

**COKER CONSULTING, LLC**  
**AND**  
**METZ, HUSBAND AND DAUGHTON**

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# Coker Consulting

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**Christopher Coker**

Governmental Affairs and Business Development Consultant

317 East Park Avenue Tallahassee, Florida 32301

Telephone: (850)-570-5432

Email: Chris@cokerconsultingfl.com

## **Memorandum**

**TO:** Village of Wellington Council

**FROM:** Coker Consulting, LLC

**RE:** Village of Wellington, Request for Letters of Interest

**DATE:** March 5, 2013

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After reviewing your Request for Letters of Interest (RLI), Coker Consulting, LLC (CC) worked with Metz, Husband, and Daughton to develop a strategy to achieve the goals outlined by the Village of Wellington. In conjunction, the two firms will provide effective representation before Florida's legislative, executive, and local branches of government.

If selected, CC will work closely with Metz, Husband, and Daughton to achieve the Village's goals and to create and implement a complete legislative strategy. Working together, it will be our goal to inform and educate legislators about the Village and to present the needs of the Village before the Legislature and local officials.

Though CC is a fairly new firm, it rivals many older firms when it comes to political relationships and access. In conjunction with Metz, Husband, and Daughton, who are consistently among the State's top political fundraisers, we can provide significant relationships throughout the Florida Legislature and various local governments. With great experience between the two firms, we have the required expertise to reinforce the clients' position on issues with the legislature. Though CC does not provide legal services on regulatory inquiries, Metz, Husband, and

Daughton have the legal department to provide legal council and have the ability to testify at public hearings.

Coker Consulting, LLC is a small firm representing companies in multiple policy areas and before the State Legislature, Executive office of the Governor and key agencies. Through a proactive approach, CC maintains relationships with leadership staff and other important personnel, along with top ranking legislators, to gain perspective on issues early to allow for accurate and strategic solutions to dilemmas. Working with Metz, Husband, and Daughton, we have the resources to cover any problems that may arise in a stress free manor.

### **Proposal**

Important to the Village, is the ability of firms to work with other interested parties and stakeholders to get the best results. CC will subcontract with Metz, Husband, and Daughton to best advance the agenda of the Village throughout consistent reporting and monitoring of legislative activity. More importantly, any specific budget related projects can be monitored and advanced through relationships with legislators involved in the House and Senate appropriation committees. Though CC is a smaller shop, every client receives equal attention and is represented completely. Coker Consulting, LLC and Metz, Husband, and Daughton will work with the Village to develop legislative proposals, priorities, and ultimately a final legislative agenda. A strategy session helps because we are able to talk through the political implications associated with policy issues with the client. The most efficient way for CC and Metz, Husband & Daughton to learn the specific needs of the Village is to have a joint strategy session where we can fully talk through policy, regulatory and funding issues of the Village and any pertinent political implications of those needs.

The RFI seeks to also have a firm that can address regulatory concerns. Metz, Husband & Daughton is different than many other lobbying firms in that they are a strong law firm with a history of administrative and regulatory representation. In order to best work with the Village and Coker Consulting, we would collectively advise the Council on potential issues that may occur and the necessary steps to remedy any potential administrative or regulatory issues that could arise. This would include facilitating a comprehensive strategy for the Village, but not include legal representation under the terms of this agreement. CC and Metz, Husband & Daughton would participate in the procurement of preferred representation for regulatory and administrative actions.

The firm of Metz, Husband & Daughton has handled a wide number of clients for many years. The team consists of 9 lobbyists; 6 attorneys and 3 governmental consultants. The entire firm works as a team on all client issue and appropriately distributes workload to ensure nothing is missed, nor that any firm member feel overwhelmed or any client feel disengaged. We will appropriately task members of the lobbying team in order to appropriately handle the Village's needs. Metz,

Husband & Daughton will assign a firm member to be the point with CC and properly update the rest of the team representing the Village.

Together, Coker Consulting and Metz, Husband & Daughton will provide unparalleled representation for the Village of Wellington before Florida's legislative, executive and local branches of Government. Further information pertaining to the lobby team is included within this packet of information, such as biographies and representative clients for Coker Consulting and the entire firm of Metz, Husband & Daughton.

Sincerely,

A handwritten signature in black ink, appearing to read 'Coker', with a stylized, flowing script.

Christopher L. Coker  
Coker Consulting, LLC



Christopher Lee Coker is the owner and operator of Coker Consulting, LLC. Coker Consulting provides services to many clients on political, policy, and business development. Coker Consulting, LLC works primarily in the State of Florida, but representation is not limited solely to Florida.

Chris attended Florida State University and graduated as a third generation alumni with a BS in Political Science. While attending FSU, Chris worked for The Republican Party of Florida and The Florida Chamber of Commerce. In these roles, Chris managed political candidates, their campaigns and multiple issue campaigns. During this time, Chris played a vital role in the passage of a Florida constitutional amendment and a special election for former Florida Senate District 3. Following his time at the RPOF and The Florida Chamber of Commerce, Chris worked as a government consultant for the Fowler White Boggs Law Firm in the Legislative and Political practice group. Working directly under Mac Stipanovich, an undisputed industry leader in both state and federal politics, Chris gained a practical education in client management, the development of political strategy and policy implementation. At Fowler White, Chris gained valuable relationships with Florida's largest businesses and legislators statewide.

After graduating, Chris went on to manage and win two more special elections for the State Senate and both candidates are now likely to be elected as future Senate Presidents. Chris followed those successes with influential roles in Governor Rick Scott's campaign as both a political campaign advisor and an advisor during the transition into his new post. Following the Governor's swearing into office, Chris went to work as the Legislative Director for the Agency for Workforce Innovation, specializing in the issues of unemployment compensation, workforce development, and early learning. Under the direction of Governor Scott, Chris played a lead role in a massive reorganization project combining and restructuring multiple State agencies into the Department of Economic Opportunity to more effectively serve Florida's ever growing and evolving needs.

Following the successful re-org at AWI, Chris then went to the Agency for Persons with Disabilities as their Legislative Affairs Director. While at the APD and under the leadership of Governor Scott, Chris' team passed legislation that improved the lives of the clients the agency served, while promoting conservative spending. This legislation has allowed APD to operate within their state allocation for the first time in many years and fixed a nearly 100 million dollar spending deficit carried forward from past administrations.

Chris currently resides in Tallahassee with his beautiful wife Jennifer and their two dogs, Ahi and Kahala.

# Coker Consulting

**Christopher Coker**

Governmental Affairs and Business Development Consultant

317 East Park Avenue Tallahassee, Florida 32301

Telephone: (850)-570-5432

Email: Chris@cokerconsultingfl.com

## **Memorandum**

**TO:** Village of Wellington Council

**FROM:** Coker Consulting, LLC

**RE:** Supplementary Information

**DATE:** March 5, 2013

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The Village of Wellington Request for Letters of Interest (RLI) asked for supplementary information pertaining to the firm(s) seeking consideration. Some of the information sought by the Village of Wellington included a list of clients during the past five years/list of professional references and a proposed rate structure. The RLI also asks for an indication that the person(s) performing the services are properly registered.

Coker Consulting represents various businesses in front of the Florida Legislature. As Coker Consulting is currently a new business entity, the Florida Lobbyist Registration Office (Office) is delinquent in the official records. Coker Consulting has submitted all forms for approval to register for the 2013 Legislative Session, both with the legislative and executive branches. Metz, Husband & Daughton has provided a print out of Senior Partner Stephen W. Metz's Lobbyist Registration from the Office as a representative official client list. All members of the firm are registered appropriately for every client of the firm. This list will also provide a representative client list for the past 5 years as requested.

The Village asks for a proposed rate structure to be provided. Coker Consulting and Metz, Husband & Daughton would work for the Village of Wellington on an annual basis. Payment should be made monthly with a 30 day option to discountinue any

professional relationship. Annual contracts are important to Coker Consulting and Metz, Husband & Daughton as both companies expend considerable time building relationships and earning the trust of Florida's elected officials. It is because of our valued, long-time clients that we are able to effectively advocate for each client before the Florida Legislature, Executive Branch and local governments. Coker Consulting and Metz, Husband & Daughton would provide these services for a monthly fee of \$5,000 and any additional, reasonable costs associated with providing lobbying services for the Village of Wellington.

The Village's RLI also asks for references from clients. Please find included below client references for both Coker Consulting and Metz, Husband & Daughton.

**Coker Consulting, LLC**

Cameron Cooper  
Director of External Affairs  
Progress Energy  
(850)251-3848  
[Cameron.Cooper@pgnmail.com](mailto:Cameron.Cooper@pgnmail.com)

Leslie Leech, Jr.  
CEO, Sunrise Communities, LLC  
(305)273-3011  
[lleech@sunrisegroup.org](mailto:lleech@sunrisegroup.org)

**Metz, Husband & Daughton, P.A.**

Jeff Rabren  
Senior Vice President, Government Affairs  
Regions Financial Corporation  
(205)910-6218  
[Jeff.Rabren@regions.com](mailto:Jeff.Rabren@regions.com)

Ted Conner  
Senior Vice President, General Counsel  
Attorneys' Title Fund Services, LLC  
(407)855-5852  
[TConner@thefund.com](mailto:TConner@thefund.com)

Tom McLain  
CEO, Claro Scientific, LLC  
Chairman, BioFlorida Government Relations Committee  
(561)789-8064  
[Thomas.McLain@clarosci.com](mailto:Thomas.McLain@clarosci.com)

Select Year: 2013

Select Type: Legislative

Select View: By Name Go

## 2013 Legislative Lobbyist

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The "Industry Code" listed below each principal address states the North American Industry Classification System (NAICS) code that most accurately describes the principal's main business. You may view the full list of codes and titles on the site: <http://www.census.gov/naics/2007/NAICO607.HTM>.

### Stephen W. Metz

**Mailing Address:**

PO Box 10909

Tallahassee, FL 32302

**Phone Number:**

850/205-9000

**Principals:**

ADP Total Source

10200 Sunset Dr Miami, FL 33173

Industry Code: 561330

Effective: 01/14/2013

American Express Company

American Express Tower 200 Vesey St 48th Floor New York, NY 10285

Industry Code: 522210

Effective: 01/14/2013

American Lung Association of Florida, Inc

5526 Arlington Rd Jacksonville, FL 32211

Industry Code: 813212

Effective: 01/14/2013

Amscot Financial, Inc

600 N Westshore Blvd Ste 1200 Tampa, FL 33606

Industry Code: 522390

Effective: 01/14/2013

Attorneys' Title Fund Services, LLC

PO Box 628600 Orlando, FL 32822-8600

Industry Code: 524127

Effective: 01/14/2013

AutoDataDirect, Inc

1379 Cross Creek Cir Tallahassee, FL 32301

Industry Code: 518111

Effective: 01/14/2013

BioFlorida, Inc

The Esperante Bldg 222 Lakeview Ave 4th Floor West Palm Beach, FL 33401

Industry Code: 813910

Effective: 01/14/2013

Bristol-Myers Squibb Company

777 Scudders Mill Rd P 35-23 Plainsboro, NJ 08536

Industry Code: 325412

Effective: 01/14/2013

Buckeye Florida LP

One Buckeye Dr Perry, FL 32348

Industry Code: 322110

Effective: 01/14/2013

CE Broker, Inc

9550 Regency Square Blvd Ste 1000 Jacksonville, FL 32225

Industry Code: 541611

Effective: 01/14/2013

~~Centene dba Sunshine State Health Plan~~

~~1301 International Pky Ste 400 Sunrise, FL 33323~~ (Withdrawal Date: 02/12/2013)

~~Industry Code: 524114~~

~~Effective: 01/14/2013~~

Consumer Data Industry Association

1090 Vermont Ave NW Ste 200 Washington, DC 20005

Industry Code: 813910

Effective: 01/14/2013

eBay, Inc

2145 Hamilton Ave San Jose, CA 95125

Industry Code: 454111

Effective: 01/14/2013

Faneuil, Inc

2 Eaton St Ste 1002 Hampton, VA 23669

Industry Code: 561421

Effective: 01/14/2013

Florida Academy of Family Physicians

6720 Atlantic Blvd Jacksonville, FL 32225

Industry Code: 813920

Effective: 01/14/2013

Florida Associated General Contractors Council

PO Box 10569 Tallahassee, FL 32302

Industry Code: 813920

Effective: 01/14/2013

Florida Bar Business Law Section, The

651 E Jefferson St Tallahassee, FL 32399-2300

Industry Code: 813920

Effective: 01/14/2013

Florida Bar Foundation, The

109 E Church St Ste 405 Orlando, FL 32801

Industry Code: 813211

Effective: 01/14/2013

Florida Bar, The

650 Apalachee Pky Tallahassee, FL 32399-2300

Industry Code: 813920

Effective: 01/14/2013

Florida Creditors Bar Association, Inc

PO Box 47718 Jacksonville, FL 32247

Industry Code: 541110

Effective: 01/14/2013

Florida Onsite Wastewater Association

PO Box 950368 Lake Mary, FL 32746

Industry Code: 813920

Effective: 01/14/2013

Florida Physical Therapy Association

2104 Delta Way Ste 7 Tallahassee, FL 32303

Industry Code: 813920

Effective: 01/14/2013

Florida Psychiatric Society

521 E Park Ave Tallahassee, FL 32301

Industry Code: 813920

Effective: 01/14/2013

Florida Restaurant and Lodging Association

PO Box 1779 Tallahassee, FL 32302

Industry Code: 813920

Effective: 01/14/2013

Genentech Inc., a Member of the Roche Group

980 9th St Ste 2180 Sacramento, CA 95814

Industry Code: 325414

Effective: 01/14/2013

Gilead Sciences, Inc

333 Lakeside Dr Foster City, CA 94494

Industry Code: 325414

Effective: 01/14/2013

Harbor Branch Oceanographic Institute Foundation, Inc

5600 US #1 N Ft Pierce, FL 34946

Industry Code: 813211

Effective: 01/14/2013

Health Management Associates, Inc

5811 Pelican Bay Blvd Ste 500 Naples, FL 33963-2710

Industry Code: 622110

Effective: 01/14/2013

Information Systems of Florida

9550 Regency Sq Blvd Jacksonville, FL 32225

Industry Code: 541511

Effective: 01/14/2013

Microsoft Corporation

One Microsoft Way Bldg 8 Redmond, WA 98052

Industry Code: 511210

Effective: 01/14/2013

Regions Financial Corporation

1900 5th Ave N 10th Floor Birmingham, AL 35203

Industry Code: 522110

Effective: 01/14/2013

RTI Biologics, Inc

11621 Research Cir Alachua, FL 32615

Industry Code: 325414

Effective: 01/14/2013

Securities Industry & Financial Markets Association

120 Broadway 35th Floor New York, NY 10271-0080

Industry Code: 523120

Effective: 01/14/2013

Siemens Corporation

601 Pennsylvania Ave NW 11th Floor Washington, DC 20004

Industry Code: 541330

Effective: 01/14/2013

Siemens Enterprise Communications, Inc

A/PPO Box 30125 College Station, TX 77842

Industry Code: 517110

Effective: 01/14/2013

Teachers Insurance & Annuity Association

730 Third Ave 14th Floor New York, NY 10017

Industry Code: 524113

Effective: 01/14/2013

United States Sugar Corporation

111 Ponce de Leon Ave Clewiston, FL 33440

Industry Code: 111930

Effective: 01/14/2013

Walt Disney World Company

PO Box 10000 Lake Buena Vista, FL 32830

Industry Code: 512100

Effective: 01/14/2013

Watershed Treatment Programs, The

200 Congress Dr #100 Delray Beach, FL 33445

Industry Code: 623220

Effective: 01/14/2013

Youth Services International

1819 Main St Ste 1000 Sarasota, FL 34236

Industry Code: 623990

Effective: 01/14/2013





## **Stephen W. Metz**

### **Legislative & Governmental Affairs | Administrative Law**

Steve is a shareholder and is extensively involved in the legislative section of the firm. He has over 35 years of experience in the legislative process. Steve received his Bachelor's Degree in Journalism with honors from the University of Florida and earned his Juris Doctor at the Florida State University College of Law.

Steve practices in the areas of legislative, governmental, and administrative. Steve is a former legislative staff member and a former Assistant Attorney General. He was the General Counsel of the Florida Home Builders Association from 1976 to 1981 and the General Counsel of the Florida Chamber of Commerce from 1981 to 1985.

He is a member of the Florida Bar and has been a lecturer on legislative practice and dealing with state agencies. During his career, he has played a major role in a wide range of legislative initiatives including tax issues, health regulations, workers compensation, judicial, environmental, construction and growth management issues.

In 1998 and 1999, Steve was chosen by the leading business associations in Florida to serve as Executive Director of Tort Reform United Effort (TRUE), the lobbying group formed to successfully advocate tort reform in Florida. Steve has served as the Vice President of Governmental Affairs for the Tallahassee Chamber of Commerce and is a member of the Natural Resource Committee of the Florida Chamber of Commerce.

Steve was appointed by Governor Bush to serve on the Florida Sports Foundation and served eight years. Steve was elected vice chair of the Florida Sports Foundation. He also served as the Chairman of the Task Force on Crime for the Florida Chamber of Commerce. Steve currently serves on the Board of the FSU Foundation. Steve was awarded the Distinguished Service Award from the FSU College of Law.

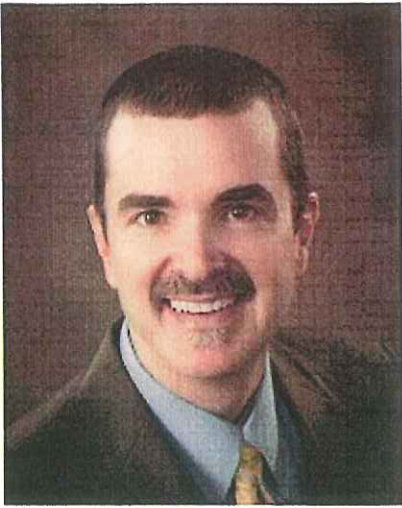
Steve has received the highest "AV" rating from Martindale-Hubbell.

#### CURRENT EMPLOYMENT POSITION(S)

Shareholder Areas Of Practice: Legislative & Governmental Affairs Administrative Law  
Environmental Law Bar Admissions: Florida, 1976 Education: Florida State University College of Law, Tallahassee, Florida, 1975 University of Florida, Gainesville, FL, 1971 B.A. Honors: With Honors Major: Journalism Classes/Seminars Taught: Lecturer, Legislative Practice and Growth Management Topics Honors and Awards: AV Rating, Martindale-Hubbell Professional Associations and Memberships: The Florida Bar Member American Bar Association Member Tort Reform United Effort (TRUE), 1998 – 1999 Executive Director Tallahassee Chamber of Commerce Vice President, Government Affairs Florida Chamber of Commerce Member, Natural Resources Committee Florida Chamber of Commerce Former Chairman, Task Force on Crime Florida Chamber of Commerce Board of Governors Chairman, Legislative Policy Council Past, Vice Chairman, Florida Sports Foundation, Board of Directors of FSU Foundation

#### EMPLOYMENT POSITIONS

Florida House of Representatives, State of Florida, Attorney General's Office; Assistant Attorney General; Florida Home Builders Association, General Counsel, 1976 – 1981; Florida Chamber of Commerce, General Counsel, 1981 – 1986.



## Warren H. Husband

### Legislative & Governmental Affairs | Administrative Law

Civil & Appellate Litigation Warren is a shareholder and member of the administrative law, legislative & governmental affairs, and civil litigation sections of the firm. He regularly represents clients before a broad spectrum of state agencies, and has extensive trial experience before the Division of Administrative Hearings.

Warren provides legal expertise in a wide variety of regulatory areas, including state contracting and procurement, affordable housing development, election law and ethics matters, insurance regulation, pari-mutuel gaming, and alcoholic beverage regulation.

Warren presently serves as the general counsel to the Florida Restaurant & Lodging Association. Reported appellate cases in which Warren was a principal attorney include: Advisory Opinion to the Attorney General Re: Tax Limitation , 644 So. 2d 486 (Fla. 1994)(challenge to several state constitutional amendment initiative petitions); State ex rel. Bruce v. Kiesling , 632 So. 2d 601 (Fla. 1994); Gulfstream Park Racing Ass'n. Inc. v. Dep't of Business & Professional Regulation , 661 So.2d 955 (Fla. 4th DCA 1995); Denmark v. State , 646 So.2d 754 (Fla. 2d DCA 1994); and Goldfarb v. Insurance Co. of North America , 642 So.2d 586 (Fla. 3d DCA 1994).

Warren received his Bachelor's degree, cum laude , in Psychology from the University of South Florida in 1986. After serving four years as an officer in the United States Air Force, he entered law school and received his Juris Doctor with highest honors from Florida State University in 1994, graduating second in his class.

Warren is a member of the Order of the Coif. While in law school, he served both as Notes and Comments Editor and as Piece Selection Committee Chairman for the Florida State University Law Review. Warren has published law review articles on topics ranging from environmental law to intellectual property law.

#### CURRENT EMPLOYMENT POSITION(S)

Shareholder Areas Of Practice: Administrative Law Legislative & Governmental Affairs Civil & Appellate Litigation Construction & Affordable Housing Development Insurance Regulation Gaming Regulation Bar Admissions: Florida, 1993 U.S. District Court Northern District of Florida U.S. District Court Middle District of Florida U.S. Court of Appeals 11th Circuit

#### EDUCATION

Florida State University College of Law, Tallahassee, Florida, 1993 Doctor of Jurisprudence Honors: With Highest Honors Honors: Order of the Coif Law Review: Notes and Comments Editor, Florida State University Law Review Law Review: Piece Selection Committee Chairman, Florida State University Law Review University of South Florida, Tampa, FL, 1986 B.A. Honors: Cum Laude Major: Psychology Published Works: New Approaches and New Polluters: The Practical Impact of the Clean Air Act Amendments of 1990, Florida State University Law Review 19:3, Winter, 1992 Representative Cases: Advisory Opinion to the Attorney General Re: Tax Limitation, 644 So. 2d 486 (Fla. 1994) State ex rel. Bruce v. Kiesling, 632 So. 2d 601 (Fla. 1994) Gulfstream Park Racing Ass'n, Inc. v. Dep't of Business & Professional Regulation, 661 So. 2d 955 (Fla. 4th DCA 1995) Denmark v. State, 646 So. 2d 754 (Fla. 2nd DCA 1994) Goldfarb v. Insurance Co. of North America, 642 So. 2d 586 (Fla. 3d DCA 1994) Professional Associations and Memberships: The Florida Bar, Administrative Law Section Member American Bar Association, Administrative Law and Regulatory Practice Section Member American Bar Association, Affordable Housing and Community Development Law Forum Member Past Employment Positions: United States Air Force, Officer Fraternities/Sororities: Alpha Tau Omega Birth Information: December 19, 1964, Tampa, Florida, United States of America



## **James R. “Jim” Daughton, Jr.**

**Legislative & Governmental Affairs | Administrative Law**

Jim Daughton practices in the legislative affairs and administrative rulemaking areas of the firm with an emphasis on financial services, technology and healthcare. Throughout the course of his professional career Jim has represented Fortune 500 companies, Florida-based businesses and professional associations.

