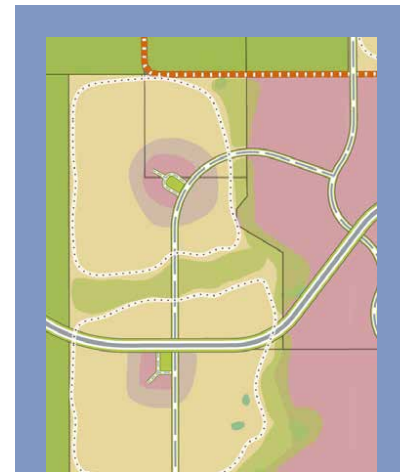
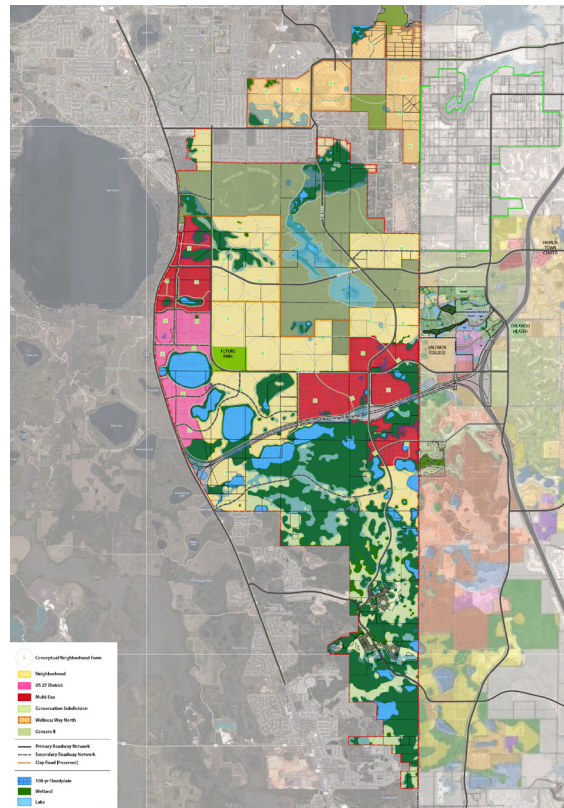
N/A

WELLNESS WAY IMPLEMENTATION PLAN

Lake County | Florida

Lake County and the City of Clermont jointly funded the project to develop an Implementation plan for this +/- 15,000-acre area in south Lake County. An existing Wellness Way Plan required implementation expertise to bring the plan to life. Working with a diverse group of stakeholders – landowners, developers, environmentalists, public agency representatives and leadership from the City and County – Levey developed the requisite strategies and tactics to jump start higher quality development.

The resulting implementation plan established a new future land use framework and associated design guidelines which “raises the bar” on the quality of the built environment, while preserving broad areas for open space and conservation. Detailed neighborhood design requirements call for extensive neighborhood green spaces and parks, as well as a network of trails that connect neighborhoods to the regional trail system.



Components of Urban Form in Wellness Way

- **Center:** place with employment as a central purpose, with ancillary residential and service uses.
- **Residential:** Neighborhoods organized around a single standard pedestrian-shed of about 1/2-mile diameter - center of the neighborhood should have an important traffic intersection associated with a civic or commercial use with higher density housing.
- **Open Space:** Connective organizing structure for community - these should link the park system to Centers and the larger network of Wellness and Green Spaces.
- **Framework Roadways:** Major connections to the regional network feeding Centers.
- **Neighborhood Connectors:** Livable street network joining neighborhoods.