Jim serves on the Advisory Board of the Florida Chamber of Commerce Political Institute and chairs the Florida Chamber's Free Enterprise PAC. Jim speaks regularly to audiences about Florida's governmental and political environment, and recently authored an article for the American Bar Association's Business Law Journal entitled "You Must Be Present to Win, What Business Lawyers Need to Know About Legislative Advocacy."

Jim graduated, with high honors, from the Florida State University College of Law. He earned his B.A. in political science from Stetson University. Jim was the recipient of the William Amory Underhill Award given to the student most likely to have a positive impact on government.

Jim is married to Maureen McCarthy Daughton and has two sons, Connor and Will.

## CURRENT EMPLOYMENT POSITION(S)

Shareholder Areas Of Practice: Legislative & Governmental Affairs Administrative Law Bar

Admissions: Florida, 1998 Professional Associations and Memberships: The Florida Bar, The

American Bar Association Member Florida Chamber of Commerce Past Employment Positions:

Holland & Knight LLP, associate and partner Herndon Daughton and Associates, partner Executive Office of the Governor, Executive Assistant, Deputy Chief of Staff.





## **Monesia T. Brown**

**Legislative & Governmental Affairs | Administrative Law**

Monesia Brown is an attorney who works in a wide range of policy areas, including state procurement, workforce development and education. Monesia has extensive experience advising clients on state and local economic development issues and workforce trends.

Prior to joining private practice Monesia served, at the pleasure of Governor Charlie Crist, as the Director of the Florida Agency for Workforce Innovation, worked for the Florida Department of Legal Affairs as Director of Legislative Affairs, Special Counsel and Chief Cabinet Aide. Under the leadership of Governor Jeb Bush she served as General Counsel to the Department of Management Services and Assistant General Counsel at the Department of Business & Professional Regulation.

Among her other responsibilities Monesia stays very involved within her state and community where she serves on The Early Learning Coalition of the Big Bend, the United Way of the Big Bend, and Friends of the Museum of Florida History. She is also a member of Leadership Florida Class 28.

Monesia attended the University of Wisconsin-Madison, where she earned her J.D. and was editor of the International Law Journal. She attended Illinois State University where she majored in English and Minored in Philosophy.

Monesia is married to Junious Brown, and they are the proud parents of two boys, Jay and Evan.



## **Aimee Diaz Lyon**

### **Legislative & Governmental Affairs | Administrative Law**

Aimee Diaz Lyon is an attorney with over 12 years of experience in legislative and governmental affairs. She represents clients before the legislative and executive branches of Florida government, including regulatory boards and commissions, with an emphasis on health care and judiciary issues. Prior to joining Metz, Husband and Daughton, Aimee served for seven years as legislative counsel for a large statewide legal association.

In her capacity, she provided legislative opinions, drafted legislation and administrative rules and conducted extensive legal research for the association's members. Aimee also has held the position of director of governmental affairs for the Florida Osteopathic Medical Association.

She coordinated the association's efforts to promote legislation and executive rulemaking that protected professional medicine and provided counsel to members and related organizations on the legislative process. Before working for the associations, Aimee served in a variety of legislative staff positions in the Florida House of Representatives including work in a leadership office.

Aimee earned her Juris Doctorate from the Florida State University College of Law and earned a dual Bachelor of Arts degree in Government and Spanish from Dartmouth College. Aimee is fluent in oral and written Spanish. Bar Admissions: Florida, 1999 Professional, Civic and Community Involvement: The Florida Bar Florida Association for Women Lawyers Tallahassee Women Lawyers Young Actors Theatre, Board Member.





## **Greg Black**

**Legislative & Governmental Affairs | Administrative Law**

Greg Black is an attorney who works in the legislative affairs, administrative rulemaking, and state procurement areas of the firm. Greg previously represented the Florida Bankers Association and advocated on behalf of financial institutions of all sizes. In his role with the FBA, Greg focused primarily on issues concerning financial services, insurance and business entities.

Greg Serves on the Florida State University College of Law Alumni Board and also participates in numerous civic and community activities. Greg is a member of the Seminole Torchbearer's and an avid Seminole fan.

Greg graduated from the Florida State University College of Law. While in law school, Greg co-founded the Volunteer Student Law Project which provides pro bono legal services through a partnership with the Legal Aid Foundation of the Tallahassee Bar Association. He earned his B.S. in Criminology with a minor in Business from the Florida State University.

Greg was admitted as a member of the Florida Bar in 2010.

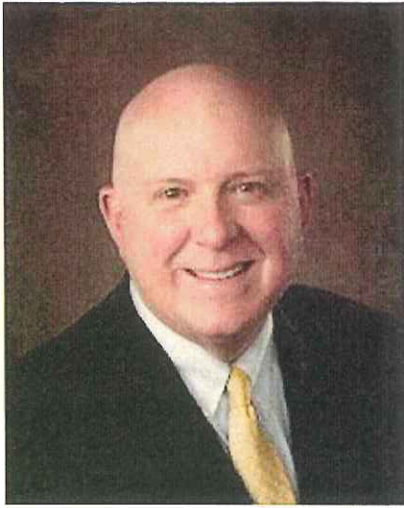


## **Andy T. Palmer**

### **Legislative & Governmental Affairs**

Andy Palmer has more than a decade of experience in Florida politics and government. During the early part of his career, Andy served as the Chief Policy Analyst for Health and Human Services in the Office of Policy and Budget under Governor Jeb Bush. He also held a variety of positions in the Florida House including Legislative Analyst in the House Majority Office and Staff Director of the House Health Care Regulation Committee.

From 2005 – 2006, Andy served as the Republican Party of Florida's (RPOF's) Executive Director for Political Affairs. During what proved to be a poor climate for Republicans nationally, Andy helped secure the election of a Republican Governor, Attorney General and Secretary of Agriculture. During the 2010 election cycle, Andy served as Director of House Campaigns for House Speaker Dean Cannon. Most recently, Andy served as Executive Director of the RPOF for the late Chairman Dave Bitner and Governor Rick Scott.



## **G. Herb Sheheane**

### **Legislative & Governmental Affairs**

Herb is a consultant and has been associated with the firm since January of 2001. He retired from AT&T after 32 years of service, which included many different assignments and responsibilities over the years. At retirement, Herb was Vice President of Governmental Affairs for AT&T in Florida.

His responsibilities included all phases of government relations' representation for Florida. Herb offers knowledge and expertise in issue management at the local, state, and federal levels. Prior to relocating to Florida in 1988, Herb served as the Assistant Vice President-Governmental Affairs for AT&T in Atlanta, Georgia.

While in Georgia, he served on the Business Council of Georgia and Chairman of the Georgia Council of Vocational Education. He also served as Chairman of the Kidney Foundation of Georgia. Over the past 18 years in Florida, Herb has worked to represent business interest in the legislature and community organizations in Florida.

Herb is well respected by the legislative leadership and business leaders in Florida. While in Florida, Herb has served on the Board of Directors of the Florida Chamber of Commerce, Florida Tax Watch and is a past Chairman of the Community in Schools (CIS) organization.

He has also served as the President of the Florida Telecommunications Industry Association. Herb is a graduate of the leadership Florida Program (Class X) and also served on the Board of Directors for many years.



## **Patricia B. Greene**

**Legislative & Governmental Affairs | Administrative Law**

Patricia Greene serves as a Senior Policy Advisor who practices in the legislative affairs and administrative rulemaking areas of the firm. She represents clients before the legislative and executive branches of government, in addition to coordinating a multitude of legislative, political and fundraising activities. Patricia has been active in the legislative process since 1981.

Throughout the course of her professional career Patricia has represented Fortune 500 companies, Florida-based businesses, professional associations and not-for-profit organizations.

Patricia serves on the Advisory Board of the Florida Chamber of Commerce Political Institute.

A native of Fort Walton Beach, Florida, Patricia received her Bachelor's degree, cum laude, in Audiology and Speech Pathology and her Master's degree in Speech Pathology from Florida State University.

Among her other responsibilities Patricia stays very involved within her state and community where she serves on the Steering Committee of the United Way of the Big Bend and is also a Designated Professional Lobbyist for the Florida Association of Professional Lobbyists.





## *Firm Overview*

Metz Husband & Daughton, P.A. is a law firm uniquely positioned to solve our clients' legislative, legal, and regulatory goals. Since the legislative and legal arenas often overlap, our team of lawyers and government consultants have the experience, relationships, credibility, and legal expertise required to successfully represent our clients before all three branches of government: the Legislature, the Cabinet and executive agencies, and every level of state and federal court. From identifying, passing, amending and/or defeating legislative and regulatory proposals affecting our clients' business, to keeping them informed of political and substantive issues and helping to implement our clients' business strategies, we take the time to work with each client individually in order to develop a unique strategy that best suits their specific needs.

As state legislative counsel to numerous Fortune 500 businesses and statewide trade and professional associations, we provide a variety of services necessary to engage in legislative problem-solving on behalf of our clients.

Our team members have been involved in legal and legislative problem-solving for over 35 years, and have developed the substantive knowledge required to effectively represent clients before the legislative, executive and judicial branches. Our team members include a former General Counsel

to various statewide associations, a former Deputy Chief of Staff to a Florida Governor, a former state party Executive Director, and former legislative staff members.

Over the years, some of the legislative and legal problems we have helped our clients solve include:

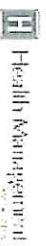
- successful defense of the largest state contract ever awarded to a private company
- successful passage of legislation to appropriate over 50 million dollars to settle a contract dispute with the State
- successful passage of legislation that reduced costs to the restaurant industry by nearly 100 million dollars over ten years
- negotiated legislation pertaining to breach of a company's internal security systems that allowed for common-sense disclosure language without onerous penalty provisions
- work on legislation to provide a comprehensive regulatory scheme for licensed money transmitters engaging in deferred presentment transactions
- successful development and implementation of a comprehensive grassroots and advocacy strategy for a voluntary medical society to protect scope of practice infringement

Whether solving our clients' legislative or legal problems, our firm has a demonstrated record of success, evident by the fact that our client relationships are long-lasting, with some extending for over 30 years. We are proud of this heritage and, with our experience and substantive knowledge, we are committed to carrying on this tradition of government problem-solving.

## Clients

Our firm regularly represents Fortune 500 companies, major Florida corporations, and statewide trade and professional associations. Whether solving our clients' legislative, legal, or regulatory problems, our firm has a demonstrated record of success, evidenced by the fact that our client relationships are long-lasting, with some extending for over 30 years.







## *Legislative & Governmental Affairs*

Members of Metz, Husband and Daughton have successfully represented clients before the Legislature and the Executive Branch for over 35 years. Our Firm includes attorneys and lobbyists who understand the complexities and nuances of the legislative and regulatory process and have the substantive knowledge required to effectively advocate on behalf of clients. This experience enables us to guide our clients through the maze of legislation, regulation, and appropriations that govern their respective businesses and industries, and to ultimately assist our clients in achieving their desired results. Our legislative and governmental affairs services include:

- advising and consulting clients on legislative strategies and developing issues
- identifying strategic interest alliances and coordinating interest groups
- drafting legislation and amendments to filed bills
- building and maintaining close relationships and alliances with legislative delegations
- advising on public affairs, consensus building and grassroots advocacy
- advising on the impacts of change in relevant laws
- assisting in all aspects of developing and executing government business
- engaging in other traditional lobbying activities

The Firm represents a broad range of legislative clients, from statewide trade associations to governmental entities to Fortune 500 companies. We stay well versed in our clients legislative and regulatory issues by constantly researching current developments in all areas of public policy including: health care, telecommunications, economic development, tort reform, construction, pari-mutuel wagering, insurance, tax and local government law

We are committed to providing our clients with the best representation possible by using our experience, knowledge, and reputation to achieve the clients' desired legal, legislative and regulatory goals.

## ***Administrative Law***

The Metz, Husband and Daughton team has over 56 years of combined experience in advising clients on state and local regulatory issues and in actively representing clients before a broad spectrum of state and local government agencies. The Firm has been extensively involved in a wide variety of regulatory arenas, including insurance regulation, election law and ethics complaints, state and local taxes, affordable housing development, pari-mutuel wagering, regulation of professions, and alcoholic beverage law.

Our Firm's representation has covered the full range of regulatory matters, from assisting our clients in shaping new rules and regulations or changing old ones, to challenging proposed or existing rules, to counseling our clients on compliance matters. The Firm has represented clients in virtually every conceivable administrative context, including license/permit suspension or revocation proceedings, tax disputes, challenges to state or local contract awards, and constitutional challenges to rules or statutes.

If a government entity is taking action that will adversely impact your affairs, the Firm and the members of its administrative law practice section stand ready with the experience and skills necessary to help achieve a successful outcome, whether by negotiation or by litigation in appropriate administrative forum or court of law.

## *Public Contracting and Competitive Bidding Law*

Metz, Husband and Daughton routinely represents and consults with clients on public contracting or public bidding matters. Our scope of representation is broad and varied, including: reviewing a Request For Proposal (RFP), attending vendor workshops, proposing changes to a RFP, assist with or providing counsel to the drafting of responsive proposals, counsel as to whether to file a bid protest, and handling the litigation of a bid protest. Also, members of the Firm have been closely involved in state contracting issues after bid awards, including the negotiation and drafting of lease and contracts.

The Firm has extensive experience in RFP processes involving a broad spectrum of public contracts, including: auto emissions testing, student financial aid servicing, investment management services, the state's prepaid college program, juvenile justice office leases, and genetic testing services.

Recently, the Firm has successfully represented two clients in administrative bid protests wherein the issuing agency's decision had been initially adverse to the Firm's client. Although bid protests are typically decided adversely to the challengers, the first of these two cases proceeded to a formal administrative hearing and resulted in a recommended and final order favorable to our client, who ultimately received the disputed state contract. The second case was successfully settled prior to hearing, with the Firm's client receiving a substantial state contract for genetic testing services.

## ***Federal and State Trial and Appellate Litigation***

The litigation section of our firm has varied experience in both criminal and civil trial practice in both state and federal courts. The litigation team includes members of all federal district courts in Florida, as well as the federal appellate bars including the United States Supreme Court. Each is qualified to practice before all Florida state courts, as well. Our members are fully qualified to handle litigation vertically from trial through appeal and discretionary proceedings.

The Firm has developed extensive experience defending law enforcement and correctional agencies concerning allegations of false arrest, malicious prosecution, police brutality, civil rights violations, and liability arising from high-speed pursuits. We have also represented members of the State University System on all manners of civil liability and, in recent years, have expanded our scope to include professional liability claims against attorneys and realtors. The Firm also represents insurance companies and self-insured businesses in defense of civil claims.

The Litigation section of the Firm has devoted a substantial portion of its practice to the area of personal injury, wrongful death, medical negligence, and white-collar criminal defense. We have experience in cases involving automobile accidents, insurance coverage disputes, nursing home negligence, products liability, slip and falls, and drug and alcohol offense.

The Appellate section of the Firm also has varied experience in the District Court of Appeal in Florida and before the Florida Supreme Court. Recently, the Firm represented clients before the Florida Supreme Court on a contentious constitutional amendment that would prohibit smoking in virtually every indoor workplace, including most bars and restaurants.

**DUTKO, POOLE, MCKINNEY, LLC**



Wednesday, March 6, 2013

Mr. Ed De La Vega  
Purchasing Department  
Village of Wellington  
12300 Forest Hill Blvd.  
Wellington, Florida 33414

RE: Lobbying Services for the Village of Wellington

Dear Mr. De La Vega:

Dutko Poole McKinley is interested in continuing our association with the Village of Wellington. Over the past three years, we have worked tirelessly to ensure the passage of legislation helpful to Wellington and to defeat those bills which would harm the Village, and we hope to continue this successful relationship. For example, among many other matters, during the 2012 Session, we worked diligently and successfully to defeat a bill that would have exempted certified lawn care workers from local regulations. The result allowed the Village to continue to regulate itself based on its own needs, rather than subject it to a state-wide regulation. Please accept this as our formal letter of interest to continue providing our services to the Village. Below, you will find an outline of our services, qualifications, experience, case studies, professional references, and client list, as requested.

#### **OUR SERVICES & QUALIFICATIONS**

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Dutko Poole McKinley, LLC is a full-service government consulting firm. We provide our clients with an immediate presence in Tallahassee before the executive and legislative branches. We offer our clients introduction to the Cabinet and executive branch agency officials as well as the House and Senate members and their staff to further our clients' mission. Our team at Dutko Poole McKinley has the expertise needed to navigate Florida's political and administrative waters, which has resulted in long-term successes for our clients.

Furthermore, as a member of the Dutko Grayling family, headquartered in Washington, D.C. with eleven offices nationwide, we are prepared to offer services at the federal level. This would give the Village a direct connection to the nation's capitol.

With regard to local issues, Dutko Poole McKinley has the expertise to handle certain requests by the Village, but we will partner with local firms as necessary to accomplish your goals.

## **OUR TEAM**

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Dutko Poole McKinley prides itself on working as a team. Each client has a lead lobbyist, and for the Village of Wellington, that will be Fred Dickinson. Other members of the team will be registered and briefed on all matters pertaining to the Village. Currently, Van Poole and Fred Dickinson are registered lobbyists for both the executive and legislative branches. Any team member who would perform any service on behalf of the Village would be registered before beginning any work. Both Dutko Poole McKinley and Dutko Grayling are registered with the Florida Department of State. See **Appendix A** for registration information.

### **Will McKinley – Principal**

Will, based in Tallahassee, is a Managing principal at Dutko Poole McKinley. He brings to Dutko extensive leadership experience in the Republican Party, Florida state government, and the field of marketing. Will has built close relationships with state leaders and key policy makers at the Executive and Legislative levels of government while in the Martinez Administration. As Chief of Staff and during his tenure as Executive Director of the Republican Party of Florida, Will contributed to significant Republican gains in United States Congressional, Florida Senate and Florida House seats. Will was a consultant to both the Republican Party of Florida and the National Republican Congressional Committee. During the Reagan-Bush re-election campaign, he was appointed the Southeastern Florida Regional Director.

### **Van Poole – Principal**

A Managing Principal at Dutko Poole McKinley, Van Poole draws on his success in business and politics to successfully serve our clients. A former Florida House Member, State Senator and House Minority Whip, Van has the expertise and knowledge to communicate effectively with legislators. Van also served as Chairman of the Republican Party of Florida, where he saw registrations soar and record numbers of Republicans elected. Van was appointed by President Reagan to the National Advisory Council on Educational Research. Van was also a nominee for the United States Senate in 1982 and served in former Governor Martinez's Cabinet. In addition to his political career, Van worked for ten years with Exxon (Humble Oil) and served as a partner in the firm of Krieg, Kostas, and Poole. Van and his family reside in Florida.

### **Fred Dickinson – Vice President**

Fred Dickinson joined Dutko as a Vice President in the Tallahassee office. He brings with him 20-plus years of experience in the Florida Department of Highway Safety and Motor Vehicles – where he served as Executive Director. As a result of his time working for the State, Fred has a vast understanding of statewide agencies in Florida and has built relationships at all levels of government. In addition to his work with the Department of Highway Safety and Motor Vehicles, Fred has practiced law in the private sector, worked on staff in the legislature, and was

Assistant to the President of Associated Industries of Florida. Fred holds a BA in Government from Wofford College in Spartanburg, South Carolina and a JD from the Florida State University College of Law.

#### **Angela Dempsey – Vice President**

Angela Dempsey, a veteran Florida public policy strategist who managed Florida Governor Rick Scott's legislative activities for the past two years, recently joined the Dutko team in January 2013 as a Vice President in the Tallahassee office. Prior to running Governor Scott's legislative office, Angela served in senior capacities in the Florida Division of Emergency Management, managing emergency management policy, legislative and budget issues; the Florida Public Service Commission; the Florida House of Representatives; and the Executive Office of Governor Jeb Bush, where she provided policy and budget analysis for the Office of Policy and Budget. Her relationships across state government and her experience with both policy and budget matters in the legislative and executive branches of Florida government are exceptionally beneficial in helping companies and organizations achieve their business and policy goals. Angela holds a Bachelor of Science in Public Relations and a Master of Science in Corporate Communication and Marketing from the Florida State University.

#### **Sophie Smith – Legislative Director**

Sophie Smith joined Dutko Poole McKinley in 2007 as the firm's legislative director. Sophie has an extensive knowledge of the legislative process, as well as Florida policy issues. Sophie keeps clients informed on their respective issues, conducts policy research, and compiles campaign finance information during election years. Throughout the legislative session, Sophie attends committee meetings, meets with members and staff on client issues, reads all filed legislation, monitors amendments that may impact our clients, and maintains the office's legislative calendar. At the conclusion of the legislative session, Sophie prepares in-depth analyses for each client, detailing their respective issues. Sophie has also worked on various political campaigns, and continues to volunteer through grassroots efforts. Sophie holds a dual B.A. from the University of Miami in Economics and International Relations, as well as a minor in Spanish.

### **CLIENT CASE STUDIES**

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#### **Seminole Tribe of Florida: Seminole Indian Compact**

Dutko has represented the Seminole Tribe of Florida for ten years, in front of both Florida's legislative and executive branches. In 2010, Dutko was successful in helping to negotiate the Seminole Indian Compact, executed by Governor Charlie Crist and the Seminole Tribe of Florida (Tribe), and later ratified by the Legislature.

The compact authorizes the Tribe to conduct Class III gaming at seven tribal facilities throughout the state. The compact also has a 20-year term and permits the Tribe to offer slot machines, raffles and drawings, and any other new game authorized for any person for any purpose, at all seven of its tribal casinos. Advantageous to both the Tribe and the state, in exchange for the



Tribe's exclusive right to conduct slot machine gaming outside of Miami-Dade and Broward counties and the exclusive right to offer banked card games at the specified facilities, the compact provides for generous revenue sharing payments by the Tribe to the State of Florida. The compact is currently in the second year of the initial period and to date the Tribe has sent over \$1 billion to the state.

#### **Motion Picture Association of America: Entertainment Industry Tax Credits**

Dutko has represented the Motion Picture Association of America for twelve years. Our team helped to create the Entertainment Industry Financial Incentive, which benefits the Motion Picture Association of America, as well as other clients, such as Universal Studios Orlando and the Entertainment Software Association. Dutko worked with our clients, legislative leaders, the Governor's office, the Office of Film and Entertainment and other industry leaders to craft this incentive, which awards transferable tax credits for certain expenditures associated with film, television and digital media productions. The credits not only help to attract production in Florida, but they greatly benefit the State of Florida with the large return on investment. Prior to the passage of this legislation, many film makers had left Florida for other states whose incentives were more attractive. For this particular incentive, the economic investment must happen before the film, television and digital media credits can be received. Most recently in the 2012 Session, Dutko helped to pass legislation which awarded an additional \$42 million in tax credits for the years 2015-2016.

#### **United Technologies Corporation: Fire & Security Incentive Package**

Dutko Poole McKinley assisted United Technologies Corporation (UTC) Fire & Security in securing a \$1.3 million incentive package in Florida. The company acquired GE Security in early 2010, at which time they also took ownership of two facilities in Palm Beach and Manatee counties. Dutko worked with UTC in negotiations with the Governor's office and relevant agencies to facilitate the consolidation of these businesses, maximize their state-of-the-art facilities and help UTC Fire & Security to grow its global customer base. In the agreement, UTC Fire & Security committed to retaining approximately 338 jobs in Florida, creating 45 new positions, and developing a multi-million dollar Fire Innovation and Test Center.