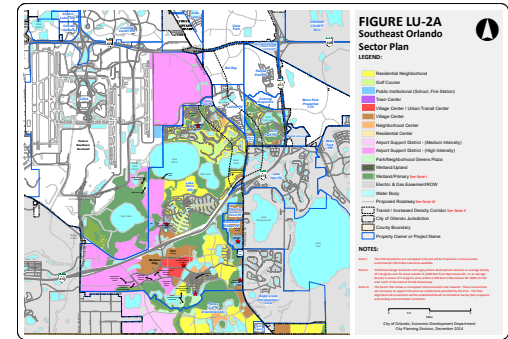
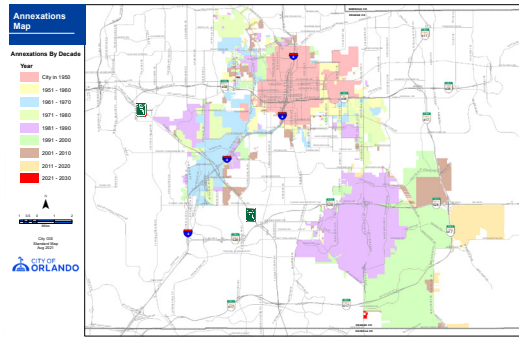
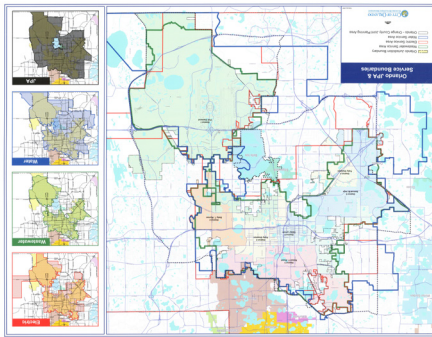
Project Profile

Client:
City of Orlando

Project Team:
– Richard Levey

CITY OF ORLANDO SOUTHEAST ORLANDO SECTOR PLAN

Orlando | Florida



The Southeast Orlando Sector Plan is one of the largest urban planning and development projects ever undertaken by the City of Orlando. The area covered by the plan consists of more than 19,300 acres located east of the Orlando International Airport. The plan area includes Lake Nona, Medical City, East Park, and other neighborhoods.

The pre-cursor to the plan was an extensive multi-landowner annexation program headed by then Deputy Director of Planning and Development Richard Levey, Ph.D., AICP. The project included the evaluation of the master infrastructure required by the expansion of the municipal boundaries. A capital plan, which addressed the requisite roadway, stormwater, potable water, wastewater, reclaimed water, electric power, schools, parks, fire and police facilities was adopted by the City and the Orlando Utility Commission. It was the largest single annexation of greenfield property ever undertaken by the City of Orlando.

The project had to respect the inter-local nature of service delivery between Orange County and the City of Orlando. The project resulted in annexation of some unincorporated properties that are located within the Orange County Utilities service territory. Dr. Levey forged new policies between the City of Orlando and Orange County to allow for incorporation of lands into the City that would have water, wastewater and reclaimed water service provided by Orange County.

The area is now home to more than 5,000 high-value, high-wage jobs in the clinical medicine, medical research, and commercialization of medical research sectors. This includes the University of Central Florida College of Medicine, Nemours Childrens Hospital, Orlando Veterans Administration Medical Center. The annexed area has become the fastest growing non-tourism employment center in central Florida.

Project Profile

Client:

Panama City and Panama City Beach

Project Team:

- GAI's Community Solutions Group

Services:

- Project Administration
 - Stakeholder Process
- Economics + Strategy
 - Economic Development
 - Development Strategy
 - Public Infrastructure Planning + Finance
- Urban Design + Planning
 - Comprehensive Planning
 - Community Development

Completion Date:

Xxxxx

Construction Cost:

N/A

PANAMA CITY AND PANAMA CITY BEACH PROJECTS

Bay County | Panama City, Florida and Panama City Beach, Florida

CSG has maintained a continuing relationship with Panama City and Panama City Beach—two panhandle communities that have had different approaches to their redevelopment objectives. CSG staff have specific expertise in addressing the planning, real estate, and financial advisory services to support these cities' complex implementation strategies. Through our general and special counsel, we have advised on a series of public-private redevelopment initiatives centered on a mix of non-residential land uses that required extensive real estate expertise for application to problems. A recent assignment, centered on downtown Panama City, is involving negotiation with a private developer seeking to take down about 20 acres of City-owned property to advance a plan that includes

hotel, retail, multi-family, and entertainment uses. In addition to destination commercial uses, the City's acreage is being used to leverage incremental development on the privately controlled adjacent property. Aside from the usual complexities of dealing with various development and market issues facing most projects, this venture requires a specified, non-subordinated ground lease; uses are expected to include about 300,000 GSF oriented to a revitalized marina when completed. In the case of Panama City Beach, there are now about 1,000,000 SF of retail development operating on a ground lease with the expectation that development in Panama City could be implemented under similar terms.