#### **PROFESSIONAL REFERENCES**

---

##### **City of Sanibel**

Judie Zimomra, City of Sanibel, City Manager  
800 Dunlop Road  
Sanibel, Florida 33957  
office: 239-472-3700  
cell: 239-770-0013  
j.zimomra@mysanibel.com

**Miami-Dade County:**

Jess McCarty, Assistant County Attorney  
Miami-Dade County Attorney's Office  
Suite 2810 Stephen P. Clark Center  
111 N.W. 1st Street  
Miami, Florida 33128  
direct: 305-375-1634  
fax: 305-375-5634  
cell: 305-979-7110  
jmm2@miamidade.gov

**Universal Orlando:**

John McReynolds, Senior Vice President, External Affairs  
Universal Parks and Resorts  
1000 Universal Studios Plaza  
Executive Offices B-5  
Orlando, Florida 32819  
direct: 407-363-8774  
cell: 321-299-4871  
John.McReynolds@universalorlando.com

**General Motors:**

Eric Henning, Regional Director, State Government Relations – SE and Central Regions  
General Motors Company  
124 W. Allegan, Suite 1420  
Lansing, Michigan 48933  
direct: 517-377-6906  
fax: 517-377-5369  
cell: 313-588-0152  
eric.henning@gm.com

**PROPOSED RATE STRUCTURE**

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The proposed rate for the state-level effort will be based on meetings with clients, strategic development, and other variables, but is anticipated to be between \$4,000 and \$6,000.

The proposed rate for the federal and local efforts will be based on the task required to accomplish the goals set out by the Village.

**CLIENT LIST**

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Please refer to **Appendix B** for a list of our clients from 2007-2012.

As you can see, a continuation of our relationship would be of great benefit to the Village of Wellington. We have extensive public relations/lobbying experience and knowledge about the political process at the Florida level. Through our connections, we can also provide the Village with skilled advocacy at the local and federal level. As you have seen over the past three years, we work tirelessly to reinforce our clients' positions on the issues that come up during the legislative session, and we continue to reinforce these communications and relationships throughout the year. With over 100 combined years of experience at Dutko Poole McKinley, we have demonstrated excellent judgment, character, and extensive knowledge of the legislative process, and we have excelled when the stakes have been high. For these reasons, we hope that you will choose to allow us to continue to work for the Village of Wellington.

Sincerely,



Fred O. Dickinson  
Vice President  
106 East College Avenue, Suite 1100  
Tallahassee, Florida 32301  
[Fred.dickinson@dutkograyling.com](mailto:Fred.dickinson@dutkograyling.com)  
Office: 850-681-1980  
Cell: 850-591-9930

## APPENDIX A

Select Year:  Select Type:  Select View:

## 2013 Legislative Principal

### Village of Wellington

#### Lobbyists representing principal:

[Fred O. Dickinson](#)

[Van B. Poole](#)

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Select Year: Select Type: Select View: 

## 2013 Executive Principal

### Village of Wellington Florida

#### Lobbyists representing principal:

[Fred O. Dickinson](#)[Van B. Poole](#)

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Entity Name Search

[Events](#)[No Name History](#)**Detail by Entity Name****Foreign Limited Liability Company**

DUTKO POOLE MCKINLEY LLC

**This detail screen does not contain information about the 2013 Annual Report.****Click the 'Search Now' button to determine if the 2013 Annual Report has been filed.****Filing Information**

**Document Number** M04000003835  
**FEI/EIN Number** 113726456  
**Date Filed** 09/15/2004  
**State** DE  
**Status** ACTIVE  
**Last Event** LC AMENDMENT  
**Event Date Filed** 04/03/2006  
**Event Effective Date** NONE

**Principal Address**

DUTKO POOLE MCKINLEY LLC  
106 E. COLLEGE AVENUE, SUITE 1100  
TALLAHASSEE FL 32301

Changed 03/12/2009

**Mailing Address**

DUTKO WORLDWIDE, LLC  
412 FIRST STREET S.E.  
WASHINGTON DC 20003

Changed 04/03/2006

**Registered Agent Name & Address**

MCKINLEY, WILLIAM T PRINCIP  
106 E. COLLEGE AVENUE  
SUITE 1100  
TALLAHASSEE FL 32301 US

Name Changed: 10/21/2005

Address Changed: 10/21/2005

**Manager/Member Detail**



**Name & Address**

Title MGR

HANLON, JANET  
412 1ST STREET SE, SUITE 100  
WASHINGTON DC 20003

**Annual Reports****Report Year Filed Date**

2010	02/03/2010
2011	02/07/2011
2012	02/28/2012

**Document Images**

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<a href="#">02/02/2006 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">10/21/2005 -- REINSTATEMENT</a>	<a href="#">View image in PDF format</a>
<a href="#">09/15/2004 -- Foreign Limited</a>	<a href="#">View image in PDF format</a>

[Previous on List](#)[Next on List](#)[Return To List](#)

Entity Name Search

[Events](#)**No Name History**[Submit](#)



## Appendix B – Client List 2007-2012

- 5 Star Claims
- Accenture
- Advanced Computers and Communications, LLC
- Accredited Surety & Casualty Company, Inc.
- AGL Recourses, Inc.
- American Tort Reform Association
- Blacklidge Emulsions
- Cash America International
- Capital Source
- Catapult Online
- City of Lauderhill
- City of Oakland Park
- City of Parkland
- City of Sunrise
- City of Sanibel
- Civil Justice Reform Group Comcast
- CompBenefits Company
- Comcast
- Connections Education
- Connection Academy
- Correctional Medical Services, Inc.
- Coreslab Structures (Tampa), Inc.
- Coventry Health Care
- Dale Earnhardt, Inc.
- eBay, Inc.
- Education Station
- Entertainment Software Association
- Erickson Living
- Everglades Trust
- Florida Association of Mortgage Brokers
- Florida Funeral Directors Association
- Florida Marlins
- FlyteComm, Inc.
- Florida Power and Light
- Gate Construction Materials Group, Inc.
- General Motors
- Guy Harvey Ocean Foundation
- Hayes e-Government Resources dba Hayes Computer Systems
- Hertz Corporation
- HNTB Corporation
- IdaTech, LLC
- Institute for Commercialization of Public Research
- IAC/InterActive Corp
- Keefe Commissary Network
- Learn It Systems
- Lucas Group, Inc.
- M of Tallahassee
- Match.com
- Magellan Behavioral Health of Florida
- Medtronic
- Metromont Corporation
- MGD Joint Venture, LLC
- Miami-Dade County
- Microsoft Corporation
- Motion Picture Association of America
- MultiState Association
- Nuphysicia
- Optimum Technology, Inc.
- Palmer Engineering
- Phoenix Physicians, LLC
- Plug Power, Inc.
- Port Everglades Pilots Association
- Power4Georgians
- P.R.I.D.E Enterprises
- ProtectingAmerica.org
- ResCare, Inc.
- RSC Equipment Rental, Inc.
- Rust Consulting, Inc.
- Sharp Electronics Corporation
- Seminole Tribe of Florida
- SNCF America
- SOS Children's Village of Florida, Inc.
- St. Joe Company
- Strategic Staffing Solutions, LLC
- Sunbelt Rentals, Inc.
- Tapfin Process Solutions
- Ten Media, LLC
- Tutor.com
- United Rentals, Inc.
- United Technologies Corporation
- Universal Orlando
- Univision Communications
- University of Phoenix
- Vanguard Car Rental USA, Inc.
- Versamed Medical Systems, Inc.
- Village of Wellington
- VINtek, Inc.
- Vista Health Plan
- Walter Kidde Portable Equipment, Inc.
- Wireless Generation, Inc.
- Wine Institute
- Worley Catastrophe Response

**ERICK'S CONSULTING, INC.**  
**AND**  
**ADAMS ST. ADVOCATES (ASA)**



March 6, 2013

Village of Wellington  
12300 Forest Hill Boulevard  
Wellington, Florida 33414

In re: Letter of Interest-State, Local and Federal Lobbying Services

It is with great pleasure that Ericks Consultants, Inc. (ECI) teaming with Adams St. Advocates (ASA), submits the following proposal to represent the Village of Wellington on matters of governmental affairs before Local Governments, Florida's Legislative and Executive Branches, and the Federal Government.

Through experience, dedication, knowledge of the political process and strong relationships, ECI continues into the new century as a highly effective governmental consulting firm. ECI is a full-service firm representing both corporate and public entity clients with legislative and state agency issues. Equipped with an in-depth knowledge of Florida government, we have experience with all state and local agencies, legislative committees and executive staff. Since its founding in 1985, Ericks Consultants, Inc. has represented some of Florida's top corporations and largest associations and has secured a place in Florida's political arena at both the state, county and municipal levels of government. This dual presence allows constant visibility in both the southern and northern regions of the state. Our South Florida office is located right off of Las Olas Boulevard in Fort Lauderdale and our Tallahassee office is one block from the Capital Complex.

ECI has joined forces with ASA to form an extremely strong alliance in the political arena to meet the Village of Wellington's current and future goals. ASA is a Florida-based consulting firm, established in response to today's fluid economic and political landscapes. ASA is a forward thinking, client centered group that provides extensive management experience in both the private and public sectors. ASA is passionate about helping clients reach their goals through a collaborative effort and will be focused on their needs from beginning to end. Simply, Adams Street Advocates, as the name implies, are advocates. Its team members have a long history at all levels in state and local government. Together they are a collective force committed to excellence and will work endlessly to achieve the results that Wellington not only desires, but deserves.

Along with this letter are three attachments, A-C, for your review. In Attachment A, we outline our knowledge, experience, skills, and dedication to offering the best service possible to our clients. Attachment B contains a list of our clients over the past five years along with our references. In Attachment C, we put forward our cost proposal.

The main contact for your Village will be Candice Ericks, who can be reached via her cell phone at (954) 648-1204 or email: [candice@ericksconsultants.com](mailto:candice@ericksconsultants.com).

We look forward to hearing from you and welcome the opportunity to present our proposal in person at a time that is convenient for the Village Council and staff members.

Sincerely,

David L. Ericks  
on behalf of  
Ericks Consultants, Inc. and  
Adam Street Advocates, LLC

WITH OFFICES IN FORT LAUDERDALE AND TALLAHASSEE

333 NORTH NEW RIVER DRIVE EAST  
SUITE 2000B  
FORT LAUDERDALE, FL 33301  
954-765-1207  
954-765-1224 FAX

205 SOUTH ADAMS STREET  
TALLAHASSEE, FL 32301  
850-224-0880  
850-224-5971 FAX

**ATTACHMENT A  
QUALIFICATIONS/EXPERIENCE**

**(1) Knowledge about the legislative process at the State, Local and Federal level:**

**State and Local Lobbying Experience**

Our experience provides us with a keen understanding of issues that local governments face as well as an understanding of new initiatives that Wellington will undertake. With vast experience representing local governments, we understand that legislative representation is critical to your success. We as a team offer unparalleled knowledge and experience in the political process, gained from years of direct participation. The members of ECI and ASA both have a reputation for working within the legal and ethical guidelines of the political world. Experience and personal relationships give us the ability to organize strong political support for our clients' issues, opposition to amendments that are disadvantageous to our clients, and sponsorship of legislation that is vital to our client's agenda. Reputation, access and expertise are the strengths of the ECI/ASA Team.

This unique alliance between ECI and ASA offers the Village of Wellington a proven, dedicated and respected South Florida home based team, as well as a seasoned Tallahassee based team that works and lives in Tallahassee year round. Combining the intimate knowledge of the South Florida based team with the Tallahassee year round presence is invaluable and critical to Wellington's success.

Having worked in both the corporate arena and the public sector, ECI/ASA have formed an efficient, experienced, professional team with an in-depth knowledge of Florida government and the ability to offer precise evaluations of legislation, amendments and bill analyses. We have particular expertise in state, county and municipal government, transportation, law enforcement, tourism and economic development, utilities, solid waste, human services, education and the environment. Our years of experience and hands on policy work in the municipal arena give us the understanding of how policy initiatives affect local government, both negatively and positively.

Each member of our team brings a wealth of knowledge to assist the Village of Wellington in its goals through our relationships, expertise and reputation throughout all levels of government. Collectively, our team has over 100 years of legislative experience including state, local and federal issues. Dave Ericks has been a registered lobbyist in the State of Florida for almost 30 years and has represented almost every form of government. His daughter, Candice, opened up the South Florida branch of ECI and has been with the firm for over 15 years and has been registered with the state. Claudia Davant has been a registered lobbyist in the state for 13 years with extensive federal experience prior to her move to Florida. Robert Beck is our team's budget expert. Robert has been on the inside of government for most of his career, including serving as the Budget Director for Governor Crist. He transitioned into the private sector about 5 years ago. We are supported by a seasoned office manager with over 30 years of experience, as well as trained associates and interns. Lauren Jackson, who recently joined the firm, worked for both Representative Evan Jenne and Senator Ellyn Bogdanoff. Lauren comes to ECI/ASA with internal knowledge of the legislative process from both the Senate and the House. We have experience with all state and local agencies, legislative committees and executive staff. The ECI/ASA team has long acknowledged the importance of support staff to legislators, commissioners and committees and has

WITH OFFICES IN FORT LAUDERDALE AND TALLAHASSEE

333 NORTH NEW RIVER DRIVE EAST  
SUITE 2000B  
FORT LAUDERDALE, FL 33301  
954-765-1207  
954-765-1224 FAX

205 SOUTH ADAMS ST  
TALLAHASSEE, FL 32301  
850-224-0880  
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successfully fostered solid, trust-based relationships with assistants, committee directors, analysts and attorneys.

The Florida Association of Professional Lobbyists [FAPL] was created to provide on-going training and professional development and is committed to promoting the highest ethical standards of professional conduct among its membership. David Ericks is a pioneer member of the Association and Candice Ericks has served on its Board of Directors for several years and has recently been reappointed. Our team is proactively engaged in many business-related lobbying organizations so that we have an understanding of what the business priorities are for the Legislative Session and how they will impact our clients. ECI is also a member of the Florida Association of Intergovernmental Relations (FAIR). Being a member of this group affords us the opportunity to utilize a valuable additional resource. During Session this group meets at least once a week to discuss and strategize on all Legislation that will affect local governments, e.g., transportation, growth management, public safety, etc. We have been a member of this group for many years and through this we have cultivated many working relationships and close ties between different levels of government. This participation enhances our knowledge and understanding of the challenges and trends that face Florida's municipalities, as well as all levels of government. Additionally, we work particularly close with the Florida League of Cities and the Association of Counties during the Legislative Session and will review all policies adopted by both the Florida and Palm Beach League of Cities, as well as other pertinent groups to keep Wellington apprised of issues.

#### **Federal Lobbying Experience**

Claudia Davant, who worked on the hill for a U.S. Senator, has a firm grasp of the federal process. She most recently was in Washington, D.C. with the Florida Afterschool Network lobbying the Florida Delegation on behalf of Florida's at risk children. All members of our team have relationships beyond state and local government and have access to most of the Florida delegation. However, since our focus is on state and local government we often team with Washington based firms to bolster our efforts if needed as part of our political strategy. Once we know more about Wellington's federal agenda we can help develop a plan that would best accomplish your goals.

#### **Please meet the members of our team:**

**DAVID ERICKS** is founder and President of Ericks Consultants, Inc. Dave moved to Fort Lauderdale when he was 13 years old and graduated from Stranahan High School. After returning from College at C.W. Post (Long Island University) on a football scholarship he took a position as a police officer with the City of Plantation, which transitioned him into the world of Florida politics. Dave Ericks has been a registered lobbyist in the State of Florida for almost 30 years, starting with his representation of the State of Florida Fraternal Order of Police while at the City of Plantation Police Department in 1980. Mr. Ericks was a registered lobbyist for the Broward County Sheriff's Department, the Department of Highway Safety and Motor Vehicles and the 3M Corporation before founding Ericks Consultants, Inc. in 1985. Prior to establishing his own firm, Mr. Ericks was employed by the 3M Corporation as Regional Administrator and Registered Lobbyist in Florida, Mississippi, Louisiana, and Alabama. Mr. Ericks served as Senior Executive Assistant to the Department of Highway Safety and Motor Vehicles, Administrative Assistant to the Broward County Sheriff and served on the City of Plantation Police Force. Mr. Ericks' past experience allowed him the opportunity to work with various police and criminal justice organizations, including the Steering Committee for Constitutional Amendments and the State Law Enforcement Job Task Advisory Committee for the Florida Police Standards and Training Commission. He has also represented members statewide as the President of the Fraternal Order of Police. His service in

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those positions has given him both law enforcement and administrative expertise at the local, county and state levels. Moreover, since establishing Ericks Consultants in 1985, Mr. Ericks has represented a multi-faceted group of clients, giving him a wide array of expertise in multiple subject areas, including the electric and telecommunication utilities, law enforcement, entertainment, healthcare, travel, corrections, solid waste, growth management, automobile, gaming, and transportation industries, as well as the many other diverse issues which face local governments on a day to day basis.

Mr. Ericks is a pioneer member of the Florida Association of Professional Lobbyists. Dave served as Chairman of the Tallahassee Downtown Improvement Authority for 3 years and continues to serve on the Board. He presently serves on the Advisory Board of Keiser University's Tallahassee Campus and previously served as a Board Member of the Florida State Fair Authority.

Mr. Ericks received his B.A. Degree from Long Island University and earned his Master of Science Degree in Criminal Justice from Nova University. He is also a graduate of the F.B.I. Academy's Law Specialist School in Quantico, Virginia and has taught as an Adjunct Faculty Member for Nova University.

**CANDICE ERICKS** is a consultant with Ericks Consultants, Inc., based in Fort Lauderdale, Florida.

Candice was born in Broward County and grew up in the City of Plantation. Prior to joining the firm 14 years ago, Candice began her career in corporate sales in New York City, specializing in outdoor advertising and temporary staffing. Upon her return from Manhattan in 1998, Candice opened the Fort Lauderdale branch of Ericks Consultants, Inc. Candice has developed an extensive network of contacts and relationships within state and local governments and the business community and works closely with the firm's South Florida based clients. Due to her work with an extensive array of clients, Candice has developed broad expertise in numerous subject areas.

Candice is active in many charitable organizations and serves as a Board Member of ChildNet, a not-for-profit organization working to protect Broward County's abused, neglected and abandoned children; the Florida Association of Professional Lobbyists, an organization committed to establishing and maintaining high standards for the lobbying profession; and Broward Days, an independent, nonprofit and nonpartisan group of people advocating for diverse needs and concerns of Broward County, Florida.

Candice was a member of Leadership Broward's Class of XXV, an organization that seeks to prepare members for leadership roles in their community. Candice was also featured by Gold Coast Magazine as one of Broward County's leading young professionals [40 Under 40] who were recognized for their professional and civic involvement in the local community.

Candice worked with Ericks Consultants, Inc. while attending Florida State University and interned during the 1994 Legislative Session in the Florida Senate. She graduated with a Public Relations and Political Science degree from Florida State University.

**Adams St. Advocates (ASA) Principals:**

**CLAUDIA DAVANT**, was the former Managing Partner a national firm's Florida practice for almost 4 years. While there, she built a broad multi-client practice that included information technology, local government, telecommunications, transportation, gaming, appropriations, healthcare, aging, education,

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and environmental issues with a niche practice around procurement driven clients and sales/business development strategy. She has extensive experience in government and private sectors.

Prior to this experience, Claudia was on the national business development team for Accenture, a global information technology firm, where she led sales campaigns for large, complex integrated systems opportunities. At Accenture, she was also responsible for government relations in Florida as well as many other states and worked closely with government entities at both the state and local level in that role.

Claudia moved to Florida in 2000 as AT&T's State President for Regulatory and Legislative Affairs where she worked hand in hand with key decision makers in both the Florida legislative and executive branches for 5 years. She subsequently was promoted to Regional Vice President for Legislative Affairs for AT&T where she successfully led legislative and regulatory reform campaigns in the Southern Region before the merger with BellSouth. In addition to her corporate experience, Claudia worked in government on both the state and federal levels. She served as U.S. Senator Strom Thurmond's Legislative Aide in Washington, D.C. for 3 years providing legislative analysis, constituent service and external communications. As a Policy Advisor to the Michigan House of Representatives, she led the staff effort to rewrite the Michigan Telecommunications Act. And, as General Counsel and Communications Director for the South Carolina Department of Commerce, she negotiated economic development incentives with corporations wanting to do business with the state.

Claudia currently serves on the Associated Industries of Florida (AIF) IT Council, Florida TaxWatch Board's Executive Steering Committee and Board, the Take Stock in Children Board and the Florida Afterschool Network Board. One of only nine recipients nationwide, she was recently honored by the Afterschool Alliance as Florida's Afterschool Champion of the Year at the "Breakfast of Champions" in Washington, DC.

A South Carolina native, Claudia earned her BA from the University of South Carolina Honors College and Law degree from the University of South Carolina.

**ROBERT BECK** brings unique and invaluable skills in public and private sector budgeting and appropriations, assisting our clients to build effective business cases that resonate with government decision-makers and procurement evaluation teams. Having served in senior roles in government including Staff Director of Senate Appropriations, Budget Director for the Governor of the State of Florida, Policy Advisor to the Senate President on Appropriations, Medicaid, and General Government, Robert has leveraged his extensive public sector experience to position private sector clients to effectively compete and win multiple agency procurements since reentering the private sector in 2008. Robert's experience in health care, criminal justice, and extensive experience with Medicaid has allowed him to effectively assist his clients in developing value propositions and procurement opportunities that resonate in today's fiscally challenging environment where agencies are continually confronted with a growing workload and shrinking resources to meet these demands.

Robert effectively leverages his executive branch relationships, having served in the Departments of Elder Affairs, Children & Families, Agriculture, Highway Safety & Motor Vehicles, and Management Services to create opportunities and interest by state agency stakeholders through effective communication and knowledge of agency needs. Robert understands the importance of effective business cases and sound return on investment analyses in a state government market that is becoming

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more and more driven to operate like a business, increase efficiency and reduce costs. Robert leverages his deep relationships in government and combines these relationships with solid business skills to create opportunities and encourage state government stakeholders to pursue them as good public policy.

**LAUREN JACKSON** recently joined Ericks Consultants as an Associate. Lauren has worked with both chambers of the legislature and both sides of the political aisle with a focus on issues specific to South Florida. Prior to serving on Senator Ellyn Bogdanoff's staff as her Broward County Coordinator, she served as the Legislative Aide to Representative Evan Jenne, the then House Minority Whip and Chair of the Broward Legislative Delegation. Although she is a Florida native, she holds a Political Science degree from the University of Utah with a minor in Campaign Management. Lauren has also worked on both local and congressional campaigns.

**JANET MORRIS** is the Office Manager for Ericks Consultants and works out of the Tallahassee office. Janet has an in-depth knowledge of the operation of the Florida Legislature and state government. Janet retired from the Florida House of Representatives in 2006 as a Senior Legislative Analyst in the Committee on Business Regulation. In her capacity on committee staff, Janet was responsible for the analysis of legislation dealing with alcohol, tobacco, general business and all gaming venues [lottery, pari-mutuels, slots, etc.]. Prior to her service on the Business Regulation Committee staff, Janet served as an Executive Assistant to the Speaker of the House and Majority Leader.

**(2) Previous public relations/lobbying experience and a network of contacts with policymakers:**

Our ability to represent our clients is reflected in the duration and loyalty of our business relationships throughout the State of Florida. ECI has a history of familiarizing themselves and forming strong, professional relationships with the members of city and county government, the Florida Legislature, cabinet offices, state agencies and staff. ECI has the proven ability to recognize the changing trends in the corporate and political worlds and uses those skills to organize, monitor, maneuver and communicate between government and client, giving both the comfort of understanding and the ability to offer compromise. ECI values its professional reputation and has spent years cultivating trust-based relationships within state and local government. We have a strong relationship with the Palm Beach County Delegation and staff, and we are confident that each member of the Delegation is comfortable working with ECI.

We currently represent the City of Coconut Creek [almost 6 years], the City of Coral Springs [12 years], the City of North Lauderdale [since 2009 and previously represented], the City of Pembroke Pines [for over 6 years], the Town of Davie [cumulatively almost 6 years], the City of Plantation [more than 7 years] and recently have been retained by the City of Fort Lauderdale. We have represented the Cities of Hollywood and Pembroke Park in the past. We also represent Broward County [for over 15 years] and Palm Beach County [over 6 years]. We believe that the experience gained from representing these local governments provides us the capability and understanding to meet the needs of the Village of Wellington.

Our firm is fortunate to have very good relationships with both sides of the political aisle, which allows us to represent our clients in a highly effective manner. Term limits have made it such that there is no longer an off season from the legislative session. We spend the entire year in close contact with Legislators and their staff regarding interim projects, campaigns and possible legislation for the

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upcoming year. In addition, we continue to focus on leadership in both chambers, and of course, the strength of our tri-county delegations. We believe that our most effective resources are those relationships that we have formed over the years. We take pride in the fact that we have outstanding professional and personal relationships with Legislators from both parties and their staffs, the Governor's office, with Cabinet officers and staff, and with key decision makers in state agencies. In fact, during a recent team planning meeting the ECI/ASA team went through the organizational charts of every executive branch agency and determined that we have good relationships and access to every agency! This access will be invaluable to Wellington for any and every issue that needs to be addressed.

It is especially beneficial to the citizens of the Village of Wellington that ECI and ASA have enduring relationships with House and Senate leadership. As you know, the Legislature and the Governor's office is led by an overwhelming majority of Republicans, and we maintain strong relationships with the Majority Party in Tallahassee at both the Legislative and Executive Branch levels. Currently, we have solid relationships with the Senate President and Speaker as well as their Chiefs of Staff. We have close relationships within the Governor's office with key deputies, decision makers and key influencers in the Office of Policy and Budget (OPB). It is important, however, to note that our team reaches across both sides of the political aisle, which allows for the Village to have a strong effective voice with all members.

Since many of Florida's Congressional Delegation began their political careers in the Florida Legislature, ECI and ASA have long-term relationships with a majority of the delegation.

As a proof of a successful track record lobbying our clients, we would like to provide a few examples of successes. Below are some of our accomplishments, beginning with local government issues and extending beyond.

**A few successes on behalf of local governments:**

**SFRTA**

For historic background, almost ten years ago ECI was instrumental in helping to pass legislation which transformed the Tri-County Commuter Rail Authority (TriRail) into the South Florida Regional Transportation Authority (SFRTA.) The new Authority was created with a vision to provide greater mobility in South Florida, thereby improving the economic viability and quality of life of the community, region and state.

The ECI Team was instrumental in the passage of major legislation that gave the Authority the power to issue, reissue or redeem bonds. Through ECI's efforts, the bill provided for discretionary bonding ability and gave the Authority the potential to receive matching funds of at least \$45 million if Broward, Miami-Dade and Palm Beach counties imposed a local-option funding source. This provision guaranteed that a dedicated funding source, either from the state, counties and/or a local-option funding source, was always available to the Authority.

Throughout 2008 and 2009, ECI worked with the SFRTA team to educate the legislature and other key executive agency decision makers on the critical need for additional dedicated funding.

In December 2009, the Florida Legislative Special Session culminated in successfully gaining Legislative approval for additional funding; specifically, the Legislature appropriated an additional \$15 million a

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year for five years to close the gap needed to run a full complement of 50 trains which directly benefits all of South Florida. This funding was critical to the on-going operation of the rail and picks up the shortfall caused by reduced funding from the county.

The Team successfully secured an additional \$1 million in funding during the 2010 Legislative Session. With a state budget short fall of over \$4 Billion, any increase in funding was a monumental accomplishment.

During the 2012 Legislative Session, Legislation was introduced to dramatically change the governance of the SFRTA Board based on recommendations by the Florida Department of Transportation (FDOT). It would have eliminated the three local representatives currently on the Board and provided for the ability to completely privatize the agency. After weeks of intense lobbying, a compromise was negotiated between SFRTA, FDOT and the Governor's office to preserve the local representation and allow the Governor additional representation without jeopardizing SFRTA's operating authority. This amendment required a complicated legislative strategy that was successfully implemented in multiple committee meetings on multiple legislative vehicles, floor support and passage. Ultimately, HB 599 was signed by the Governor and ECI is proud of the teamwork between SFRTA, Broward, Miami-Dade and Palm Beach. This huge undertaking that affected multiple counties clearly demonstrates ECI's leadership abilities to lead on complicated political and policy issues directly affecting local government.

### **Energy**

With the assistance of Senator Bogdanoff and Representative Moraitis, we were successful in amending both the House and Senate versions of the Energy Legislation (HB 7117) to include the words "commercial property". Adding this language expanded the ability of local governments to partner with commercial properties to further energy efficient projects which benefits local business and improves energy consumption.

The energy legislation was backed by the Commissioner of Agriculture that extended \$16 million dollars of tax credits for renewable energy. The bill also made a number of changes to energy laws to streamline and help implement a renewable energy plan state-wide. In addition to expanding the ability for biofuel permits the legislation allows for utilities to recover costs from consumers if the PSC makes such a determination after petition. Additionally, there is information on vehicle charging stations and privately owned electric charging on both energy consumption and the impact of the electric grid on the state. We mention some details of this bill because energy will continue to be a focus of future legislation

### **Seaports**

During the 2010 Legislative Session ECI and the coalition of Florida Seaports gained support for significant changes to port regulations. HB 963 by Representative Ray and SB 2000 by Senator Ring was Port Policy/Regulatory Relief legislation dealing specifically with the following: port conceptual permits, stormwater management systems serving overwater piers, reduction of match for rehabilitation of wharves and piers, flexibility language for FSTED program, funding process, dredging permits issued by DEP, public/private partnership authority, as well as providing an expedited process for the submission of work program amendments for seaport projects. ECI attended all committee meetings, as well as numerous meetings with the sponsors, other legislator and staff to ensure its passage.

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In 2011, ECI helped pass HB 283 by Representative Young/SB 524 by Senator Latvala. Florida at that time was the only state subject to both state and federal seaport requirements, including duplicative background checks and access cards. This of course put the state and specifically Port Everglades at a competitive disadvantage with other ports, as well as being costly to port users and workers. HB 283 repealed these duplicative regulations and was signed into law by Governor Scott at a special bill signing ceremony. (This legislation settled the differences of the FDLE card and the TWIC, Transportation Worker ID Card) Please note that this was an ongoing battle since 2009 and we are very proud of passage of this legislation.

In 2011 ECI was instrumental in working with the Ports Council to help pass language geared toward environmental processes, permitting language and seaport planning language. (Senator Ring and Representative Ray – HB 399) This legislation is beneficial to Port Everglades because of the maintenance dredging and streamlined permitting language.

In 2012, specific port funding for the South Port Turning Notch was eliminated from FDOT's five year work plan. ECI strategically led a coalition of business leaders from Broward County that included Port Everglades Board Members, members of the Greater Ft. Lauderdale Business Alliance and Broward County Commissioners. We then facilitated critical meetings with key legislators and agency decision makers to reinstate that funding in the appropriations process.

ECI was instrumental in working alongside the Ports Council to help pass monumental seaport legislation. Increased financial assistance, as well as streamline permitting legislation was put into place to benefit Florida's 14 seaports. We worked hard to secure additional money for the FSTED Program, as well as setting up a Strategic Port Initiative to benefit the future of Florida's ports. Our efforts resulted in an increase from the previous year and specific appropriations for Port Everglades are as follows:

Port Everglades \$1,100,000 for the Southport Turning Notch (project funded through FSTED)

Port Everglades \$12,000,000 for Southport ICTF on Port Rail Improvement (project funded through FDOT)

Port Everglades \$12,214,668 for Southport Turning Notch Expansion (project funded through FDOT)

FEC/ Port Everglades ICTF \$30,000,000 (project funded in the Intermodal line item)

### Charter Schools

ECI was instrumental in obtaining increases in appropriations each year for charter schools. We represent the City of Coral Springs and the City of Pembroke Pines on charter school issues. This has been an uphill battle over the years to gain support and appropriations for the charter school effort.

2001 - Increased from \$20 million to \$27.7 million

2006 - Increased from \$27.7 million to \$53 million

During the 2007 and 2008 Legislative Sessions - over \$54,000,000

2010 - \$56,112,466

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2011 - \$55 million appropriated with additional money for high performing charter school systems (note that both Coral Springs and Pembroke Pines are part of a high performing charter schools system)  
2012 - \$55,209,106 (plus additional funding available after allocation to the lab schools)

### Crime Lab

Crime lab funding has been a priority for the Broward County Sheriff's Office and Broward County for the last few years. Florida has five crime labs that are underfunded by the state. Prior to the 2012 legislative session, statutory authority allowed but did not require judges to impose an additional penalty to increase the funding for crime labs when they were used in the successful prosecution of a defendant. Invoking this additional fine was rarely imposed and it was not uniformly applied, which created significant shortfalls that the Sheriff's office and the County then had to subsidize with local funding.

Efforts led by ECI throughout 2010 and 2011 culminated in successful changes to mandate crime lab fees in 2012 legislation. Specifically, language was passed that would require a \$100 fee to be mandated when a person was convicted of a crime and the local crime lab was utilized. There are 5 local crime labs that are located in Broward, Palm Beach, Miami-Dade, Indian River and Pinellas Counties. Through ECI's strong relationships with the Broward delegation, support for the language to change the statute was garnered early in the process. This support resulted in Senator Bogdanoff (who was essential in previous efforts) committing to making it a priority during Budget negotiations. ECI worked tirelessly throughout the appropriations process attending all Budget meetings and worked alongside Senator Bogdanoff to gain support of both the House and Senate leadership to secure the House acceptance of the mandatory \$100 fee language. We were successful in getting the House to accept the language and Senate Conforming Bill 1968 passed both the House and Senate unanimously. Our understanding is that this language will provide an estimated \$5 Million funding for the crime labs.

During the veto period we worked diligently with the Governor's Office to answer questions and educate them on the user fee funding source contained in the legislation. Our arguments were persuasive and the bill was ultimately approved by the Governor.

### Crimes Against The Homeless

This effort was attempted for many years, prior to passage in 2010. HB 11 by Representative Porth and SB 506 by Senator Ring, added homelessness into the statute of Hate Crimes (reclassifying offenses evidencing prejudice based on the homeless status of the victim). Florida leads the nation in attacks on the homeless. After Maryland enacted a law based on some of the horrific incidences that we as a community faced here in Broward, Sheriff Lamberti contacted members of our Delegation to pursue this effort yet one more time. ECI worked with the sponsors, Commander Rick Wierzbicki and Broward staff through every committee meeting and numerous discussions with Legislators in both the Senate and the House to ensure passage of this legislation. Although it did not pass unanimously [25 yeas/10 nays], there was virtually no discussion on the floor when Senator Ring presented the bill to the Senate. However, some members of the House were quite vocal in their opposition to adding another Hate Crime to the statute that already included nine classes. Representative Porth gave a passionate argument and defense of the legislation. Ultimately, the vote was not close [80 yeas/28 nays] and HB 11 passed. The Governor came to Broward for a ceremonial bill signing at which members of our Delegation, the Sheriff and ECI were all in attendance.

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### Local Governments

In 2008, ECI was able to obtain \$500,000 for the Fire Training Simulator Tower for the City of Coral Springs.

In 2008, Claudia Davant was retained to help the City of Tavares secure funding from the FDOT for the development of commuter rail in Tavares. In addition to rail funding, Davant's team helped the City with various permitting issues related to the redevelopment of downtown Tavares. The Department of Environmental Protection had been unwilling to grant the City approval for the reconstruction of an overwater pavilion on Lake Dora. The Davant Team worked with state and local officials, as well as the Legislature and Governor's office, to get approval for the project. The City was not only granted all permits for construction, but the permits were expedited, saving the City over 12 months of project delays.

ECI was responsible for obtaining \$7 M for the Plantation Preserve Golf Course.

### Local Preemption Experience

Local preemption language is a constant battle in Tallahassee in numerous areas and we fight all session long for our local governments. Some examples of our experiences in this area include:

#### a. Growth Management

In 2009 ECI worked with Representative Schenk's office to place a conforming amendment on HB 73 regarding contracting with the Department of Environmental Protection. The language extends the ability to expedite permitting to charter counties with population over 1.2 million that have delegation agreements with DEP or WMD if they do so by resolution. (This bill was amended and passed.)

#### b. Solid Waste

In 2010, ECI worked closely with local governments and other interested parties to defeat preemptive language that would have ultimately dissolved solid waste franchise agreements between a city or county and a vendor. That language would have changed the definition of Construction and Demolition debris and would have put an end to previously negotiated and operating contracts. The last time there was a real attempt to change this language was over five years ago. We were also instrumental in defeating that initiative at that time.

#### c. Recycling

SB 570 by Senator Constantine was quite contentious during the entire 2010 Session. ECI worked with all interested parties to ensure that unachievable mandates to local governments and private business were not in the final piece of legislation. From the beginning we felt comfortable with holding unfriendly language at bay in the House, knowing that we had a fight on our hands in the Senate. The House introduced their language as part of a committee sponsored bill [HB 7243] under Representative Williams' direction. As the next few weeks unfolded, through countless discussions, amendments and negotiations, we were successful in ensuring that acceptable language was included in the legislation.

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d. Taxi Cabs

ECI has fought against and has always been successful in defeating pre-emptive language regarding taxi cab regulation for many years. The proposed language prohibits state and local governments from regulating the transfers of taxi cab licenses or shares in the corporation that owns those licenses. The language usually shows up within the last few weeks of Session. In 2009 it was filed as an amendment to SB 424 and onto HB 1021. In 2010 the language showed up during the last 2 weeks filed as an amendment onto HB 1271. The 2011 Session was a bit different. The legislation was drawn only to affect Hillsborough County. We met with the sponsor to ensure it would not affect Broward. Last year there was not an appetite to entertain the efforts although there was discussion.

e. Traffic Enforcement Cameras

ECI worked on and helped pass House Bill 325 that formalizes and governs the specifications for the red light cameras across the state. The bill allows local governments to contract with private contractors to install red light cameras at intersections. The bill provides that any red light infraction will result in a fine of \$158. If the county or municipality operates the camera, then the local government will retain \$75. If the state operates the cameras, then the local government will receive \$45. Under both scenarios, \$10 will go to the Department of Health Administrative Trust Fund and \$3 will go into the Brain and Spinal Cord Injury Trust Fund.

During the 2012 Legislative Session, there was legislation introduced and an attempt to repeal the red light camera law. HB 4087 by Representative Corcoran passed the House but was never taken up in the Senate. Since the Senate did not consider the repeal, the sponsor offered amendments to other transportation bills. One particular amendment seemed to gather support toward the end of the Session and may be back next year. The amendment would have required traffic studies to show that red light cameras would in fact make intersections safer. Other amendments that were debated included the prohibition on citations for red light right hand turns and enactment of specific yellow timing standards. ECI worked alongside interested parties against this effort for our cities, Palm Beach County and ACS. HB 91 has been filed for the 2013 Legislative Session by Representative Daphne Campbell calling for removal of the traffic infraction cameras. This legislation has passed its' first committee of reference in the House.

**Medical Examiner**

During the 2011 Legislative Session ECI facilitated a meeting with Steven Fielder, Director of Government Relations for the Department of Highway Safety and Motor Vehicles, regarding allowing our medical examiners to be given direct access to the DAVID database [Driver & Vehicle Information Database]. This database contains a motorist's identifying and emergency contact information, for the purpose of determining the identification of a deceased individual. Fielder was concerned about the number of examiners' ability to gain access. Through a lengthy discussion we agreed upon a number of roughly 20 (as the number across the state) that, pursuant to an interagency agreement, would have secure access to the database. Once DHSMV signed off on the agreed upon language we went back to Representative Moraitis who we had briefed prior to our meeting with DHSMV.

With the groundwork already set we started the 2012 Session touching base with Steven Fielder to make sure the Department was still supportive of our efforts. He gave us the green light and we

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immediately met with Representative Albritton and his staff to explain why our Medical Examiners should have direct access to the DAVID database. He understood, but also made it clear that only language that was agreed on by both sponsors (House and Senate) would make it into the final cut of the legislative package. We had our marching orders and went directly to Senator Latvala's office and met with his staff to explain at length the need we saw for direct access to the database and why we should be included in the legislation. From that point we were on constant follow-up with both offices up until the strike-all legislation was made public. We were very pleased that the database language was incorporated.

### **Palm Beach County**

In 2011 ECI was instrumental in securing language in the reorganizational legislation for enterprise zone boundary designations on behalf of Palm Beach County. Also, we were able to secure \$1.4 million in the budget during the Conference process for the Glades Senior Center/West County Homeless Resource Center. Although the \$1.4 M passed in the budget, this particular item, along with many other items, was subject to Governor Scott's veto power.

### **Property Appraiser Issues**

ECI worked with Senator Ring and Representative Holder to pass SB 1580 - partial property payments. This piece of legislation proved to be more difficult than we expected. There were many hurdles; however, with the help and dedication of Senator Ring, Representative Holder, Representative Bogdanoff and Representative Murzin, among others, we were able to get it through both chambers in the last few days of Session. What SB 1580 ultimately does is allows for taxpayers to pay their property taxes in partial payments. Before passage of this legislation the law did not legally allow the tax collector to collect the payment unless it was paid in full. This piece of legislation has been helpful to the Florida citizens in these difficult economic times.

### **Seminole Compact**

After years of negotiation, the Seminole Tribe of Florida and the State finally came together on a compact. The agreement comes after the Legislature challenged the first compact in 2008 and rejected compacts in 2009. The compact will allow the state to collect at least a billion dollars over five years.

The Seminole Tribe is authorized to conduct gaming at the following locations:

Seminole Indian Casino – Brighton, located in Okeechobee, FL, Seminole Indian Casino – Coconut Creek, located in Coconut Creek, FL, Seminole Indian Casino – Hollywood, located in Hollywood, FL, Seminole Indian Casino – Immokalee, located in Immokalee, FL, Seminole Indian Casino – Big Cypress, located in Clewiston, FL, Seminole Hard Rock Hotel & Casino – Hollywood, located in Hollywood, FL, and Seminole Hard Rock Hotel & Casino – Tampa, located in Tampa, FL

As a part of the Revenue Sharing Agreement between the state and local governments, the State will remit 3% of revenue received from the Tribe. Out of this 3%, Broward County shall receive 22.5% for revenue collected from the Seminole Indian Casino-Coconut Creek facility, and 25% for both Seminole Indian Casino in Hollywood and the Seminole Hard Rock Hotel and Casino in Hollywood. (The share was less for Coconut Creek due to more cities being included in the share than for the Hollywood facilities.)

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ECI was successful in negotiating a 5% fee to affected cities and counties in the original Governor's compact that was overturned by the courts. ECI then helped negotiate the eventually agreed upon 3% (down from 5% because the legislative compact was requiring a larger guarantee from the Seminoles in the final agreement) on the legislative compact. ECI was instrumental in ensuring the percentage cuts to Broward County and the City of Coconut Creek.

#### **Additional Successes:**

##### **Broward Center for the Performing Arts**

In 2012, ECI was successful in helping pass a bill for the Broward Center of the Performing Arts. The bill grants a public record exemption for publicly owned and operated performing arts centers. Before the bill passed confidential, sensitive, and personal information of the centers' donors were subject to public records requests. The bill was signed by the Governor and donors are now protected.

##### **Law Enforcement**

ECI was responsible for numerous pieces of legislation dealing with all areas of public safety. SB 214 which set the statewide standards for the training and use of dart firing stun guns. SB 428 which raised the per diem rates for travel expenses of public employees. HB 251 which created the Marvin Clayton Act, which is the database to fairly and correctly dispense the allocation for local law 175/185 premium tax revenues. HB 295 which increased the penalties for violators that attempted to flee or elude law enforcement officers. HB 749 the Duval County Sheriff's office pension plan legislation added correctional officers to special risk of their local law plan. SB 1792 which revised the number of members sitting on the Criminal Justice Standards and Training Commission and added the 180 day tolling or limitation period of actions against a law enforcement officer. HB 123 law enforcement officers' bill of rights, that stopped the 180 day tolling of an investigation during a declared state of emergency and clarified that law enforcement officers were entitled to be interviewed last during an investigation. HB 143 set state wide training standards for firearms training, bringing Florida in line with Federal Law Enforcement Officers Safety Act.

##### **Florida Atlantic University**

ECI worked with Tom Barlow, Director of Governmental Relations for Florida Atlantic University, to secure funds for identified FAU programs. ECI was initially hired to work on the FAU Davie Campus expansion. During the time ECI represented the University we exceeded our assigned goal and were instrumental in securing substantial funding for the university. In 2007, \$94 million in PECO funding, \$4.3 million recurring for their medical school expanding as 4 year program; \$18 million for a new engineering project; \$10 million for a general classroom building; \$18 million for the Davie campus expansion; \$8 million for the Harbor Branch Oceanic Research Center; and, an \$500,000 increase for a student-teacher program. During the 2008 Legislative Session, ECI successfully secured the final \$4.3 appropriation for the medical school as well as \$8.75 million for an ocean to energy project, \$52 million in PECO funding, \$9 million in student projects, and \$5 million for the Wellness Center.

##### **JM Family Enterprises**

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Historically, ECI has fought franchise legislation that would be harmful to the operation of JM Family Enterprises (Southeast Toyota). In the automobile industry, JM is unique in the sense that although they are a distributor, they also own a dealership. JM Family has a wonderful business relationship with its dealers, however, when it comes to franchise legislation JM normally takes the manufacturer stance. Overall, ECI has been successful in defeating franchise language or in negotiating legislation that is less injurious to JM Family. For example, during the 2009 legislative session there was a push to enact legislation that would have made it virtually impossible for a dealer to ever relocate. The language would also have nullified a provision requiring a franchisee to maintain and honor facility improvements that were in place through an already negotiated franchise agreement. ECI was successful in stripping the offensive language out of the bill on the last day of Session.

### **Afterschool Programs**

During the 2012 Legislative Session Claudia Davant helped lead the charge to prevent the passage of legislative changes that would have made 32,000 low-income children ineligible for participation in the afterschool programs they were currently enrolled in. She met with legislators and facilitated language supported by the Florida AfterSchool Network and other advocates for children and education so that the legislation that was ultimately passed met their goals for improving children's school readiness without blocking access to important afterschool programs. Claudia was named Florida's "Afterschool Champion of the Year" for her successful pro bono work on behalf of the Florida Afterschool Network.