Tab 9 Cost Breakdown

Tab 9 Cost Breakdown



COST BREAKDOWN

Major Task	Fee	Optional Fee	
		Public Engagement	Transportation
1. Project Governance and Administration	\$28,104.00		
Stakeholder Group (Option 1)		\$13,080.00	
Stakeholder Interview (Option 2)		\$4,000.00	
2. Discovery			
Data Collection - Existing Conditions Analysis	\$24,672.00		
Existing Transportation Network Analysis Option			\$6,000.00
Initial Travel Demand Model Review Analysis Option			\$4,000.00
Data Collection - Cost	\$5,184.00		
Future Annexation Analysis	\$33,824.00		
Initial Travel Demand Model Run Analysis Option			\$6,000.00
3. Synthesis			
Cost of Revenue Analysis	\$14,160.00		
Thoroughfare Plan Development Option			\$6,000.00
Strategic Analysis	\$17,960.00		
4. Review of Strategic Analysis			
	\$14,976.00		
5. Final Boundary and Annexation Study Report			
	\$7,260.00		
Total	\$146,140.00	\$17,080.00	\$22,000.00

Tab 10 Resources



RESOURCES

Identification of what resources the consultant will require from the City.

The CSG Team will require the City to provide:

- meeting room(s) for any Staff Steering Committee or optional Stakeholder Group meetings,
- copying of meeting/workshop agendas and materials for attendees,
- mailing of any public notices to property owners if required by the City,
- facilitate electronic ability of consultant to present information in meetings or workshops from consultant's laptop computers.

Tab 11 Additional Task

Tab 11
Additional Task



ADDITIONAL TASK

Identification of any additional tasks that are not identified in this Request for Proposals but are recommended by the respondent along with relevant justification thereto.

The GAI/CSG Team has identified two groups of additional tasks that are listed as Optional in Tab 5 Approach to Project:

1. Optional Public Outreach (also described in Tab 7)

CSG offered additional public outreach tasks that would enhance the inclusion of public comment and opinion, should the City desire to do so. Option 1 is the inclusion of a Stakeholder Group that would be conducted during the project. This group could be comprised of interested parties - landowners, developers, development professionals, and community and environmental groups. A second option for public engagement could include interviews with selected stakeholders at the outset of the project. The description of these options is included in Tab 5 - Approach to Project and the cost of Option 1 is listed in Tab 9 - Cost Breakdown.

2. Optional Transportation Planning & Modeling Tasks

There are four optional tasks:

- a. The CSG Team has offered several optional tasks related to the development of the Thoroughfare Plan. Our uncertainty about the availability of volume-to-capacity (v/c) ratios and level of service (LOS) data from the City and County resulted in offering an additional task in examining the status of the existing transportation network, listed as Existing Transportation Network Analysis Option under Data Collection - Existing Conditions Analysis in Tab 9 - Cost Breakdown.
- b. Our base proposal does not include any update of the Treasure Coast Regional Planning Model, Version 5.0's (TCRPM5) coded land uses for consistency with future land use and zoning. Should the data be out of date, the quality of the finished Thoroughfare Plan might require a model update for land uses and network. This optional task is described in Tab 5 - Approach to Project and listed as Travel Demand Model Review Option under Data Collection - Existing Conditions Analysis in Tab 9 - Cost Breakdown.
- c. Our base cost proposal includes a review of the TCRPM5 model. A baseline model run will be completed to forecast buildout traffic volumes on the thoroughfare network. We have included an optional task to run to 3 alternative model scenarios to capture any alternative future land use options that the City may want to test. Future traffic volumes would then be analyzed to identify future v/c ratios and LOS. Baseline future v/c ratios and LOS will be summarized in tables and maps. This is expected to identify the vehicular operating conditions of the established thoroughfare network with the baseline and three alternative land use plans. Should the City only want to test one Future Land Use scenario, then this option would not be necessary. We have included this optional task and listed it as Initial Travel Demand Model Review Analysis Option under Future Annexation Analysis in Tab 9 - Cost Breakdown.
- d. The output of our work will inform the development of the Thoroughfare Plan. Vehicular travel demands and impacts will be quantified and summarized in maps and tables. Roadways with unacceptable v/c ratios or levels of service will be identified for improvement by adding lanes or parallel network.