### **Recent Budget Successes:**

ECI has in depth knowledge of the state appropriations process and has been successful in obtaining line item appropriations for our clients. However, the addition of Robert Beck, through Adams St. Advocates, to our roster brings an extraordinary insight and experience to the ECI Team. Robert is uniquely qualified in the legislative appropriations arena having been an appropriations staff director for the Florida Senate. In addition, Beck held the role of chief policy advisor on appropriations for the Florida Senate President in 2004 and 2005. In addition to his legislative appropriations experience, Beck has held senior executive appointments in budget leadership acting as the Governor's budget director under Governor Crist and also holding the budget director jobs for other executive branch agencies. Some of his recent accomplishments include:

- FY 2010-2011 – Preserved funding for home and community-based programs serving seniors in well over \$4 Billion was cut from programs in the State Budget. During the worse fiscal times the State of Florida has ever faced, Mr. Beck was able to secure several million dollars to increase Florida's Aging & Disabled Medicaid Waiver program.
- FY 2011-2012 - \$40 million increase for home and community based care programs for seniors including for Alzheimer's Projects & Services; Nursing home diversion program, Community Care for the Elderly, and local service programs serving Broward and Miami-Dade Counties.
- FY 2012-2013

\$ 23 million increase for home and community based care programs for seniors

\$ 11.4 million for the AIDS Insurance Continuation Programs which serves Broward County

\$ 2.5 million increase for AIDS Drug Assistance Program

\$ 4.4 million for Juvenile delinquency prevention programs

\$ 1.0 million of the Health Council of South Florida

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In addition to these recent appropriations secured through Mr. Beck's advocacy efforts, he also was an integral member of the 2012 Team led by Ericks Consultants to protect the SFRTA's base budget funding for commuter rail transportation and secured \$2 million for rail bridge replacement in Central Florida. Finally, Mr. Beck has helped his clients achieve success in the budgeting process in numerous cases through the development of State Budget Proviso language and development of numerous budget conforming bills critical to ensuring proper implementation of the budget following legislative session.

**(3) Strong communication skills to reinforce the clients' position on the issues at hand:**

Our approach will be an informed and educated one. Our relationships with leadership in both the House and the Senate afford us the knowledge of what the Legislature is focused on and an insight into what their challenges will be. We will proactively develop a strategy to successfully integrate the Village's needs into the Legislature's overall plan.

Our Tallahassee based team works one block from the Capitol Complex on a daily basis. Members of our Broward based team move to Tallahassee for the entire duration of the Legislative Session and stay through extended and Special sessions, in addition to having a full presence throughout every committee week. Our motto is "if they are in Session, we are in Session". We take pride in our dedication and work ethic when it comes to representing our clients. Session moves fast and decisions and legislation change quickly so having a large team at the capitol every day and living in Tallahassee during session is invaluable to your representation and success. Another advantage to having a team that lives in Tallahassee during Session is that travel has become so costly and difficult many members of the Legislature and staff spend their weekends in Tallahassee which provides additional opportunities to spend time with decision makers while the decisions are actually happening. We believe that being present at all times when decision makers and their staff are physically at the capital is vital to your representation. Knowing that we "live" at the Capitol during the legislative session is to the Village's benefit.

The ECI/ASA team will provide unparalleled representation to the Village of Wellington. We will work closely with the Mayor, Village Council, City Manager and staff in the coordination and development of the annual legislative agenda and appropriations requests, including holding workshops as necessary. Once the agenda and budget priorities are set, we will then identify key legislators, as well as staff in the Governor's Office, the Cabinet and Executive Branch agencies regarding our specific legislative and budget priorities. We will then continue to develop and implement strategy on proposed special or general legislation in coordination with the Palm Beach County Legislative Delegation, the Wellington Village Council, the City Manager and staff. Our team will be involved in drafting and analyzing proposed legislation, developing strategies and recommending amendments as necessary. We will create white papers, talking points or other educational documents to distribute to members as needed on important issues. We will arrange initial educational/ informational meetings amongst staff and members of the Legislature and executive branch agencies and will facilitate follow-up meetings as the priorities move through the legislative session.

We will continuously review existing and proposed state policies, programs and legislation, provide expertise on issues that we have collectively identified that may affect the Village of Wellington as well as continuously track bills and develop strategies for support, opposition or amending identified legislation. Our team will provide continuous assistance throughout the budget process, advocating for

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full-funding of the Village's project requests. Please note that Mr. Beck with ASA has extensive knowledge of the Florida budget process and has proven to work successfully within the extremely complicated appropriations world. In addition, we will also identify relevant funding opportunities and assist with grant requests. Keep in mind that many opportunities come up outside of the timeframe of the regularly scheduled Session and having a full-time extended team living in Tallahassee continuing to work at the Capitol is key. Members of our team will continue to work throughout the year with the Florida League of Cities and the Palm Beach League of Cities to review their policies. We will also maintain follow-up and appreciation correspondence throughout the process when appropriate.

We also know that competition for state funding has been nothing but fierce for the past 6 years due to Florida's revenue challenges – for six years in a row, state revenue collections have been insufficient to fund base budget expenditures. The need to develop a high-level 'return on investment' analysis to support your appropriation's priorities will also be key and we will work with your team to develop the necessary business case. Being successful in the appropriations process today requires an effective strategy that builds a compelling business case to support your appropriations request. Our team will work with you to build effective business cases needed to support your appropriations issues. Our goal in supporting and advocating on behalf of the Village of Wellington appropriations priorities will always be to present a strategic, compelling and focused message that differentiates and positions your appropriations requests.

Notwithstanding those resources, both ECI and ASA take full advantage of multiple electronic sources such as *LobbyTools*, for client research, bill tracking, news services and data management, which enable us to quickly provide up-to-date information on bills, amendments, committee meetings and breaking developments during the frenetic days of session. We also subscribe to News Services of Florida, an informational service that continuously alerts us to anything that is happening in the political arena in every area of interest.

Our team takes pride in the fact that we are in constant communication with our clients. Members of our firm will be available at all times via phone, text, or email to maintain vital lines of communication throughout Legislative Committee weeks and Session, including Special and Extended Sessions. The Village's designated staff will continuously receive updates via phone and/or email on issues of importance to Wellington.

#### **(4) The ability to respond to regulatory inquiries and testifying at public hearings:**

Our close relationships across agencies help us respond to proposed rule changes or new procedures. Administrative agencies routinely promulgate new and revised rules/regulations. ECI and ASA both constantly monitor the development of these proposed rules, which are developed via a formal 'rules hearing process' under Chapter 120, Florida Statutes. During these rule workshops, we work with the agency to ensure our client's interests are not unduly burdened by a newly proposed or revised rule. During the course of rule promulgation, we analyze the proposed policies for client impact – from a legal, operational, and fiscal impact – and provide public testimony during the rule-making process to shape the final outcome.

Many committee, administrative and rule making hearings and other important meetings take place outside of the legislative calendar. Having the ECI/ASA dual representation allows for firsthand knowledge and insight into what is happening throughout the year and the direct effects it may have on

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Wellington. In these tough economic times the regulatory and administrative process is equally important as the legislative process. Environmental permitting issues, economic development incentives and the process of determining the economic impact of unfunded mandates are just a few examples of issues that agencies address throughout the year. Although the hustle and bustle of Tallahassee calms down when session is over, we know that Wellington will constantly have issues with proposed bills, rulemaking, administrative bodies, court cases and perhaps even issues between the state and federal government.

Should there be a specific issue that needs detailed research, we conduct that research for our clients. We will provide privileged information to help you decide on the best strategic approach with options. For example: what cities, businesses and other legislatures are doing in other states on a particular issue. Members of our team will continuously track legislation throughout Committee weeks and Session, monitoring all state legislative committee meetings and agency hearings prior to, during and after Session, testifying as needed. We will appear, lobby and testify as needed before the Legislature, Executive Branch, state agencies, rulemaking proceedings, as well as the Palm Beach Delegation to promote, oppose or seek passage of identified legislation. We will also coordinate appointments and meetings between the Village Council and staff with appropriate state officials and legislators upon request.

**(5) Good judgment and the ability to take initiative :**

We believe that communication is the most valuable component of a client/lobbyist relationship and is the key to their mutual success. Insight and ongoing communication between the lobbyist and the client provides a better understanding of exactly what the client wants, allowing us to be successful in achieving the desired result. Our team will continuously apprise the Village of developing initiatives of which we believe you should be aware. This comprehensive understanding and interaction will provide the foundation for our ability to take the initiative on your behalf especially during those times during session when the pace is brisk and issues are being addressed rapidly. Our cumulative years of experience and success are strong confirmation of good judgment used on behalf of our clients.

**(6) The ability to manage high levels of stress and meet critical deadlines:**

ECI's experience and knowledge, combined with our strong relationships throughout the Legislature, allows us to cover a lot of ground within the legislative process. We pride ourselves on efficient coordination and organization that allows us to handle numerous tasks for multiple clients simultaneously. We believe that our long-term relationships with the majority of our clients are indicative of our past performance. In addition, ASA brings another team to the table to champion the Village of Wellington's efforts, with additional experts in the consulting and lobbying fields.

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**ATTACHMENT B  
CLIENT LIST/LIST OF REFERENCES**

**I. CLIENT LIST**

The following is a list of our clients sectioned by principal. We have separated the clients that we currently represent from clients which were represented within the past five years but we do not represent at the time of this submission. Please note that Adams Street Advocates (ASA) is a joint venture by members of established firms with previous clientele. The client list will reflect clients of Robert Beck and Claudia Davant respectively in addition to ECI and ASA, which are shared by all three firms.

**Ericks Consultants, Inc.**

**CURRENT:**

American Ambulance Service, Inc.  
American Marketing & Management, Inc.  
Broward Center for the Performing Arts  
Broward County  
Broward County Property Appraiser  
Broward Health  
Cash Bond Online  
Center Stage Attractions  
City of Coconut Creek  
City of Coral Springs  
City of Fort Lauderdale  
City of North Lauderdale  
City of Pembroke Pines  
City of Plantation  
Diplomat Properties Limited Partners, LLC  
Federation of Public Employees AFL-CIO  
Florida Sunshine Entertainment Association  
Florida Power and Light Company  
Fort Lauderdale Swap Shop  
The GEO Group, Inc.  
Gerstle, Rosen & Goldenberg, PA  
Herzog Contracting  
JM Family Enterprises  
Kendall Properties & Investments  
MERA Corporation  
Palm Beach County  
Seminole County Sheriff's Office  
South Florida Regional Transportation Authority  
Tindall Hammock Irrigation and Soil Conservation District  
Town of Davie  
United Healthcare of Florida  
United Pawnbrokers Group

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Waste Pro of Florida, Inc.

PAST:

Association of Settlement Companies  
AT&T  
BAGS  
Broward County Sheriff's Office  
Edify, LLC  
Federal Property Registration Corp.  
Gill Family Holdings  
Magellan Midstream Partners  
Republic

**Robert Beck-Pin Point Results**

CURRENT:

Children's Home Society  
Experient Group  
Florida Association Area Agencies on Aging, Inc.  
Florida Council on Aging  
Florida Coalition for the Homeless  
Harmony Information Systems  
Image API  
Kronos, Inc.  
NetApp  
Office of Public Guardian  
Presidio  
Robert Levy and Associates  
Thomas Howell Ferguson

PAST:

ACS State and Local Solutions  
Bearing Point  
Binson's Hospital Supplies  
Booth, Ern, Straughan and Hiott, Inc.  
Computer Associates, Inc.  
Educational Services and Products, LLC  
Executive Office of the Governor  
Evolent Tech, Inc.  
Inmate Health Services  
MARC USA  
ResCare

**Claudia Davant-The Davant Company**

CURRENT:

Acadamus Training, LLC

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Concordia Behavioral Health  
Correctional Healthcare Companies, Inc.  
Five Points Technology Group, Inc.  
Florida Afterschool Network  
Jacksonville Greyhound Racing, Inc.  
Safety Net Hospital Alliance of Florida

PAST:

Affiliated Computer Services  
ARAMARK Inc.  
Bearing Point  
Binson's  
Blackboard, Inc.  
Computer Associates, Inc.  
Dun & Bradstreet  
Economic Development Commission of Mid-Florida, Inc.  
Equaterra, Inc.  
Florida Association of Area Agencies on Aging, Inc.  
Florida Council on Aging  
Florida Optometric Association  
GovDelivery  
Inmate Health Services, LLC  
Kronos  
Lighting Science Group Corporation  
MARC USA  
MC Florida LLC  
Metro Traffic Schools  
Presidio  
ResCare  
Revenue Solutions, Inc.  
Reynolds American, Inc.  
Tree Top Software, Inc.  
VIAANT

**Adams Street Advocates, LLC**

CURRENT:

Aging True  
Capital Asphalt, LLC  
Cisco  
City of Ft. Lauderdale  
Coaxis International  
Everglades Foundation  
Information Systems of Florida  
Mitchell Brothers, Inc.  
Xerox Business Services, LLC

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## II. REFERENCES

Ericks Consultants is pleased to present the following professional references:

Company Name: American Marketing & Management  
Address: 888 SE 3rd Avenue, Suite 501, Ft. Lauderdale, FL 33316  
Contact Name: Austin Forman  
Telephone: 954-763-8111 Fax: 954-522-1969  
E-Mail Address: [af01@ammi.net](mailto:af01@ammi.net)  
ECI has represented this client since 2000

Company Name: South Florida Regional Transportation Authority [SFRTA]  
Address: 800 NW 33rd Street, Suite 100, Pompano Beach, FL 33064  
Contact Name: Vicki Wooldridge or Joe Giuliatti  
Telephone: 954-788-7934 Fax: 954-786-7505  
E-Mail Address: [wooldridgev@sfrta.fl.gov](mailto:wooldridgev@sfrta.fl.gov)  
ECI has represented this client since 1995

Company Name: Broward Health  
Address: 303 SW 17th Avenue, Ft. Lauderdale, FL 33316  
Contact Name: Charlotte Mather  
Telephone: 954-355-4174 Fax: 954-355-4774  
E-Mail Address: [charlotte.mather@nbhd.org](mailto:charlotte.mather@nbhd.org)  
ECI has represented this client since 2005

Company Name: JM Family Enterprises  
Address: 100 NW 12th Avenue, Deerfield Beach, FL 33443  
Contact Name: Sonya Deen  
Telephone: 954-429-2404 Fax: 954-429-2677  
E-Mail Address: [sonya.deen@jmfamily.com](mailto:sonya.deen@jmfamily.com)  
ECI has represented this client since 1996

Company Name: Broward County Property Appraiser  
Address: 115 South Andrews Avenue, Ft. Lauderdale, FL 33301  
Contact Name: Lori Parrish  
Telephone: 954-357-6904 Fax: 954-357-8474  
E-Mail Address: [lori@bcpa.net](mailto:lori@bcpa.net)  
ECI has represented this client since 2006

Company Name: City of Plantation  
Address: 400 NW 73rd Avenue, Plantation, FL 33317  
Contact Name: Mayor Diane Veltri Bendekovic  
Telephone: 954-797-2222 Fax: 954-797-2223  
E-Mail Address: [mayor@plantation.org](mailto:mayor@plantation.org)  
ECI has represented this client since 2005

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Company Name: City of Coral Springs  
Address: 9551 West Sample Road, Coral Springs, FL 33065  
Contact Name: Erdal Donmez  
Telephone: 954-344-5906 Fax: 954-344-1043  
E-Mail Address: [edonmez@coralsprings.org](mailto:edonmez@coralsprings.org)  
ECI has represented this client since 2000

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**ATTACHMENT C  
PROPOSED RATE STRUCTURE**

Our firm proposes to accept this engagement for the fixed annual fee of \$40,000. This fee is inclusive of all costs associated with the contract.

ECI will invoice the Village of Wellington monthly.

**THE MERCHANT STRATEGY, INC.**



**A Great Hometown...**  
*Let Us Show You!*

**Village of Wellington**  
**Request for Letter of Interest**  
**State, Local and Federal Lobbying Services**



Sharon J. Merchant, President

[Sharon@themerchantstrategy.com](mailto:Sharon@themerchantstrategy.com)

(561) 301-8930

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Mr. Ed De La Vega  
Purchasing Department  
Village of Wellington  
12300 Forest Hill Boulevard  
Wellington, FL 33414

March 5, 2013

Dear Mr. De La Vega:

The Merchant Strategy, Inc. (TMS) is pleased to submit a letter of interest for State, Local and Federal Lobbying Services to represent the Village of Wellington.

The team leads will be Sharon J. Merchant, a former Member of the Florida House of Representatives and Donald B. Mathis, a long-time employee lobbyist for Bell South. Both of these individuals have extensive relative experience.

Mathis represented Bell South in all city and county governments from Miami to Vero Beach and before all legislative and regulatory bodies in both Tallahassee and Washington, DC for 25 years. Merchant worked as a Legislative Assistant for a State Representative for 5 years and then served as a House Member for 8 years. Her relationships are statewide. Both Mathis and Merchant personally and or professionally know most Palm Beach County local officials and key staff, all of the Palm Beach Delegation, all Florida Members of Congress and both US Senators. Mathis maintains relationships with a number of Congressmen from other parts of the United States.

TMS offers government and public relations, crisis management, and business development. Our team members have testified before hundreds of legislative and regulatory hearings, negotiated many compromises, and seen passage of significant legislative and fiscal issues. Merchant chaired the Appropriations Committee on Transportation and Economic Development, and thus has an excellent understanding of the budget process.

We have extensive experience in both the public and private sector. We will design and implement the right strategy to meet the Village's objectives. We have succeeded in meeting deadlines, negotiated agreements, offered amendments, and have the initiative and tenacity to see our clients through the maze of government policies and procedures.

We appreciate the opportunity to compete for your business and look forward to being part of the Wellington team. I can be reached at (561) 301-8930 and [sharon@themerchantstrategy.com](mailto:sharon@themerchantstrategy.com).

Sincerely,



*Sharon J. Merchant*

Sharon J. Merchant, President

**TEAM EXPERIENCE**

**SHARON J. MERCHANT**

9 Graemoor Terrace, Palm Beach Gardens, FL 33418

SHARON J. MERCHANT

Sharon@themerchantstrategy.com

(561) 301-8930

**Key strengths:** *former State Legislator and legislative staff member; has represented numerous clients on state and local issues; strong relationships statewide and with local governments; business owner with 25 years of public and private sector leadership experience.*

**DONALD B. MATHIS**

mathisgrp@aol.com

(561) 329-3013

**Key strengths:** *a 25-year background in government relations in utility industry; has performed government affairs functions for a number of local Palm Beach County government entities; held leadership positions in numerous local organizations.*

**GENERAL QUALIFICATIONS AND BACKGROUND INFORMATION**

**SHARON J. MERCHANT**

A 5<sup>th</sup> generation Floridian, Ms. Merchant brings 25 years of public and private leadership experience as President of The Merchant Strategy (TMS), Inc., Vice President of a growing construction equipment rental business, and as a former Member of the Florida House of Representatives. TMS provides clients with expertise in the following areas:

- Government Relations, Public Relations, Media Relations, Strategic Planning, Public Involvement, Business Development and Crisis Management
- Federal, State, and local political, community and business contacts
- Experienced negotiator for economic development and growth management

- In-depth knowledge of Florida's budget, transportation infrastructure, water issues, telecommunication business regulation, agriculture and growth management

As a Member of the Florida House of Representatives, Merchant filed and passed 22 local bills for special taxing districts, Chaired the Appropriations Committee on Transportation and Economic Development, and was Vice Chair of the Utilities and Telecommunications Committee when Florida first deregulated telecommunications.

TMS provides consulting services to public and private sector clients such as Greenhorne and O'Mara, Suffolk Construction, STH LEO A DALY, Source Corp, Rinker Materials, Barnard Construction Company, GFA, Hypower, Inerjy, RedSpeed, The Weitz Company, Calvin, Giordano and Associates, the City of West Palm Beach, and Stanley Consultants.

### **Affiliations**

- Convention and Visitors Bureau, Board Member
- South Florida Fair, Director
- Florida Tax Watch, Board Member
- Palm Beach Executives Association, Member
- Associated Builders and Contractors, Member
- Daughters of the American Revolution (DAR), Past Regent
- Palm Beach Economic Forum, Member
- Forum Club of the Palm Beaches, Member

### **Awards and Recognitions**

- Six-time winner, Florida Chamber of Commerce Roll Call Award - Top 40 Legislators
- Executive Women of the Palm Beaches Women in Leadership Award
- The Nature Conservancy Legislator of the Year Award
- Florida Police Chief's Association Legislative Award
- Gulfstream Goodwill Industries, Inc. Award for Dedication to Persons with Disabilities (1st ever given)
- Florida Association of Women Lawyers Legislative Leadership Award
- Association of General Contractors of America Appreciation for Outstanding Service
- National Organization of Women Legislative Perseverance Award
- Florida Library Association Distinguished Legislator Award

Merchant graduated in 1986 from Florida State University, Tallahassee, Florida, with a BS degree in International Affairs. She is married to Daniel R. Turner. They reside in Palm Beach Gardens, Florida.

### **DONALD B. MATHIS**

Mr. Mathis' career of more than thirty-five years has been a broad base of diverse experiences and unique opportunities combined with a foundation of unusual academic accomplishments. He provides the real-world skills from twenty-five years with the BellSouth Corporation plus more than a decade of private consulting in a wide variety of industries and disciplines.

His twenty-five year career with BellSouth included executive level assignments in planning and budgets, operations, community relations, customer services, public relations and governmental affairs. He held positions with the telecommunications organization throughout South Florida from Vero Beach to Key West as well as an extended five-year stay in Washington, D.C. The Washington experience included a fellowship assignment as a staff member of the House Foreign Affairs Subcommittee on Foreign Operations.

Since retiring from the telecommunications company in 1996, his work has focused on the area of consulting in the fields of government relations (both legislative & regulatory organizations), crisis management, public relations, strategic marketing, community involvement, advertising and campaign management. The client base of his consulting organization ranges from Fortune 500 companies (Sikorsky Aircraft, Philip Morris, Service Corporation International, etc.) to local hotels, law firms, developers & entertainment groups. He also has worked for a number of government entities including the Port of Palm Beach, the South Florida Regional Transportation Authority, the Palm Beach County Planning, Zoning & Building Department, the Children Services Council, the Convention & Visitors Bureau, the Workforce Development Board and CDM on a Solid Waste Authority of Palm Beach County landfill project. One his most important projects involved working with The Scripps Research Institute to bring the California-based, world-class biotechnology facility to Florida.

His efforts in the government affairs arena have included lobbying of elected officials and critical staff members at the local, state and federal levels. He has advocated on behalf of clients in telecommunications, agriculture, retail services, manufacturing, healthcare, gaming, land development, banking and government organizations. Additionally, he has supported positions of non-profit organizations and public boards on subjects such as criminal justice, transportation, healthcare, education and the environment.

In the rapidly growing field of crisis management, Mathis has been involved in some of the nation's most highly publicized legal cases. His initial effort with a major corporate dilemma was his association with Philip Morris during the precedent setting tobacco case in Palm Beach County. Since that time, he has provided services to both corporate and legal teams for crisis situations in the legal services, healthcare, day cruising, aerospace, construction and funeral services industries to name a few. His most complex recent efforts have been working with the parent company of South Florida's Menorah Gardens in a case which has received extensive local and national media attention over the past few years.

Leadership roles in a variety of community relations efforts and political campaigns have provided Mathis with an unusually strong background in effective community outreach skills.

From strategic planning to message development to targeted delivery, he has the proven ability to create an environment where a client's message is clearly heard and delivers sound results. With a three decade-long track record of working with the media, Mathis has been involved in more than 500 TV interviews, hundreds of radio interviews/talk shows and countless print stories at local, state and national levels. He has faced the media on complex issues including corporate crisis, community debates, strikes, legislative challenges, regulatory rate adjustments and legal matters. His consulting work and media training sessions have prepared numerous corporate executives, elected officials and political candidates for both media interviews and public speaking events.

As an active member of the community throughout his career, Mathis has served on chamber of commerce boards in five different communities. He has taken leadership roles in community efforts in education, criminal justice, environmental protection, economic development, cultural services and fundraising for many non-profit organizations. The Economic Council of Palm Beach County, Pine Jog Environmental Education Center and SunFest are a few of the organizations that have elected him to the chairman of the board.

## **RECENT LEGISLATIVE ISSUE INVOLVEMENT**

### **SHARON J. MERCHANT**

**Camp Dresser & McKee, Inc (CDM)** - retained TMS as a consultant in January of 2009 to assist their team on a waste to energy Palm Beach County Solid Waste Authority (SWA) RFP, wherein CDM is one of three contractors, together with BE&K and B&W. CDM is a nationwide engineering firm, specializing in solid waste and water / wastewater projects,

TMS was retained to provide expert government and public relations and public involvement services targeting all stakeholders, including elected officials, opinion leaders and the general public. TMS provided strategy and public communications along with targeted public events to show the team's commitment to the environment.

TMS performed proposal analysis on each of the competitors, comparing and contrasting strengths and weaknesses. TMS recommended a number of actions to shore up the BE&K/B&W/CDM proposal for oral presentation. TMS staff coached BE&K/B&W/CDM team speaker to strengthen the overall presentation. TMS provided collateral materials and a logo with all three firms represented to brand the team, specifically B&W, the incumbent. We helped secure the required small business participation. We recommended and generated positive media, and responded to any negative media immediately to mitigate any potential damage. All issues are addressed and given a response and all stakeholders – Board of County Commission Members, the SWA Advisory Board, the public, union members, environmentalists, and the BE&K/B&W/CDM team were kept well informed.

**Camp Dresser & McKee, Inc (CDM)** - Retained TMS in 2009 to provide expert government and public relations and public involvement services to our client CDM, a nationwide engineering firm, specializing in solid waste and water / wastewater projects, for a project relating to the preferred site of a new landfill in West Palm Beach, Florida for the Palm Beach

County Solid Waste Authority (SWA). We developed collateral materials and a strategy for meetings with all local government leaders with municipalities within proximity to the sites and various scenarios, such as distance to residents, expenses, and the pros and cons of each, being considered for the landfill, to minimize objections and address the NIMBY problems before they materialized. With careful planning, many one on one and public meetings, thorough explanations of the need and of all ecological and safety precautions, TMS guided all stakeholders through the sticky issues and prepared the public to accept a site decision. Note: the SWA Board has deferred action on this item.

**Benchmark Design** (Benchmark) - Retained TMS as a consultant to strategize to defeat or amend legislation being considered by the 2012 Florida Legislature to repeal the Florida Renewable Fuels Standard Act (FRFSA) - SB238 and HB4013. This legislation negatively impacts the ethanol production industry in Florida in excess of \$50 million per the Senate staff analysis, discourages private sector investment in Florida and specifically limits the opportunity for successful new plants within the state. Benchmark Design is a small engineering firm that holds the patents on many ethanol facility designs.

TMS presented a full plan that focused on immediately meeting with all House and Senate Members that serve on committees that will hear these bills. Following those discussions, we proposed to meet with other key House and Senate Members, Cabinet Members, US Representatives and committee staff. Our services would be provided before, during, and after the Legislative Session. We facilitated discussion between legislative leadership, key professional staff, and Benchmark executives to present information re the economic importance of ethanol production in Florida. The legislation failed passage and Benchmark has a better understanding of the process, a plan of action and can effectively advocate for a successful outcome in future sessions of the Florida Legislature.

### **DONALD B. MATHIS**

In the previous three years, Mathis has been actively involved in a wide variety of governmental affairs projects at both the state and local levels. His work has included direct contact efforts with state, county and city elected officials and their key staff members. While much of his work has been centered in Palm Beach County, he has handled projects throughout the Southeast Florida coast as well as state government activities focused in Tallahassee.

In projects directly associated with the Solid Waste Authority, he has worked CDM on behalf the Authority in efforts to locate a western landfill and to generate Commission support to move forward with the mass-burn waste-to-energy (W-T-E) project now underway. Mathis worked in an attempt to resolve labor issues surrounding the rehab of the existing waste-to-energy plant at the Jog Road facility. Additionally, he was part of the winning team in the SWA bidding process to build the new W-T-E facility.

Aside from solid waste activities, Mathis has been part of efforts as diverse as the Palm Beach County's PZ&B EAR process (a state requirement to review and justify the elements of the County's Comprehensive Plan) – to generating support at both state and local levels

for the South Florida Regional Transportation Authority's (Tri-Rail's governing body funding and expansion planning efforts – to supporting the county's physicians and medical centers in securing funding relief from the Palm Beach County Healthcare District.

He has devoted much of the past three years to efforts with corporate clients in the areas of hospitality facilities, real estate projects, zoning conflicts, water resources and statewide healthcare funding issues just to name a few.

Combined with his past history of working for a number local government agencies like the Port of Palm Beach, Palm Beach County Planning, Zoning & Building Department, the PBC Convention & Visitors Bureau and the PBC Children's Services Council, Mathis has a proven understanding of the requirements necessary to successfully represent clients in both the private and public sectors on the most complex issues.

## **REFERENCES AND RECENT RELEVANT EXPERIENCE**

### **SHARON J. MERCHANT:**

#### **Solid Waste and Environmental Issues:**

CDM Smith – Kevin Leo, Principle Engineer, [leokc@cdmsmith.com](mailto:leokc@cdmsmith.com), (561) 689-3336

Provided expert government and public relations and public involvement services to CDM, a nationwide engineering firm, specializing in solid waste and water / wastewater projects for the Palm Beach County Solid Waste Authority (SWA).

#### **Independent Power Producers and Utilities:**

Benchmark Design – David R. Walker, President, (727) 669-7036, [benchmark@attglobal.net](mailto:benchmark@attglobal.net)

TMS was retained as a consultant to advise how to kill or amend legislation being considered by the 2012 Florida Legislature to repeal the Florida Renewable Fuels Standard Act (FRFSA) - SB238 and HB4013. This legislation negatively impacted the ethanol production industry in Florida in excess of \$50 million per the Senate staff analysis, discouraged private sector investment in Florida and limited the opportunity for successful new plants within the state.

#### **Financial Services**

Professional Locators Assoc – Pat Traylor, President, (727) 532-0900, [pattra.ils@gmail.com](mailto:pattra.ils@gmail.com)

TMS was retained to lobby the legislature and the Department of Financial Services to help the locators maintain statutory authority to continue reuniting lost property with the rightful owners. We worked with key House and Senate Members and DFS staff throughout.

#### **Special District and Local Government Representation:**

As a Member of the Florida House of Representatives, Merchant filed and passed a variety of local bills, including legislation re the West Palm Beach Water Catchment Area (*CH 96 – 477*), the Lake Worth Drainage District (*CH 96 – 478*), a Local Option Tourist Development

Tax to expand the use of the 4th cent of bed tax dollars allowing the Palm Beach County Convention Center to be built (CH 98-106), West Palm Beach Firefighters Pension (CH 99 – 456) and the Port of Palm Beach District (CH 99 – 457).

## **DONALD B. MATHIS**

### **Solid Waste, Environmental and Governmental Issues:**

**CDM Smith – Kevin Leo**, Principle Engineer, leokc@cdmsmith.com, (561) 689-3336

Mathis worked on behalf the Authority worked to locate a western landfill and to generate Commission support to move forward with the mass-burn waste-to-energy (W-T-E) project now underway. He worked to resolve labor issues surrounding the rehab of the existing waste-to-energy plant at the Jog Road facility.

**South Florida Regional Transportation Authority - Vicki Wooldridge**, SFRTA [wooldridgev@sfrta.fl.gov](mailto:wooldridgev@sfrta.fl.gov), (954) 213-8690

Mathis generated support at both state and local levels for the South Florida Regional Transportation Authority's (Tri-Rail's governing body) funding and expansion planning efforts.

**Florida Crystals – Danny Martell**, [dmartell@economiccouncilpbc.org](mailto:dmartell@economiccouncilpbc.org), (561) 531-3910.

Worked on a variety of issues including planning and zoning and water resources including the PBC Water Task Force efforts.

### **SMALL BUSINESS ENTERPRISE PLAN:**

The Merchant Strategy is certified SBE with Palm Beach County and MBE with the State of Florida. See attached certificate on page 11.

### **LOCAL PREFERENCE QUALIFICATION:**

The Merchant Strategy is located at 9 Graemoor Terrace, Palm Beach Gardens, FL, 33418. This is evidenced by Palm Beach County Vendor registration, Palm Beach County SBE certification, and Palm Beach County and Palm Beach Gardens Business Tax Receipts. See appendices.

### **PREFERRED METHOD OF COMPENSATION:**

The team fee is \$75,000 annually. We prefer to be paid monthly. Any extraordinary expenses to be approved by the Village Wellington in advance.

**CORRECTED**

**Palm Beach County  
Office of Small Business Assistance**

Certifies That

**The Merchant Strategy, Inc.**

VENDOR # **VC0000116090**

*is a Small /Woman Business Enterprise as prescribed by section 2-80.21 – 2-80.35 of the Palm Beach County Code for a three year period from May 4, 2011 to May 3, 2014.*

The following Services and/or Products are covered under this certification:

**Governmental Consulting Services  
Public Relations Consulting Services**

  
Allen Gray, Manager



**Palm Beach County Board of County Commissioners**

Karen T. Marcus, Chair  
Shelley Vana, Vice Chair  
Paulette Burdick  
Steven L. Abrams  
Burt Aaronson  
Jess R. Santamaria  
Priscilla A. Taylor

**County Administrator**

Robert Weisman  
**Deputy County Administrator**  
Verdenia C. Baker

05/16/2011



**NEIL SCHILLER-BECKER AND POLIAKOFF, P.A.**

***Response to Request for  
Letters of Interest  
For State, Local and Federal  
Lobbying Services***



**March 6, 2013**

Submitted by:

**Neil M. Schiller - Shareholder  
Becker & Poliakoff, P.A.**

Bank of America Centre  
625 N. Flagler Drive - 7th Floor  
West Palm Beach, FL 33401

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POLIAKOFF**  
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3111 STIRLING ROAD  
FORT LAUDERDALE, FL 33312  
800.432.7712 TOLL FREE

WWW.BECKER-POLIAKOFF.COM  
BP@BECKER-POLIAKOFF.COM

March 6, 2013

Reply To:  
Neil M. Schiller, Esq.  
Direct Dial: (954) 985-4117  
nschiller@becker-poliakoff.com

**VIA EMAIL**

Mr. Ed De La Vega  
Purchasing Department  
Village of Wellington  
12300 Forrest Hill Boulevard  
Wellington, FL 33414  
[edelavega@wellingtonfl.gov](mailto:edelavega@wellingtonfl.gov)

**Re: Request for Letters of Interest - Local, State and Federal  
Lobbying Services for the Village of Wellington**

FT. LAUDERDALE  
FT. MYERS  
FT. WALTON BEACH  
MIAMI  
MIRAMAR  
MORRISTOWN  
NAPLES  
NEW YORK  
NORTHERN VIRGINIA  
ORLANDO  
PRAGUE  
RED BANK  
SARASOTA  
STUART  
TALLAHASSEE  
TAMPA BAY  
WASHINGTON, DC  
WEST PALM BEACH

Dear Mr. De La Vega:

On behalf of Becker & Poliakoff, please accept this correspondence as our response to Request for Letters of Interest to provide the Village of Wellington ("the Village") with Local, State and Federal Lobbying Services.

We have carefully read the Village's request and have researched the Village's lobbying needs. We are excited about the opportunity to work closely with Village leaders to develop legislative strategies to meet your goals including securing grant money and appropriations for Village projects and/or programs.

Becker & Poliakoff ("the Firm") has a long history and successful track record of representing municipalities before local, state and federal governments (and their agencies) on funding and other critical issues. As a locally based law firm with a long-time presence in Palm Beach County (established 1981) that includes more than 150 attorneys and consultants in offices throughout Florida and the United States, we take pride in our ability to seamlessly represent clients at different levels of government from Palm Beach County to Tallahassee, and to Washington, DC. Further, we have active offices in West Palm Beach, Tallahassee, Washington, DC and Manassas, Virginia.

Mr. Ed De La Vega  
Purchasing Department  
Village of Wellington  
March 6, 2013  
Page 2

The Firm maintains a "one throat to choke" philosophy for our clients which enable you to contact one person at any time, irrespective of the issue. I will be leading the engagement on behalf of the Firm. As you can see from my bio (#8) of the attached, I have been very active in local, state and federal politics for many years in South Florida as both a political consultant and lawyer-lobbyist. This multi-faceted experience allows me to employ creative, out-of-the box strategy design and implementation to advocate my clients' positions. For instance, in representing a municipality on a state legislative issue, we designed a strategy to mobilize thousands of constituents to write postcards to other legislators sitting on a subcommittee in order to make our client's point. This was so successful that the targeted legislator called our client and asked them to stop sending postcards!

The advertised lobbying services for the Village of Wellington are very similar to the work we are engaged in on behalf of the Solid Waste Authority of Palm Beach County. For the last five years (our contract was recently renewed), we have represented the Solid Waste Authority of Palm Beach County locally in Palm Beach County, as well as in Tallahassee and Washington, DC on a variety of issues that range from non-profit collection bins locally to increasing the federal tax credit program for alternative energy producers. I am also the point person, along with our Federal lobbyist Omar Franco, for the Firm's representation of Palm Beach County in Washington, DC. As such, I am in regular communication with Palm Beach County staff and commissioners about their federal legislative issues.

In addition to my involvement, we propose that the Village will be represented by local government attorney Keith Poliakoff, Tallahassee lobbyists, Bernie Friedman, Yolanda Cash Jackson, Jose Fuentes, Rich Candia and Mario Bailey and in Washington, DC by lobbyists, Omar Franco, Clarence Williams, and Tom Barlow. Bios for all proposed team members are provided in #8 attached hereto.

Thank you for your consideration. We look forward to the opportunity to meet with Village leaders to discuss our proposal to assist the Village of Wellington in greater detail.

Sincerely,

A handwritten signature in black ink, appearing to read "Neil M. Schiller", with a long horizontal flourish extending to the right.

Neil M. Schiller  
For the Firm



**1. Knowledge about the legislative process at the State, Local and Federal level.**

Becker & Poliakoff provides its clients with a full range of legal and lobbying services and prides itself on having numerous long-term clients including municipalities, special districts, non-profits, trade associations, and businesses for which we lobby locally, in Tallahassee, and in Washington, DC. Lobbying and local government law has been among the core practice areas of the law firm since its founding in 1973. Firm founder, Alan Becker served in the Florida Legislature in the 1970's and has maintained a strong network of political and business leaders throughout Florida serving on the Executive Board of Enterprise Florida, Past Chairman of the Beacon Council, Florida Atlantic University's Foundation just to name a few of his high profile positions.

Our Government team prides itself on our diversity, bi-partisanship and knowledge of the legislative process. The team includes several attorneys and lobbyists who currently serve, or have served, in high-level government positions (local, state and federal) and therefore, have first-hand working knowledge of government practices and procedures. As an example, DC lobbyists **Omar Franco** and **Clarence Williams** each served as Chief of Staff to Florida Congressmen (a Republican and Democrat, respectively). State lobbyist **Jose Fuentes** worked in the House Speaker's office and served as Regional Director for the South Florida Water Management District. We understand governmental operations, processes, and needs from the inside. In fact, each member of our Government team has long-time, personal friendships with many of Florida's leading policymakers and elected officials, including Florida Cabinet members, Legislative leaders in the Florida House and Senate, Mayors, City and County Commissioners as well as members of the Florida Congressional Delegation.

Our clients benefit from the Firm's statewide network of offices (12 in Florida) which gives us the advantage of knowing elected officials and key staff members throughout Florida. Additionally, with term limits creating significant movement between elected offices by elected officials, our local government practice and local office network offers a unique opportunity to know elected officials at every level of government.

In summary, we have had great success on many different issues and in various venues because of our 1) insider's knowledge of government; 2) creative and resourceful strategic thinking and implementation; and 3) unwavering commitment to achieving our clients' goals.

2. **Previous public relations/lobby experience and a network of contacts with policymakers.**

Representing local governments has become a niche practice for Becker & Poliakoff. We have had great success for several municipal clients because we gain an intimate understanding of the municipalities' needs and goals by getting to know city leaders, staff and city's needs in order to uncover opportunities for state and federal funding and other grants through untraditional sources. Additionally, we have strong ties to both sides of the aisle and experience on numerous municipal related issues.

We have been at the forefront of major policy issues over the last several years on behalf of our clients at all levels of government. Our team's "secret" formula for success is that we are obsessive about learning the institutional history behind an issue, reading every piece of legislation, including amendments, to ensure that our clients are protected. This practice helps us to position our clients to be successful, by knowing what legislation is moving, what legislation is "dead on arrival"; who are the champions and who are the antagonists; which committees are friendly and which will hide a bill from ever seeing the light of day. Legislative intelligence is the key to effective lobbying. Our team knows where to get it and how to use it to represent our clients.

***Previous Lobbying Experience at the Local, State and Federal levels***

**Locally**, we represent a number of clients before Palm Beach County, including Professional Probation Services, T-Mobile, Plante and Moran, Oracle, Metro Mobility Management Group, Southeastern Florida Transportation Group, Crowe Horwath, and G.L.Homes to name a few. In addition to staying abreast of political and policy issues, Neil Schiller has established a solid network of staff contacts throughout the Palm Beach County administration. This network provides unique opportunities to advance our clients' interests without the need for public hearings while still being in compliance with the Sunshine Law. Further, Neil has established a reputation for himself as a "deal-maker" and has been successful reaching mutually acceptable compromises, rather just than fighting for the sake of fighting. Lastly, every year in Tallahassee, we have hosted a dinner for County Commissioners and Staff at the start of Palm Beach County Days. These "no agenda" dinners are very-well attended by all aspects of the current and future leadership of Palm Beach County to interact and mingle out of the office.



*Some of the more controversial issues we've handled locally are:*

*Non-Profit Drop Off Dumpsters:* The Solid Waste Authority (SWA) asked us to monitor this local Palm Beach County issue, wherein Planning and Zoning Staff were considering requiring the Authority to submit site plan amendments for each of their facilities that contained a "drop-off dumpster." In conversations with SWA staff, we developed a strategy to propose an alternative plan where the County would use a permit system to regulate the "drop-off dumpsters" with a provision that exempted public owned facilities. While this issue has not been concluded, indications from the SWA and the County Attorney's office are that the permit system may be recommended course of action.

*Town of Southwest Ranches:* as part of our representation of the Town we have been at the forefront of preserving the Town's unique equestrian and agricultural history, despite the outsourcing of code enforcement and public safety services. We helped the Town review the options they had with respect to public safety services and assisted with the negotiation of interlocal agreements with the City of Pembroke Pines and the Broward Sheriff's Office.

*Paratransit Service:* our client Metro Mobility Management Group, won the RFP to be the sole provider for Paratransit services for the County. As you've read in the newspaper, Metro has gone through some unfortunate growing pains since starting their service in August 2012. Even as the complaints mounted, Neil helped Metro navigate the impending political firestorm to not only avoid the potential contract termination, but he has also helped Metro cement its service by facilitating several meeting with the County's administration to come up with viable solutions, and in fact expand their service.

*Sober Houses:* we represent a private property owner who is working to protect his neighborhood from the infiltration of sober houses. While we have worked through the County's zoning staff to determine our options, we are working with the Palm Beach League of Cities to address the regulation of sober houses and rehabilitation centers in residential areas through state legislation.

*Cell Phone Towers:* we represented T-Mobile in a dispute with a neighboring homeowners association over an existing communications tower adjacent to their neighborhood. In an effort to address the community's concerns, Neil worked with County Commissioner Aaronson and his office to bring the necessary County staff to the table with the affected parties to figure out an agreeable resolution. After months of negotiations and mediation sessions we finally agreed on a final outcome in which the homeowners association, T-Mobile and the County all were happy with.



*Broward County Regional 911:* we represent the City of Lauderhill at the Broward County Commission when the County's regional 911 service began to be questioned by the Sheriff and County Commissioners. Essentially, there was a previous interlocal agreement amongst some of the larger cities in the County that paid for the 911 service for every other city in the County. As the smaller cities began to grow and draw more from the system, the larger cities wanted to change the deal to require the smaller cities to pay their fair shares.

**At the State level**, our client list includes: City of Cape Coral, City of Hollywood, City of Homestead, City of Lauderdale Lakes, City of Lauderhill, Florida Association of Jewish Federations, Miami-Dade County, Miami-Dade Expressway Authority, Palm Beach County, Solid Waste Authority of Palm Beach County, Town of Cutler Bay, Town of Davie, Town of Southwest Ranches, and other local governments as well as private sector clients such as American Traffic Solutions, AT&T, Isle of Capri.

Some of the larger state legislative issues we've been involved with recently include:

**Solid Waste Authority of Palm Beach County -**

*Non-Ad Valorem Special Assessments:* When the economy was at its lowest point, legislators spoke out against any potential tax increases and vowed to cut taxes. Much of this rhetoric focused on local government and special districts. We've tracked several bills that would have impacted the SWA's ability to levy and collect special assessments. Luckily these bills had no realistic chance of getting the floor of the legislature, but the awareness was important when monitoring floor amendments and different committee bills. Our number one priority was and is to maintain SWA's ability to be funded with non-ad valorem special assessment revenue.

*Special Districts:* It is no secret that Governor Scott does not like Special Districts and in his first term, has made it a priority to "sunset" as many of these as possible. While the SWA is not in his sights, it has been vitally important that we continue to monitor all legislation that could impact the Authority and how it does business. There have been several bills over the past three years that if passed would have impacted the SWA; however they never had a chance of passing.

*Florida Retirement System ("FRS") Reform:* The SWA asked us to start tracking this issue in 2010 as a number of your employees are members of this benefit. We had already been actively monitoring this legislation for our municipal clients including: City of Cape Coral, City of Hollywood, and City of Pompano Beach. While meaningful FRS reform is always talked about in the weeks leading up the Legislative Session, there haven't been any bills that have substantially altered the system and/or significantly reduced benefits for those enrolled.



*Environmental Issues:* Barlow Consulting successfully lobbied the Legislature to fund the Voluntary Cleanup Tax Credit at \$5,000,000 per year. This fund reimburses private entities for remediating Brownfield sites and restoring the property to be used for a “useful purpose.”