Vehicular travel demands may have the potential to be offset by incorporating multimodal elements into the Thoroughfare Plan. This strategy may include the improvement of existing roadways (additional general purpose lanes, managed lanes, enhanced transit options, development of new roadways or parallel roadway network, or green multimodal facilities (trails, bike lanes, cycle tracks, sidewalks, etc.). As an optional component to our base proposal, the benefit from each strategy will be quantified and future conditions will be evaluated for the improved thoroughfare network. These mitigation strategies can augment the thoroughfare network in an enhance multi-modal strategy and will be summarized within a mapped final Thoroughfare Plan. We have included this optional task and listed it as Initial Thoroughfare Plan Development Option under Cost-Revenue Analysis in Tab 9 - Cost Breakdown.

Tab 12 Additional Required Proposal Submittal Forms

Tab 12 Additional Required Proposal Submittal Forms



Attachment A - Mandatory Responses				
These questions are Pass/Fail. To be considered responsive, responsible and eligible for award, you must answer all questions in this section.				
DO NOT INCLUDE ANY COST INFORMATION IN YOUR RESPONSE TO THIS WORKSHEET.				
Question #	Questions per Proposal Factors/Categories	Response by Offeror. Only Yes or No Answers	Upload Attachments ?	Attachment Location
Proposal Factors				
1	List any criminal violations and/or convictions of the Proposer and/or any of its principals: (N/A is not an acceptable answer).	No	IF YES	Tab 8
2	Is the firm incorporated? Yes--No If yes, in what state?	Pennsylvania	NO	N/A
3	List any judgements from lawsuits in the last five (5) years: (N/A is not an acceptable answer).	No	IF YES	Tab 8
4	List any lawsuits pending or completed within the past five (5) years involving the corporation, partnership or individuals with more than ten percent (10%) interest: (N/A is not an acceptable answer).	No	IF YES	Tab 8
5	Has the Proposer or any of its principals ever been declared bankrupt or reorganized under Chapter 11 or put into receivership?	No	IF YES	Tab 8
6	Proposers are required to submit all licenses and certifications required to perform this project.	Yes	YES	Tab 3
7	Proposers are required, to submit a copy of their Insurance Certificate for the type and dollar amount of insurance they <u>currently maintain</u> .	Yes	YES	Tab 8
8	Complete and attach Contractor's General Information Work Sheet	Yes		
9	Complete and attach E-Verify Form	Yes	YES	Tab 8
10	Complete and attach Drug Free Workplace Form	Yes	YES	Tab 8
11	Complete and attach Consultant Code of Ethics	Yes	YES	Tab 8
12	Complete and attach Non-Collusion Affidavit	Yes	YES	Tab 8
13	Complete and attach Cone of Silence Form	Yes	YES	Tab 8
14	Complete and attach Vendor Certification Regarding Scrutinized Companies' List	Yes	YES	Tab 8
15	Submit W-9	Yes	YES	Tab 8

State of Florida Department of State

I certify from the records of this office that G-A-I CONSULTANTS, INC. is a Pennsylvania corporation authorized to transact business in the State of Florida, qualified on December 11, 1974.

The document number of this corporation is 833525.

I further certify that said corporation has paid all fees due this office through December 31, 2022, that its most recent annual report/uniform business report was filed on January 21, 2022, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-first day of January,
2022*



Randy Bee
Secretary of State

Tracking Number: 1728390080CC

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

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

CONTRACTOR'S GENERAL INFORMATION WORK SHEET

eRFP #20230007

Boundary and Annexation Study

It is understood and agreed that the following information is to be used by the City to determine the qualifications of prospective Contractor to perform the work required. The Contractor waives any claim against the City that might arise with respect to any decision concerning the qualifications of the Contractor.

The undersigned attests to the truth and accuracy of all statements made on this questionnaire. Also, the undersigned hereby authorizes any public official, Engineer, Surety, bank, material or equipment manufacturer, or distributor, or any person, firm or corporation to furnish the City any pertinent information requested by the City deemed necessary to verify the information on this questionnaire.

Dated at X Orlando, FL _____, this 19th day of December, 2022
(Location)

Name of Organization/Contractor: GAI Consultants, Inc.

By: Peter C. Sechler, Vice President
Name and Title

1. Corporation, Partnership, Joint Venture, Individual or other? Corporation

2. Firm's name and main office address, telephone and fax numbers

Name: GAI Consultants, Inc.