On behalf of **Miami Dade County**, we worked successfully to secure dedicated funding sources for Port of Miami. We helped to facilitate meetings with County and Port officials, legislators, and staff to pass legislation that would provide more support to Florida’s seaports. We worked with the bill’s sponsors to shepherd this significant piece of policy/regulatory relief legislation through the legislative process. The legislation unanimously passed in all referred committees in both Chambers

*Local Government Revenues:* the Team helped defeat a measure to end the local business tax and successfully lobbied for the inclusion of 3 transportation projects totaling of 500k to be placed in the state’s budget for these three cities: **Miami Garden, Lauderdale Lakes and West Park.**

*Municipal Projects:*

For the **City of Cape Coral**, we successfully enacted changes to F.S. 163.3182, the Transportation Concurrency Backlog Authority in SB 682. The existing statute is unworkable as it limits sources of funding (i.e. debt) terms of debt repayment and many other issues. The new statute will address areas of significant transportation deficiencies and inadequacies such as State Road 78 in Cape Coral – Lee County. The Bill changes F.S. 339.135(5) which increased the cap of reimbursement for projects to \$250,000,000. This is critical to the funding for State Road 78 project. Del Prado Road Widening Funding \$4M:

We also worked with House and Senate budget committees to ensure that any proposed cuts would not defer approved projects for TRIP funding and secured \$135,000 grant for park improvements for Chantry Park. The grant will help pay for trails, lighting, restroom replacements, picnic facilities, boat ramps, and other improvements at Chantry Canal Park at the southern most end of S.E. 24<sup>th</sup> Avenue. The grant was funded by the Florida Department of Environmental Protection—Florida Recreation Development Assistance Program.

For the **City of Miami Gardens**, we secured \$100,000 in funding for the City’s Drainage Improvement Project, and worked with the Florida League of Cities to successfully defeat legislative attempts to place spending revenue caps on local government, and any further property tax reform measures.

For the **City of Opa-Locka**, we secured \$100,000 in funding for Cairo Lane Stormwater Drainage Improvements, \$100,000 in funding for the City's NW 143rd Street Stormwater Drainage Improvements, and \$76,049 in FRDAP funding for the City's local park project, Ingram Park's Lakefront.

For the **City of Pompano Beach**, we secured \$125,000 in funding for the City's Chlorine System Conversion project, and \$135,199 in FRDAP funding for the City's local park project, Pompano Community Park Amenities.

For the **City of West Park**, we secured \$250,000 in funding for the City's SR7/US 441 Stormwater Improvements.

The **City of Lauderdale Lakes** was denied an initial reimbursement of \$174,277 from the Division of Emergency Management (DEM) to strengthen the City's City Hall/Public Safety Complex. We worked with the offices of Representative Hazelle Rogers and Senator Chris Smith to arrange conference calls with City staff and DEM officials involved with the mitigation project. We were able to secure DEM funding to cover approximately \$90,000 of the project.

We successfully worked to pass House Bill 1215 which was the **Town of Southwest Ranches** local bill. This bill amends the statute whereby the Town can appoint two members to the South Broward Utility Advisory Board allowing the appointment of any Southwest Ranches nominee that is either a water or sewer user within the service area. Before the passage of this bill, the Town could only appoint someone who was a user of both water and sewer.

*Red Light Cameras:* On behalf of **American Traffic Solutions**, we helped draft legislation and amendments to allow municipalities to use "red light cameras" as a means of fining those who violate traffic safety laws and passed HB 325, the Mark Wandall Traffic Safety Act. In addition, we crafted and executed the legislative strategy to pass the bill. As you know, this remains a very controversial issue today as opponents continue to try and repeal the law. We have been successful in opposing these efforts in 2011 and 2012.

*Ocean Outfall:* One of the **City of Hollywood's** top priorities was to fix a glitch in the Ocean Outfall State law that has passed the year before. Existing law placed a disproportional reuse burden on regional wastewater systems like Hollywood if flows were diverted away by one or more users. Originally DEP told Hollywood that they could fix this issue by Rule and did not need a statutory change. After much discussion, it was decided that a change in statute was needed. We spent several months working with DEP and Representative Gibbons and Senator Sobel on Legislation that would provide a credit for reuse from diverted flows to the facility



discharging through Ocean Outfall. SB 550 passed and was signed into law by the Governor. We have been at the forefront of this and other water-sewer related issues and have been successful in working with the Florida Department of Environmental Protection on behalf of our clients.

*Gaming:* Passed legislation reducing tax rate on Florida pari-mutuels that have slot machines from 50% to 35%. This will result in a savings of tens of millions of dollars to the **Isle of Capri** and allow them to reinvest in the Casino and hire more employees. Attended dozens of meetings and hearings with the Seminole Indians and pari-mutuels to work on the compromise Compact that ultimately passed the Legislature and was signed into law by the Governor. The passage of the Compact triggered the tax reduction and other positive changes for the South Florida non-Indian casinos.

**Federal Clients and Projects:**

In Washington, D.C., our clients include: Algenol Biofuels, Avanti Wellness Center, City of Hialeah, City of Hialeah Gardens, City of North Bay Village, Cortiza Construction Group, Dade Medical College, Florida Gulf Coast University, Florida Memorial College, Gold Coast Florida Regional Center, Hi-G-Tek, IKEA North America Services, International Bancshares Corporation, Intuit, Jetaire Aerospace and Technology, Friends of the National Museum of the America Latino, Fuentes Rodriguez Consulting Group, Palantir Technologies, Palm Beach County, Prometrix Consulting, Realauction.com, Secure Wrap, STS International, Town of Southwest Ranches.

Under Managing Director Omar Franco, Becker & Poliakoff has achieved many federal funding successes for his clients in each annual appropriations cycle and is intimately familiar with the processes by which earmarked and program-funding proposals are drafted and approved at each step of the legislative process. Omar has extensive expertise and experience in effectively securing federal appropriations dollars for municipalities and other local governmental or quasi-governmental agencies. Omar successfully lobbied for federal appropriations funding for the following municipalities and governmental entities:

For the **City of Hialeah** Omar worked to and secure \$500,000 for the street and sidewalk improvements in the FY-10 Transportation-HUD Appropriations bill. Omar also worked to secure federal \$250,000 for the police equipment upgrades in the FY-10 Commerce-Justice-State Appropriations under the COPS account.

The City was requesting federal funds to complete the reconstruction of the West 24th Avenue corridor from 52nd Street to 76th Street, as well as West 76th Street, from 20th to 36th Avenues. The federal dollars would be used to enhance storm water

drainage, improve the lighting, sidewalk, and curb/gutter and to add additional center turn lanes and an additional lane in either direction.

The City's police department's radio system did not allow for radio interoperability among other law enforcement agencies, especially important during times of statewide response to natural disasters, domestic security incidents or multi-agency jurisdictional public safety efforts. The City needed to upgrade to the XPS radio system that would bridge the current gap and achieve interoperability with the State of Florida by replacing and upgrading fixed end, portable and mobile radio communication equipment.

In the **City of Miami Lakes**, our team worked to secure \$570,000 in FY-09 Transportation-HUD bill for vehicle procurement of two hybrid electric vehicles to provide this trolleybus service.

The City of Miami Lakes, Florida was seeking to enhance its existing transportation program, specifically, the general circulator trolleybus service routes. The driving force behind the transportation initiatives was to decrease traffic congestion and increase economic development via mass transit development projects. The general circulator service with scheduled bus routes, installation of bus shelters and benches, and upgrades to street signs—to name a few.

Our work for the **Miccosukee Tribe of Indians** included the Tamiami Trail safety improvement project for the FY-10 Transportation-Housing & Urban Development Appropriations bill. Omar also worked on getting the former Congressman Kendrick Meek, Congressman Alcee Hastings, and Congresswoman Debbie Wasserman Schultz to submit the project for consideration. In December 2009, Congress passed the Conference Report for the Omnibus Appropriations Bill. Included in the bill was \$1,750,000 in the Federal Highway Administration Federal Lands – Public Lands Highway Account for the Miccosukee Tribe to fully fund the Tamiami Trail safety improvements project. Omar also secured \$760,000 for the Snake Road Improvements to address significant safety concerns associated with Snake Road (BIA). For FY-11, \$1.1 million for road resurfacing was included in the Omnibus bill that failed in Congress.

The Miccosukee Tribe Headquarters is located on Tamiami Trail, U.S. 41, on the Miccosukee Reservation. The entrance to the Headquarters leads to all of the housing for all Tribal members as well as the school, clinic, court and all other government offices. The entrance is a two-lane highway where speed limits are reduced upon approach from 55 M.P.H. to 45 M.P.H. However, many accidents, resulting in severe



injuries and damage to Tribal members and tourists alike, have been reported at this section of Tamiami Trail because of the deceleration needed to safely turn into the Headquarters. To significantly reduce the danger of serious accidents occurring, the creation of turn lanes from the east and west is needed.

In 2009 after several years of work, the **City of North Bay Village** received notification that they had been awarded \$4,655,012 to completely rehabilitate the existing 12,000 feet of 12-inch force main that crosses the Biscayne Bay. The City received \$475,000 in for a Bus Facility Project within the new Municipal Public Safety Complex with the assistance of Omar.

For forty-two years, wastewater from North Bay Village was pumped through the same pipe travelling more than two miles to Miami Beach to be processed. This force main pipeline rested on the floor of Biscayne Bay and was exposed to hazards such as impacts from boats. Damage to the pipe was accelerated by corrosion and age. This pipeline had caused six spill accidents since 2005 and was causing continued environmental damage and health risks to North Bay Village and all the surrounding communities. The City had initiated planning work to replace the pipeline, rerouting it to the west to the City of Miami since North Bay Village was placed under a sewer moratorium from Miami-Dade County and a consent order from the Florida Department of Environmental Protection.

In 2009, members of the team began working with the City of North Bay Village to see if federal funding would be available to begin work on this project. Omar worked with North Bay Village and submitted this project request to Congresswoman Debbie Wasserman Schultz and Senator Bill Nelson's offices. In the midst of that appropriation cycle, Congress passed the American Recovery & Reinvestment Act (ARRA) and federal funds for "shovel ready projects" also became available. Working closely with Congresswoman Debbie Wasserman Schultz's office, we resubmitted the appropriations request as an ARRA project request.

Under our contract for **Palm Beach County**, we have focused on finding and filing grant opportunities for Federal funding for the Urban Area Security Initiative as well as other grant opportunities for transportation and water projects. We have worked with a myriad of other organizations to augment Federal grant opportunities

For the **Town of Southwest Ranches**, we worked exclusively to lobby the Department of Homeland Security to locate their controversial ICF detention facility within the Town, which included dozens of Washington, D.C. meetings with top



officials from Homeland Security, the Department of Defense, Congress and the Administration. In addition we have begun to investigate grant opportunities for the Town to address several upcoming infrastructure projects.

3. **Strong Communicaitons skills to reinforce the clients' position on the issues at hand.**

Frequent effective communication is fundamental to any successful lobbying strategy. Our lobbying team will work hard to gain an intimate understanding of the specific issues facing the Village in order to effectively communicate and advocate on its behalf. Our strategy to accomplish this goal includes the following steps:

- Initially, our team will conduct issue workshops with key leaders including department leaders to understand the pressing issues as well review the current use of government funded or authorized programs, then work with the Village Council and leadership team to develop legislative priorities and strategies.
- Once the legislative priorities are set we will begin to schedule one on one meetings with key legislators and staff as well as monitoring the legislative schedule for upcoming committee meetings, hearings, etc. We will also monitor legislation filed by others which may impact the Village of Wellington and begin developing an action plan with you to either support or work to defeat such bills. We will do the same monitoring of the Executive Branch proposals and budgets.
- Regular communication with the Village officials and staff to review feedback from legislative priority meetings and to stay abreast of executive and legislative actions having a bearing on the City's fiscal and programmatic interests;
- Review periodically the Village's best use of federal programs, assistance, appropriations, and/or any other legislative, administrative or executive actions.
- Establish (but mostly, maintain) positive working relationships with members of the executive and legislative branches of the local, state and federal government to enhance the Village's position with respect to financial assistance, including reimbursements, applications, regulatory procedures, legislation, budget authorizations and appropriations, and other similar matters as needed.
- Create specific opportunities through events, hearings, visits to reiterate the Village's legislative priorities to targeted audience.
- Maintain a fully functional office in Tallahassee and Washington, DC for Village leaders to use as needed when in town lobbying in order to provide clerical assistance and to ensure adequate coordination between Washington D.C. and the Village.
- Prepare weekly reports advising of the current status of legislation during legislative sessions.

- Advise on a timely basis of any issues, meetings, hearings, or legislative and administrative procedures of relevance to the Village.
- Be available on a twenty-four hour, seven (7) day per week basis at all times and immediately responding to any calls or pages by the Village.
- Maintain liaison with the Village's Congressional and Legislative delegation and assisting the delegation in any matter that the Village determines to be in its best interest.
- Counsel the Village regarding appearances by their personnel before legislative committees and with agencies.
- Identify and notify the Village in advance of opportunities such as grant opportunities and funding availability for transportation, community and economic development, environmental matters, infrastructure improvement, hurricane recovery efforts, housing and urban development, homeless programs, intermodal programs and any other areas of interest to the Village.
- Assist in writing, interpreting and monitoring legislation and regulations.
- Assist in the drafting of legislation, amendments, report language, position papers, and testimony.
- Provide monthly written progress reports detailing the services that have been rendered.
- Being prepared at all times to obtain documentation and research materials upon request.
- Coordinate site visits by local, state and federal officials to enhance the visibility and recognition of Wellington's exemplary projects among the pertinent departments and agencies.
- Establish and maintain liaison services, establish regular interaction, and assist the Village in establishing long-term relationships with appropriate state and national associations (League of Cities et al.)

### *Leadership*

All political decisions are based on understanding, education, and most of all, relationships. Our team is committed to making sure Village officials have access to legislative leaders, such as House and Senate Majority Leaders, Whips, House Speaker and Speaker Designates, and Senate President and President Designates as well as key committee chairs. We are uniquely qualified to promote and advocate for Wellington and its legislative packages to local, state and federal leaders 365 days a year



**4. The ability to respond to regulatory inquiries and testifying at public hearings.**

Through our lobbying efforts for municipalities since 1992, we have handled numerous regulatory inquiries and testified at public hearings on countless occasions. Regulatory inquiries require a quick action and a thorough response. We have assisted our clients with various state and federal regulatory inquiries by using our network of contacts to help identify issues and offer guidance for the most expedient solution to resolving the issues at hand. As an example, the City of Hollywood identified a problem with their ability to implement its Water Re-Use program due to the lack of legislative authority and complicated regulatory process municipalities were facing when attempting to operate such a worthwhile program. The Becker & Poliakoff team stepped in and drafted legislative language to solve the problem and had the bill introduced in the House and Senate. The next step was to build support for its passage by having key members of the Legislature understand the problem and its potential legislative solution. We were instrumental in having the House of Representatives' committee with jurisdiction visit Hollywood's water re-use facility and hear from Town officials about the need for this legislation. Ultimately, the alternative water supply legislation passed the Legislature and has significantly improved the City's ability to implement its reclaimed water program and thus saving thousands of dollars.

We have testified on numerous occasions for clients and are always willing to do so; however, it is also more meaningful to have a City official in the Capitol providing testimony. As an example, when first hired by the City of Cape Coral, one of our strategic initiatives was to elevate the City's profile and presence in Tallahassee during the Session. Prior City lobbyists had not invited Cape Coral officials to Tallahassee, much less secure meetings or opportunities to testify. Our lobbying team got to work and organized a special lobbying mission for the Mayor and Manager in conjunction with Lee County Days. We organized high level meetings for City officials with the Speaker's Chief of Staff, Lt. Governor, Secretaries of the Florida Dept. of Transportation, Community Affairs and many others.

**5. Good Judgement and the Ability to Take Initiative.**

There is no better testament to our ability to use good judgement and to take initiatives than our many long standing (10+ year) client relationships with several local governments. For each of these clients, we have been renewed several times despite differing political circumstances, changing of the guard in municipal leadership and many other complicating factors. Despite it all, the constant at these cities remains the Becker & Poliakoff lobbying team. We have represented the Town of Southwest Ranches since its inception in 2000; the City of Opa Locka since 1999; the City of Hollywood since 1993; the City of Pompano Beach



since 2000. We could go on; however, we take pride in knowing that these long term client relationships are built on our ability to use good judgement, take initiative and ultimately demonstrate our value (return on investment) over and over again.

One dramatic example of taking initiative was when the City of Opa Locka was experiencing financial difficulties, lobbyist Yolanda Cash Jackson convened a meeting in Tallahassee between the Governor, Lieutenant Governor, Inspector General and key officials from the City, to prevent an Oversight Board from being established to monitor the City's economic situation. This was a victory for the City. Elected officials from Opa Locka met with the Governor to discuss opportunities for funding through the Front Porch, economic development program. That was followed by a site visit by members of the Governor's staff to Opa Locka. These meetings combined with some excellent lobbying and staff work yielded hundreds of thousands of dollars in Front Porch funding in areas such as community development, environmental, infrastructure, community policing and technical assistance to help implement new programs in Opa Locka.

**6. The ability to manage high levels of stress and meet critical deadlines.**

Using a true team approach has served the Becker & Poliakoff lobbying team well when it comes to managing high levels of stress and meeting critical deadlines. Juggling dozens of client demands and providing 24/7 client service requires a true team effort. Fortunately, our team of lawyers and lobbyists has worked together for many years. They have excellent working relationships in which they depend on each other to uphold the high level of service that our clients have come to expect. In Tallahassee during the legislative session, for example, you will rarely see one team member without another; and if they are apart, they are in constant communication during the day. They meet every morning and every evening to compare notes and nimbly adjust their lobbying strategy based on the intelligence gathered during the day.

**7. Representative List of Clients and Professional References from last Five Years:**

Local & State Government Lobbying:

Solid Waste Authority of Palm Beach County: *Marc Bruner (561) 640-4000*

Miami-Dade County: *Jess McCarthy (305) 375-5600*

Miami-Dade County Public Schools: *Iraida Mendez (305) 995-1497*

City of Cape Coral: *Terri Hall (239) 574-0446*

City of Hollywood: *Lori Mertens (954) 921-3599*

City of Lauderdale Lakes: *Jonathan Allen (954) 535-2740*

City of Lauderhill (Broward County): *Desorae Giles-Smith (954) 730-3012*

City of Miami Gardens: *Mayor Oliver Gilbert (305) 622-8000*

City of Opa-Locka: *Kevin Baker (305) 953-2821*  
City of Pompano Beach: *Phyllis Korab (954) 786-4601*  
City of West Park: *Ajibola Balogun (954) 989-2699*  
Town of Southwest Ranches: *Mayor Jeff Nelson (954) 448-1579*  
Miami-Dade Expressway Authority: *Javier Rodriguez (305) 637-3277*  
City of Lauderhill Safe Neighborhood Districts; *Desorae Giles-Smith (954) 730-3012*

Special Assessment and Finance:

Solid Waste Authority of Palm Beach County: *Marc Bruner (561) 640-4000*  
City of Hollywood: *Lori Mertens (954) 921-3599*  
City of West Park: *Ajibola Balogun (954) 989-2699*  
City of Cape Coral: *Terri Hall (239) 574-0446*  
City of Pompano Beach: *Phyllis Korab (954) 786-4601*  
Miami Dade County Public Schools: *Iraida Mendez (305) 995-1497*  
Miami Dade County Expressway Authority: *Javier Rodriguez (305) 637-3277*

Federal Issues

Palm Beach County *Todd Bonlarron (561) 355-3451*  
City of Hialeah: *Fred Marinelli, (305) 883-5839*  
City of North Bay Village: *Dennis Kelly (305) 756-7171*  
Miami Lakes: *Alex Rey (305) 364-6100*  
Town of Southwest Ranches: *Mayor Jeff Nelson (954) 343-7472*  
City of Hialeah Gardens: *Willie Rodriguez (305) 558-4114*  
Miccosukee Tribe: *Julio Martinez (305) 318-9459*

**8. Individual qualifications for the proposed lobbying team.**

Our team will be lead by **Neil Schiller**. Mr. Schiller will be your point of contact and will manage the coordination of professionals within the Firm. All members of the proposed lobbying team are properly registered. In addition, Neil will be responsible for any local lobbying as well as any interactions with local elected officials, including Florida legislators and Members of Congress. For Tallahassee, the Village of Wellington will be represented primarily by **Rich Candia** and **Jose Fuentes**. Both Rich and Jose are Tallahassee veterans having represented a number of municipalities both in the past and present. They are intimately involved with the Florida League of Cities legislative agendas and have become accustomed to working with municipalities to advance their own agendas in Tallahassee. In addition to Mr. Candia and Mr. Fuentes, the Tallahassee team will be augmented by **Bernie Friedman**, **Yolanda Cash Jackson**, and **Mario Bailey**. Both Bernie and Yolanda are well-respected lobbyists in their own rights and have mastered the budget process to ensure that any well-placed recurring funding mechanisms are protected from the legislature. In



Washington, D.C., both **Omar Franco** and **Clarence Williams** will work with **Tom Barlow** to represent the Village of Wellington. All three lobbyists currently represent Palm Beach County and are well-versed in the federal legislative process with respect to both policy matters and grant requests. Whether its a local, state or federal issue, Becker & Poliakoff has the right team to represent the Village of Wellington and be successful.

We are proud that our team of lawyer/lobbyists is one of the most diverse lobbying teams in Florida. In political terms, that means we cover all bases, sides of the aisle and ethnic caucuses. As an example, lobbyist **Yolanda Cash Jackson** is one of Tallahassee's leading lobbyists based on her success on behalf of a wide range of clients and issues and is perhaps the best known African American lobbyist in the state of Florida. **Bernie Friedman** has been a fixture in South Florida politics for the last thirty years and has been lobbying in Tallahassee since 1991 for several long time clients including the Florida Association of Jewish Federations which provides him excellent access to Jewish legislators, both Democrats and Republicans, around the state. **Jose Fuentes** has 25+ years of legislative experience in Tallahassee and South Florida. In addition to serving in the House Speaker's office, Jose served as Director of Hispanic Affairs for the Cuban American legislators from Miami Dade County and is active in Asian-American organizations. **Rich Candia** was a legislative staffer who has represented high profile local institutions, University of Miami and Florida International University at the local, state and federal levels. He has been a leader on Hispanic outreach within the Republican Party. Our Tallahassee team is rounded out by **Mario Bailey**, a former Tallahassee staffer who is essential to the team's success. In Washington, DC, **Omar Franco** and **Clarence Williams** are two former Chiefs of Staff to South Florida Congressmen. As a Republican and a Democrat, they more than adequately cover both political parties, and are very well known by all of the members of the Florida Delegation. Omar was recently elected as President of the National Hispanic Lobbyists Association.

Locally, **Neil Schiller** has been recognized as a Super Lobbyist by the *Sun Sentinel* for his work in Broward and Palm Beach Counties. Neil specializes in representing clients before local governments. He has represented large organizations like Oracle, Florida Power and Light, the Baltimore Orioles, T-Mobile, and the Solid Waste Authority as well as small clients like Keith and Associates, Harvey Covington and Thomas and Saltz Michelson Architects on a variety of issues ranging from policy matters to purchasing decisions. In addition to being a lawyer, Neil is a recovering political consultant, having worked with many elected officials on various aspects of their campaigns. He is also active in the community serving on a wide range of boards including the FAU Foundation Board of Directors, Palm Beach County Business Development Board, and the Jewish Federation of South Plan Beach County.