Address: 618 E. South Street, Suite 700, Orlando, FL 32801

Telephone Number: 407.423.8398

Fax Number: 407.843.1070

3. Contact person: Peter C. Sechler Email: P.Sechler@gaiconsultants.com

4. Firm's previous names (if any). _____

5. How many years has your organization been in business? 64 Years

6. Total number of staff at this location: 129 Total number of staff on the Treasure Coast: _____

7. List the license(s) that qualifies your firm to construct this project: _____

Board of Professional Engineers: GAI's Qualifying Professional: Gary Dejidas License Number PE36618
Division of Real Estate: Owen Marl Beitsch License Number: SL595584
American Institute of Certified Planners: AICP – Owen M. Beitsch
American Institute of Certified Planners: AICP – Peter Sechler
Board of Landscape Architecture: Peter Charles Sechler License Number: LA0001465
Certified Trainer, Florida Redevelopment Academy: Peter Sechler, Owen Beitsch, Laura Smith

8. **ADDENDUM ACKNOWLEDGMENT** - Bidder acknowledges that the following addenda have been received and are included in its proposal/bid:

Addendum Number	Date Issued	Addendum Number	Date Issued

9. Has the Contractor or any principals of the applicant organization failed to qualify as a responsible Contractor; refused to enter into a contract after an award has been made; failed to complete a contract during the past five (5) years or been declared to be in default in any contract or been assessed liquidated damages in the last five (5) years? List the name of project, location, client, engineer, date and reason. Use additional pages if needed.

Total Number of Projects where Failure to Complete Work Occurred: 0

Project Number 1

Client Name:

Client Address:

Client Phone Number:

Client Email:

Date:

Reason:

Insert additional projects if needed.

10. Has the Contractor or any of its principals ever been declared bankrupt or reorganized under Chapter 11 or put into receivership?

Yes ()

No (X)

If yes, please explain:

11. List any lawsuits pending or completed within the past five (5) years involving the corporation, partnership or individuals with more than ten percent (10 %) interest:

None

(N/A is not an acceptable answer - insert lines if needed)

12. List any judgments from lawsuits in the last five (5) years:

None

(N/A is not an acceptable answer - insert lines if needed)

13. List any criminal violations and/or convictions of the Proposer and/or any of its principals:

None

(N/A is not an acceptable answer - insert lines if needed)



Signature



Title

NOTICE TO ALL PROPOSERS

To ensure fair consideration is given for all Proposers, it must be clearly understood that upon release of the proposal and during the proposal process, firms and their employees of related companies as well as paid or unpaid personnel acting on their behalf shall not contact or participate in any type of contact with City employees, department heads or elected officials, up to and including the Mayor and City Council. The **“Cone of Silence”** is in effect for this solicitation from the date the solicitation is advertised on DemandStar, until the time an award decision has been approved by City Council and fully executed by all parties. Information about the Cone of Silence can be found under the [City of Port St. Lucie Ordinance 20-15, Section 35.13](#). Contact with anyone other than the Issuing Officer may result in the vendor being disqualified. All contact must be coordinated through Mr. Nate Rubel, Issuing Officer, for the procurement of these services.

All questions regarding this Solicitation are to be submitted in writing to Othniel Beauzyl, Procurement Agent with the Procurement Management Department via e-mail obeauzyl@cityofpsl.com, or by phone 772344-4068. Please reference the Solicitation number on all correspondence to the City.

All questions, comments and requests for clarification must reference the Solicitation number on all correspondence to the City. Any oral communications shall be considered unofficial and non-binding.

Only written responses to written communication shall be considered official and binding upon the City. The City reserves the right, at its sole discretion, to determine appropriate and adequate responses to the written comments, questions, and requests for clarification.

*NOTE: All addenda and/or any other correspondence before bid close date (general information, question and responses) to this solicitation will be made available exclusively through the [DemandStar's Website](#) for retrieval. All notice of intent to award documentation will be published on the [City Clerk's Website](#). Proposers are solely responsible for frequently checking these websites for updates to this solicitation.

I understand and shall fully comply with all requirements of City of Port. St. Lucie Ordinance 20-15, Section 35.13.

Typed Name: Peter C. Sechler

Signed:  _____

Company and Job Title: GAI Consultants, Inc. Vice President _____

Date: 19 DEC 2022 _____



"A City for All Ages"

e-BID #20230007

CONTRACTOR'S CODE OF ETHICS

The City of Port St Lucie ("City), through its Procurement Management Department ("Procurement Management Department") is committed to a procurement process that fosters fair and open competition, is conducted under the highest ethical standards and enjoys the complete confidence of the public. To achieve these purposes, Procurement Management Department requires each vendor who seeks to do business with the City to subscribe to this Contractor's Code of Ethics.

- ◆ A Contractor's bid or proposal will be competitive, consistent and appropriate to the bid documents.
- ◆ A Contractor will not discuss or consult with other Vendors intending to bid on the same contract or similar City contract for the purpose of limiting competition. A Vendor will not make any attempt to induce any individual or entity to submit or not submit a bid or proposal.
- ◆ Contractor will not disclose the terms of its bids or proposal, directly or indirectly, to any other competing Vendor prior to the bid or proposal closing date.
- ◆ Contractor will completely perform any contract awarded to it at the contracted price pursuant to the terms set forth in the contract.
- ◆ Contractor will submit timely, accurate and appropriate invoices for goods and/or services actually performed under the contract.
- ◆ Contractor will not offer or give any gift, item or service of value, directly or indirectly, to a City employee, City official, employee family member or other vendor contracted by the City.
- ◆ Contractor will not cause, influence or attempt to cause or influence, any City employee or City Official, which might tend to impair his/her objectivity or independence of judgment; or to use, or attempt to use, his/her official position to secure any unwarranted privileges or advantages for that Vendor or for any other person.
- ◆ Contractor will disclose to the City any direct or indirect personal interests a City employee or City official holds as it relates to a Vendor contracted by the City.
- ◆ Contractor must comply with all applicable laws, codes or regulations of the countries, states and localities in which they operate. This includes, but is not limited to, laws and regulations relating to environmental, occupational health and safety, and labor practices. In addition, Contractor must require their suppliers

Page 1 of 2

e-BID #20230007

(including temporary labor agencies) to do the same. Contractor must conform their practices to any published standards for their industry. Compliance with laws, regulations and practices include, but are not limited to the following:

- o Obtaining and maintaining all required environmental permits. Further, Contractor will endeavor to minimize natural resource consumption through conservation, recycling and substitution methods.
- o Providing workers with a safe working environment, which includes identifying and evaluating workplace risks and establishing processes for which employee can report health and safety incidents, as well as providing adequate safety training.
- o Providing workers with an environment free of discrimination, harassment and abuse, which includes establishing a written antidiscrimination and anti-bullying/harassment policy, as well as clearly noticed policies pertaining to forced labor, child labor, wage and hours, and freedom of association.

Name of Organization/Proposer GAI Consultants, Inc.

Signature  _____

Printed Name and Title Peter C. Sechler, Vice President

Date Dec 19/2022

DISCLAIMER: This Code of Ethics is intended as a reference and procedural guide to contractors. The information it contains should not be interpreted to supersede any law or regulation, nor does it supersede the applicable contractor contract. In the case of any discrepancies between it and the law, regulation(s) and/or contractor contract, the law, regulatory provision(s) and/or vendor contract shall prevail.

DRUG-FREE WORKPLACE FORM
eRFP # 20230007
Boundary and Annexation Study

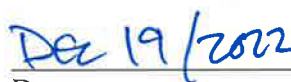
The undersigned Contractor in accordance with Florida Statute 287.087 hereby certifies that
GAI Consultants, Inc. does:
(Name of Business)

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 proposal 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 proposal, 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 Florida Statutes or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

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



Bidder's Signature



Date:



"A City for All Ages"

E-Verify Form

Supplier/Consultant acknowledges and agrees to the following:

1. Shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Supplier/Consultant during the term of the contract; and
2. Shall expressly require any subcontractors performing work or providing services pursuant to the state contract to likewise utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term.
3. The Contractor hereby represents that it is in compliance with the requirements of Sections 448.09 and 448.095, Florida Statutes. The Contractor further represents that it will remain in compliance with the requirements of Sections 448.09 and 448.095 Florida Statutes, during the term of this contract and all attributed renewals.
4. The Contractor hereby warrants that it has not had a contract terminated by a public employer for violating Section 448.095, Florida Statutes, within the year preceding the effective date of this contract. If the Contractor has a contract terminated by a public employer for any such violation during the term of this contract, it must provide immediate notice thereof to the City.

E-Verify Company Identification Number 775821

Date of Authorization 4/23/2014

Name of Contractor GAI Consultants, Inc.

Name of Project Boundary and Annexation Study

Solicitation Number (If Applicable) eRFP (Event) Number: 20230007

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on December, 19, 2022 in Orlando (city), FL (state).



 Signature of Authorized Officer

Peter C. Sechler, Vice President

 Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME

ON THIS THE 19th DAY OF December, 2022.

NOTARY PUBLIC Christina Lorenzo

My Commission Expires: Jan. 28, 2024





"A City for All Ages"

NON-COLLUSION AFFIDAVIT

eRFP #20230007

**Boundary and Annexation
Study**

State of Florida }

County of Orange }

Peter C. Sechler

_____ being first duly sworn, disposes and says that:

(Name/s)

1. They are Vice President of GAI Consultants, Inc. the Proposer that

(Title)

(Name of Company)

has submitted the attached PROPOSAL;

2. He is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such PROPOSAL;

3. Such Proposal is genuine and is not a collusive or sham Proposal;

4. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Proposer, firm or person to submit a collusive or sham Proposal in connection with the contract for which the attached proposal has been submitted or to refrain from proposing in connection with such Contract or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm or person to fix the price or prices in the attached Proposal or of any other Proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of Port St. Lucie or any person interested in the proposed Contract; and

5. The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

(Signed) 

(Title) Vice President



"A City for All Ages"

STATE OF FLORIDA }
COUNTY OF ST. LUCIE } SS:

Orange

The foregoing instrument was acknowledged before me this (Date) December 19, 2022

by: Peter C. Sechler who is personally known to me or who has produced
_____ as identification and who did (did not) take an oath.

Commission No. GG919043

Notary Print: Christina Lorenzo

Notary Signature *Christina Lorenzo*



VENDOR CERTIFICATION REGARDING SCRUTINIZED COMPANIES' LISTS

Vendor Name: GAI Consultants, Inc,
Vendor FEIN: GAI Federal ID No. 25-1260999
Authorized Representative's Name: Peter C. Sechler
Authorized Representative's Title: Vice President
Address: 618 E. South Street, Suite 700
City, State and Zip Code: Orlando, Florida 32801
Phone Number: 407.423.8398 Office | 321.319.3126 Direct
Email Address: P.Sechler@gaiconsultants.com

Sections 287.135 and 215.473, Florida Statutes, prohibit Florida municipalities from contracting with companies, for goods or services over \$1,000,000 that are on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or to engage in any Business operations with Cuba or Syria. Sections 287.135 and 215.4725 also prohibit Florida municipalities from contracting with companies, for goods or services in any amount that are on the list of Scrutinized Companies that Boycott Israel.

The list of "Scrutinized Companies" is created pursuant to Section 215.473, Florida Statutes. A copy of the current list of "Scrutinized Companies" can be found at the following link: <https://www.sbafla.com/fsb/FundsWeManage/FRSPensionPlan/GlobalGovernanceMandates/QuarterlyReports.aspx>

As the person authorized to sign on behalf of the Respondent Vendor, I hereby certify that the company identified above in the section entitled "Respondent Vendor Name" is not listed on either the Scrutinized Companies with Activities in Sudan List; or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; is not participating in a boycott of Israel; and does not have any business operations with Cuba or Syria. I understand that pursuant to Sections 287.135 and 215.473, Florida Statutes, the submission of a false certification may subject the Respondent Vendor to civil penalties, attorney's fees, and/or costs.

I understand and agree that the City may immediately terminate any contract resulting from this solicitation upon written notice if the company referenced above are found to have submitted a false certification or any of the following occur with respect to the company or a related entity: (i) for any contract for goods or services in any amount of monies, it has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or (ii) for any contract for goods or services of one million dollars (\$1,000,000) or more, it has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or it is found to have been engaged in business operations in Cuba or Syria.

Authorized Signature

Peter C. Sechler

Print Name

Signature

Terra Insurance Company
(A Risk Retention Group)
Two Fifer Avenue, Suite 100
Corte Madera, CA 94925



DATE

01/01/22

CERTIFICATE OF INSURANCE

CERTIFICATE HOLDER

This is a specimen certificate of insurance.
If you require a true certificate of insurance,
please contact Terra Insurance Company.

This certifies that the "claims made" insurance policy (described below by policy number) written on forms in use by the Company has been issued. This certificate is not a policy or a binder of insurance and is issued as a matter of information only, and confers no rights upon the certificate holder. This certificate does not alter, amend or extend the coverage afforded by this policy.

The policy of insurance listed below has been issued to the insured named above for the policy period indicated. Notwithstanding any requirement, term or condition of any contract or other document with respect to which this certificate may be issued or may pertain, the insurance afforded by the policy described herein is subject to all the terms, exclusions and conditions of such policy. Aggregate limits shown may have been reduced by paid claims.

TYPE OF INSURANCE Professional Liability

POLICY NUMBER

222018

EFFECTIVE DATE

01/01/22

EXPIRATION DATE

12/31/22

LIMITS OF LIABILITY \$1,000,000 EACH CLAIM
\$1,000,000 ANNUAL AGGREGATE

PROJECT DESCRIPTION

For evidentiary purposes only.

CANCELLATION: If the described policy is cancelled by the Company before its expiration date, the Company will mail written notice to the certificate holder thirty (30) days in advance, or ten (10) days in advance for non-payment of premium. If the described policy is cancelled by the insured before its expiration date, the Company will mail written notice to the certificate holder within thirty (30) days of the notice to the Company from the insured.

NAME AND ADDRESS OF INSURED

GAI Consultants, Inc.
(Pittsburgh)
385 E. Waterfront Drive
Homestead, PA 15120-5005

ISSUING COMPANY:

TERRA INSURANCE COMPANY
(A Risk Retention Group)

A handwritten signature in blue ink, appearing to read 'David Collette', is written over a horizontal line.

President



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 9/30/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 60236
HUB International Three Rivers
210 Sixth Avenue
30th Floor
Pittsburgh, PA 15222
CONTACT NAME: Andrea Buczynski
PHONE (A/C, No, Ext):
FAX (A/C, No):
E-MAIL ADDRESS: andrea.buczynski@hubinternational.com
INSURER(S) AFFORDING COVERAGE
INSURER A : The Continental Insurance Company 35289
INSURER B : Valley Forge Insurance Company 20508
INSURER C : Ironshore Specialty Company 25445
INSURER D :
INSURER E :
INSURER F :

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Table with columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include Commercial General Liability, Umbrella Liab, Workers Compensation and Employers' Liability, and Pollution / Environm.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Umbrella coverage is Excess and follows form on the following policies:
General Liability (incl OH Stop Gap) - Valley Forge - 6050488311; Automobile Liability - Old Republic - L243256-22; Employer's Liability - Valley Forge - 6050442655

CERTIFICATE HOLDER CANCELLATION

Evidence of Coverage
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE
[Signature]



CERTIFICATE OF LIABILITY INSURANCE

Acct#: 2706974

DATE (MM/DD/YYYY)
10/03/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER LOCKTON AFFINITY, LLC P.O. BOX 879610 KANSAS CITY, MO 64187-9610	CONTACT NAME: LOCKTON AFFINITY, LLC	
	PHONE (A/C, No, Ext):	FAX (A/C, No): 913-652-7599
E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A : Old Republic Insurance Company		24147
INSURER B :		
INSURER C :		
INSURER D :		
INSURER E :		
INSURER F :		

INSURED
GAI Consultants, Inc.
385 E Waterfront Drive
Homestead, PA 15120


COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS- <input type="checkbox"/> OCCUR <hr/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-IFCT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$	
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	L243256-22	10/01/2022	10/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
	UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$	
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) GPBR:
 POLICY PROVIDES PROTECTION FOR ANY AND ALL OPERATIONS/JOB PERFORMED BY THE NAMED INSURED WHERE REQUIRED BY WRITTEN CONTRACT. CERTIFICATE HOLDER IS AN ADDITIONAL INSURED WHERE REQUIRED BY WRITTEN CONTRACT. WAIVER OF SUBROGATION INCLUDED BY WRITTEN CONTRACT. INSURANCE IS PRIMARY AND NON-CONTRIBUTORY.

CERTIFICATE HOLDER**CANCELLATION**

Sample	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. G-A-I Consultants, Inc.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 385 E Waterfront Dr	Requester's name and address (optional)
6 City, state, and ZIP code Homestead, PA 15120	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
2	5	-	1	2	6	0	9	9	9

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶		Digitally signed by Alexander S. Macmillan <small>DN: cn=Alexander S. Macmillan, email=a.macmillan@gaiconsultants.com, Date: 2022.06.06 13:27:53 -0400</small>	Alexander S. Macmillan VP/Controller	Date ▶ 6/6/2022
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



GAI Consultants, Inc.

618 E. South Street, Suite 700
Orlando, FL 32801
407.423.8398

gaiconsultants.com