### **Local Lobbying and Team Leader**



**Neil Schiller** is an attorney and lobbyist in the Firm's Government Law & Lobbying Practice Group. He helps clients promote and advance their objectives before governmental entities at the local, regional, and state levels of government. Having worked with many elected officials on political and other grass roots campaigns, he has a vast working knowledge of the local, regional and Florida political landscape and insider's understanding of local governmental decision making. Neil has run many successful political campaigns at all levels of government in Broward, Palm Beach, Martin, and St. Lucie Counties and has extensive contacts with local civic activists and political leaders. He is known for his work ethic, strategic thinking, and creative messaging for business clients seeking governmental approvals as well as candidates and non profit organizations needing an effective communications plan and political strategy.

Neil has represented a wide variety of clients before their respective County and City Commissions ranging from corporate clients such as T-Mobile, Inc., and the Oracle Corporation to non profit corporations such as Norton Park Place Condominium Association and the Las Olas Beach Club Condominium Association. Representation has included land use, zoning, development related issues and/or procurement of government contracts.

As a land use/development attorney, Neil has successfully guided developers through the multifaceted approval process with issues such as site-plan approvals, rezonings, variances and special exceptions to name a few. He has also represented many of the firm's condominium and homeowners association clients to oppose new neighboring developments or mitigate their impacts on the association. In government procurement, Neil has successfully navigated county and local procurement processes on behalf of multi-national corporations to small, local businesses to secure multimillion dollar contracts.

Prior to joining Becker & Poliakoff, P.A., he ran his own political consulting and lobbying practice, Political Action Communications, LLC, where he scored a "trifecta" in winning three tough state house races in August of 2006. Previously, Neil lobbied and practiced law at Poole McKinley, & Blosser, where he worked closely with clients to provide legal analysis, advocacy, and political strategy at the local and state governmental level. Additionally, Neil worked as the Director of Government Affairs for the REALTOR® Association of Greater Fort Lauderdale representing over seven thousand members to various municipalities, Broward County, the Florida Legislature and the United States Congress.



## State Lobbying Team



**Bernie Friedman** is the shareholder in charge of the Firm's Government Law and Lobbying Practice Group. He represents a wide variety of businesses, non-profit organizations, developers, and trade associations before local governments in South Florida, the Florida Legislature and Executive Agencies in Tallahassee. He has helped public and private sector clients secure millions of dollars in government grants, procurements, concessions and contracts. An experienced lawyer-lobbyist, he provides strategic advice and guides clients through the complex governmental procurement process, including responding to Requests for Proposals (RFP) from the early stages of team building through project submittals and presentations to final selection and negotiation.

Recognized by the Sun-Sentinel as one of the area's most influential lawyer-lobbyists, his 30+ years of political experience, knowledge of the government, and access to key decision makers are extremely valuable to his clients. An active and visible political figure, Mr. Friedman has addressed the Democratic National Convention, testified before U.S. Congress, and appeared on programs including "Good Morning America", "The O'Reilly Factor" and "Larry King." Prior to practicing law in Florida, he spent ten years working on Capitol Hill as Chief-of-Staff to a U.S. Congressman



**Yolanda Cash Jackson** is an attorney and one of the Firm's primary state and local government lobbyists and a shareholder with the Firm. She is well known among the Tallahassee lobbying corps for her representation of several south Florida governmental agencies including municipalities, special districts and school boards, and her relationships with legislative leaders from around the State. She has held numerous appointed positions at the State level including serving on the Board of Directors of the Florida Residential Property and Casualty Joint Underwriting Association (JUA) and as Chair of the Florida Hurricane Catastrophe Fund established in the aftermath of Hurricane Andrew. She was selected to become a member of the prestigious Leadership Florida organization and currently sits on their statewide alumni Board, a very high level group of business people and policy makers.

Ms. Jackson has extensive and significant lobbying experience in areas that are important to the SWA including funding for infrastructure improvements, utilities, wastewater treatment, storm water drainage, and industrial waste clean up through her representation of several



cities including Miami Gardens, Opa Locka, Lauderdale Lakes and Pompano Beach as well as Miami Dade County School Board, Metro-Miami Action Plan, Miami Dade Expressway Authority, plus others such as Florida Memorial University, Bethune Cookman College, AT&T, Service Employees International Union, Health Choice Network. In addition to her strong legislative lobbying experience, she has handled issues at the Executive level and has experience interacting with the Public Service Commission which may be an asset to the SWA. Ms. Jackson is proud that each of these clients has renewed her lobbying contract which is a strong indication of their satisfaction with her skills, knowledge and most of all, results. She has been honored and recognized by various organizations including her client Florida Memorial University for her outstanding contributions to the university's success; In Focus Magazine as one of South Florida's Most Outstanding Black Professionals; and most recently by the South Florida Business Journal as one of their "Key Partners". She served as General Counsel to the NAACP (Miami-Dade Branch) where she is also a member of the Executive Committee. She is very active in professional organizations at local, state and national level including the National Bar Association, The Virgil Hawkins Chapter and The Wilkie D. Ferguson Chapters; National Bar Association/Women's Law Division, Distinguished Speaker Coordinator; Black Lawyers Association and Dade County Bar Association.



**Jose Keichi Fuentes** is a native Floridian with a strong network of contacts and over 25 years of experience working in the government and political arenas. He is a government relations professional who represents local municipalities, other public bodies and private sector clients in environmental, infrastructure and water resources at the federal, state and local levels.

Mr. Fuentes is a Government Relations Consultant in the firm's Government Law & Lobbying Group. He previously served as Managing Partner of The Fuentes & Rodriguez Consulting Group. He is well-known in political circles as a leading provider of strategic lobbying, and business development solutions in Florida. Among others, his client list includes the cities of Homestead, Miami Lakes and Miami Springs as well as All Aboard Florida, VE Restaurant Group, and AMEC Engineering. His extensive lobbying experience at the highest level of local and state legislature in Miami-Dade County and Tallahassee has helped him pass the Florida Everglades Act, Florida Brownfields Act and Green Utilities Act. He has also secured funding for children through the CINs/FINs, and for the municipalities he represents through the allocation of major infrastructure projects.

In the past, Mr. Fuentes served as Director of Hispanic Affairs for the Cuban American Legislators from Miami-Dade County, Legislative Aide for Rep. Rudy Garcia, Director of the



Office of the Speaker of the Florida House, Assistant to U.S. Senator Connie Mack, Government Liaison to the Board of County Commissioners, and Regional Director of Miami-Dade County's South Florida Water Management District.

Mr. Fuentes is committed to public service as proven through his community, civic and volunteer work. Most recently, he was appointed by Governor Rick Scott to the Board of Trustees of Miami-Dade College, the largest and most diverse college in the nation. He was also asked to serve as Chairman of the Governmental Affairs Committee of the Greater Miami Chamber of Commerce where he has played a key role in engaging the Chamber to support the High Speed Rail construction program.

Currently, Mr. Fuentes is a board member of the City of Miami Waterfront Advisory Board, City Year Miami and St. Thomas University. He is a member of the Mayor's International Council and serves on the Executive Committee of the Miami-Dade County Republican Party. Mr. Fuentes is past Chairman of both United Home Care Services and the Miami-Dade County Asian American Advisory Board.

He has been very involved in activities enhancing the relationship between Japan and Miami. He has served as Chair of the Kagoshima Sister Cities Committee and has been invited by the Japanese Ministry of Foreign Affairs to participate as a member of the Japanese American Leadership Delegation. Mr. Fuentes has been fortunate to be a guest of both Governor Jeb Bush and President George Bush in similar related activities.

Mr. Fuentes has been honored by the Diabetes Association with the "Valor Award" for community service, and the South Florida Hispanic Chamber of Commerce with the "Annual Sunshine Award" as Public Official of the Year. He is included in Who's Who of Asian Americans and has been featured in numerous occasions in The Miami Herald for his devotion to community service and for his pride in his Cuban/Japanese Heritage. He was a finalist of the Price Waterhouse Up & Comers Award. He is a graduate of St. Thomas University.



**Richard Candia** is a seasoned government consultant in the Firm's Government Law & Lobbying Practice Group. He has more than 20 years of experience working on city, state, and federal government issues on behalf of his clients. Prior to joining the firm, he was a partner with the Fuentes Rodriguez Consulting Group, LLC (FRCG).

Richard is well known among political leaders in Tallahassee and in South Florida due in large part to his high profile representation of two of South



Florida's most prestigious institutions, Florida International University and the University of Miami before local and community decision makers, the Florida Legislature and Executive branch as well as in Washington. His legislative successes for these clients include: passing legislation establishing the College of Law at FIU; the initial pursuit of sovereign immunity for the UM medical school; and securing increased funding each year for both institutions.

A lifelong Republican with ties to many of the state's most influential party leaders, Richard has been successful working with the Republican majority in the State House and Senate due to his knowledge of the appropriations process from his days serving as chief of staff to then State Senator and current Congressman Mario Diaz Balart. This experience and background has also been helpful to his clients seeking work with local and state governmental agencies. Most importantly, Richard assists clients in building lasting relationships with key decision makers, and helps clients identify solutions and opportunities to meet their individual needs.

#### **Activities & Memberships**

Since 1992, he has been working closely with elected officials including Congressman Diaz Balart and other community and state Republican leaders. In 2004 and 2008 Richard was asked to serve on the Republican Party of Florida Hispanic Outreach Committee and has worked closely with the Miami-Dade Republican Party to assist it in its effort to more effectively reach Hispanic voters.

#### **Education**

- Florida International University, M.B.A., 2003
- Florida State University, B.A., 1988



**Mario Bailey** is a lobbyist in the Firm's Government Law & Lobbying Practice Group. He concentrates on government relations and lobbying in South Florida and Tallahassee. Mr. Bailey works closely with clients from various sectors including business, municipal government and education to advocate for their issues before various government agencies and the state legislature. He assists in advancing his client's political and legislative interests and monitoring legislative and regulatory issues that impact their various industries.

Prior to joining Becker & Poliakoff, P.A., Mr. Bailey served as the Chief Legislative Aide to Florida State Representative Dwight M. Bullard. This experience taught him the intricacies of the legislative process, committee procedures, and helped him build strong ties to members of both parties and chambers. Mr. Bailey began his political career as a field coordinator on a congressional campaign in South Florida. Since then, he has been active



in various civic and business organizations locally. He's an alumnus of the Greater Miami Chamber of Commerce's Leadership Miami Program.

In college, he served as rules committee chairman of the Student Government Association's Senate, Vice-President of the Residence Hall Association, the Southern Province Vice-Polemarch of Kappa Alpha Psi, Fraternity, Inc. and a member of the Student Leaders Council. He also served as an intern to former U.S. Congressman Artur G. Davis of Alabama



**Keith Poliakoff** is a local government attorney with the Firm's Government Law Group. He has served as Attorney to the Town of Southwest Ranches since its incorporation and has been instrumental in the Town's growth and success. He has worked on virtually all matters affecting local government including the a solid waste assessment system which is billed in conjunction with residents ad valorem taxes, franchise agreements with waste haulers, and created rules and regulations addressing bulk pick up and emergency clean up procedures. In the aftermath of the recent hurricanes, he helped secure state and private financing to pay for debris collection, removal and processing for the Town.

He has substantial knowledge and experience in issues unique to Florida governmental entities including issues such as Annexation, Municipal Liability, RLUIPA, Bert Harris Act, Conflict Resolution, the Public Records Act, Government in Sunshine and laws pertaining to ethics and elections. He has presided over countless meetings and quasi-judicial matters. He also works closely with other local public officials and provides guidance to his many business clients on the complex governmental processes including public sector procurements, affordable housing, developer agreements, and legislative initiatives. He also has considerable experience with Community Redevelopment Agencies and has been involved in numerous redevelopment efforts throughout Broward County. In 2005, Mr. Poliakoff was appointed to the Broward County Land Preservation Board by the Broward County Commission. This Board is responsible for reviewing all land acquisitions in Broward County, specifically overseeing the \$400 million bond issue which was approved to preserve and reclaim over 1,400 acres of open space in Broward County.

## Federal Team



**Omar Franco** is a federal government lobbyist in the firm's Government Law & Lobbying Practice and is the Managing Director of the Washington D.C. office. Omar serves on the Board of Directors for the American League of Lobbyists (ALL) where he completed the ALL's Lobbying Certificate Program (LCP). Omar's client base includes Intuit, Algenol Biofuels, Safrema Energy, Dade Medical College, University of Southernmost Florida, Gold Coast Florida Regional Center, Hi-G-Tek, Realauction.com, Palm Beach County, FL and the Town of Southwest Ranches, FL, among others.

Omar began federal lobbying in 1999 when he became Director of Governmental Relations for the University of Miami's School of Medicine. In 2001, University of Miami President Donna Shalala promoted him to Assistant Vice President of Governmental Relations where he represented the university at both the federal and state levels of government and primarily worked on appropriations and health care issues.

In 2003, Omar was named Chief of Staff for Congressman Mario Diaz-Balart (R-FL). Omar held this position for over four years, managing the Congressman's Washington D.C. and district operations and closely counseling the Congressman in his areas of expertise which include federal appropriations, health care, transportation, higher education and issues dealing with Hispanics and the state of Florida. During his tenure, Omar assisted in founding the Congressional Hispanic Conference and the Congressional Hispanic Leadership Institute.

In 2007, Omar joined Petrizzo Strategic Group where he was the lead government relations consultant for the Miccosukee Tribe of Florida, Stratus Pharmaceuticals, Pacer Health, FalconTrust Air, Florida Gulf Coast University, Secure Wrap, Medica HealthCare Plans, and the municipalities of Hialeah, Miami Lakes and North Bay Village. He also worked on federal issues for CNL Financial Group, Vulcan, Inc., Charter Communications and Frontier Communications, among others.

Omar founded Franco Government Relations in 2010 where he represented the Miccosukee Tribe of Florida, Florida Gulf Coast University, and the Town of Miami Lakes and continues representing the municipalities of Hialeah, North Bay Village and Hialeah Gardens.

Omar began his government service in 1993 as the District Legislative Assistant for Florida State Representatives Art Simon (Democrat) and Annie Betancourt (Democrat) and then



Florida State Senator Mario Diaz-Balart (Republican). He also worked as a Field Office Director for the Florida Medical Association before joining the University of Miami.

Active in Hispanic political organizations, Omar serves as the President of the Hispanic Lobbyist Association (HLA) after having served on the Board of Directors for five years.



**Clarence Williams** is a lobbyist in the Firm's Government Law & Lobbying Practice Group in Washington, D.C. A former Chief of Staff for Congressman Kendrick B. Meek of Florida, he served as the Congressman's chief policy advisor and strategist on all issues before the U.S. House of Representatives. He directly managed the Congressman's portfolio of issues relating to the Committees on Ways and Means, Armed Services, Homeland Security, and Budget.

On Capitol Hill, Clarence specialized in issues involving health care, armed services, taxation, alternative energy, local government issues, and domestic and international trade. He is uniquely qualified in issues relating to health care reform, having logged well over 100 hours in briefings, consultation, and collaboration on legislative language with Ways and Means and House leadership staff on the Patient Protection and Affordable Care Act. Additionally, he was actively involved in the passage of several pieces of tax policy, including a delay of a 3% tax withholding requirement for most procurement by local governments. Clarence holds a "Top Secret" security clearance and has extensive experience working with the Department of Defense on issues ranging from policy and procurement to logistical planning in the aftermath of various natural disasters including Haiti.

As primary liaison for Mr. Meek to appropriations staff, Clarence shepherded nearly \$53 million directly to South Florida local governments, nearly \$20 million to educational entities, and over \$13 million to South Florida hospitals and community centers. As well, he negotiated with Health and Human Services (HHS) Secretary Kathleen Sebelius to advance payments totaling \$12 million to Jackson Health Systems to help avoid shut down of this important institution.

Clarence also has extensive state government experience in Tallahassee working in the Florida Legislature. He served as a senior policy advisor to Florida Senate Minority Leaders Ken Jenne, John H "Buddy" Dyer, and Tom Rossin, for whom he served as the primary policy writer and strategist on issues relating K-12 education, commerce, tax, and local government. He secured numerous legislative victories despite operating in the minority,

including passage of Class Size Reduction, 2000 comprehensive school safety legislation, and the 1997 school construction legislation which generated nearly \$2 billion for Florida public schools.



**Tom Barlow**, founder and President of Barlow Consulting, is a seasoned political consultant and lobbyist with an in-depth understanding of the workings of government at the local, state and federal level. His extensive experience includes advocacy in environmental, tax, energy, transportation, health care, telecommunications, and general business issues. His keen understanding of the business community coupled with an extensive knowledge of the workings of government is a conduit for creative solutions. When Clients retain his services, Tom becomes a true partner helping organizations succeed.

Mr. Barlow lobbied for Florida Power & Light (1981-2002), MCI, Inc. (2003-2005), and Florida Atlantic University (2005-2009). He was a loaned executive to Edison Electric Institute in Washington, D.C. Tom served as an executive in large public and private institutions, and routinely advised senior officials regarding the impact of proposed legislation. He also managed other lobbyists when a team building effort was required. Tom graduated with a Bachelor of Science in Environmental Engineering from Western Kentucky University and received a Master of Science in Environmental Engineering from Vanderbilt University.

## **9. Proposed Rate Structure**

The Becker & Poliakoff lobbying team proposes to provide State, Local and Federal Lobbying services as described above for the Village of Wellington for an annual flat fee of \$85,000.

In conclusion, thank you for this opportunity to proffer this proposal. We look forward to the opportunity to serve the Village of Wellington and create a long-term, mutually beneficial working relationship between our two organizations.

**RAMBA CONSULTING GROUP, LLC- ERIN DEADY, P.A.**



March 6, 2013

Ed De La Vega  
Purchasing Department  
Village of Wellington  
12300 Forest Hill Boulevard  
Wellington, Florida 33414

*Re: Letter of Interest for State, Local and Federal Lobbying Services*

Dear Mr. De La Vega:

Please accept this correspondence and supporting documentation as a response to the Village's Letter of Interest for State, Local and Federal lobbying services. Our Team has worked to combine the expertise of specific individuals to assure the requisite experience to fulfill the scope of services the Village is seeking. Erin L. Deady, P.A. in coordination with Ramba Consulting Group, LLC and High Ground Strategies provides significant depth of experience with a physical presence in Palm Beach County, Tallahassee and Washington D.C. We are simultaneously accessible to the Village and in the centers of activity where the Village can leverage the greatest influence to achieve specific legislative outcomes based on a set of priorities.

Our Team has a strong background in the development legislative strategy, particularly that of grant strategy, appropriations at the federal and state levels for projects, programs and initiatives and the monitoring and tracking of federal and state legislation and priority regulations. The Team has worked with key local, state and federal agency, association and legislative entities including relevant elected decision-makers, staff, committees, appointed officials, stakeholder groups and industry associations.

As requested, in Section A, the Team will provide qualifications and references demonstrating:

- (1) knowledge about the legislative process at the State, local and Federal level
- (2) previous public relations/lobbying experience and a network of contacts with policymakers
- (3) strong communication skills to reinforce the clients' position on the issues at hand
- (4) the ability respond to regulatory inquiries and testifying at public hearings
- (5) good judgment and the ability to take initiative
- (6) the ability to manage high levels of stress and meet critical deadlines

Section B provides a list of clients during the past five years/list of professional references. Section C provides a work breakdown structure and budget. Section D provides licenses and registrations.

We appreciate the opportunity to provide a Letter of Interest for this scope of services. For any additional information requested, please do not hesitate to contact me.

For the Team

ERIN L. DEADY, P.A. 

1111 Hypoluxo Road,

Suite 207

Lantana, FL 33462



## **Section A: Team Qualifications and Experience**

For ease of review, the Team provides the following regarding its qualifications and experience consistent with the Village's Scope of Services.

### ***(1) Knowledge about the legislative process at the State, local and Federal level***

#### **Erin L. Deady, P.A.: Palm Beach County**

With over 16 years of public policy, legislative and legal experience, Erin L. Deady, P.A. is a full service legal and consulting firm based in Palm Beach County, FL. In particular, Ms. Deady has worked on public finance, special district, land development, environmental and energy issues within Palm Beach County since 1996, beginning her career as a Planning Researcher with the Village of Wellington assisting in drafting its first Comprehensive Plan.

From 1996 to 2003, Erin Deady served as a Policy Analyst, and later, Environmental Counsel for Audubon of Florida located in Miami, FL. She was responsible for all local government land use, regulatory, growth management, water resource policy and regulation and environmental restoration goals of the organization in the Lower East Coast of Florida. She worked with the organization on various state and federal legislative and policy initiatives as they pertained to the authorization of the Comprehensive Everglades Restoration Plan in the Water Resources Development Act of 2000 and subsequent Federal Programmatic Regulations. She was also the organization's lead advocate before the South Florida Water Management District Governing Board and coordinated the organizations positions before the U.S. Army Corps of Engineers. In that position, Ms. Deady also participated in water quality litigation and regulatory initiatives. Ms. Deady also participated in numerous state and federal rulemaking proceedings involving environmental resource, consumptive use and wetlands permitting.

Subsequent to her position at Audubon of Florida (2003-2011), Ms. Deady joined Lewis, Longman & Walker, P.A. where she represented agricultural landowners, local governments (including Miami-Dade and Lee counties), private land developers and a Native American Tribe on environmental, water resource and regulatory issues and cases. In particular, Ms. Deady represented Miami-Dade and Lee Counties before the South Florida Water Management District and U.S. Army Corps of Engineers regarding Lake Okeechobee regulatory and Everglades restoration issues. Ms. Deady also worked on complex wetlands restoration projects, appeals regarding U.S. Army Corps of Engineers permits, development project approvals and challenges, consumptive use and environmental permit litigation and numerous legislative issues for clients at the state and federal levels. Ms. Deady has drafted legislation related to energy financing, special districts, growth management, Caloosahatchee and Lake Okeechobee restoration and worked on numerous growth, energy and environmental regulatory matters.

In 2011, Ms. Deady launched Erin L. Deady, P.A., a full service legal and consulting practice, representing largely public sector clients before federal and state agencies. Developing a significant grant practice and securing almost \$6 Million for agricultural, port and local government clients from the Florida Panhandle to the Florida Keys, Ms. Deady has developed a statewide reputation on strategizing and securing grant funding for client programs and projects. Ms. Deady is currently engaged by public sector clients to develop grant strategies and priorities. In this full service practice, Ms. Deady has completed numerous planning initiatives serving as both prime and sub-contractor, managing numerous contractors, meeting deadlines with specific project deliverables. The firm is also certified by the U.S. Small Business Administration as a woman-owned business and has secured all contracting requirements with the federal government.



Ramba Consulting, LLC: Tallahassee, FL

David E. Ramba is founder of Ramba Consulting Group. Prior to creating this entity in August of 2009, Mr. Ramba was head of the Legislative Team for Lewis, Longman & Walker, P.A., for 10 years. As such, Mr. Ramba represented over 30 clients before the Legislature, Governor, Cabinet and state agencies. Ramba Consulting Group is also joined by non-attorney lobbyists and the firm provides full-service legislative representation. Prior to working with Lewis, Longman & Walker, P.A., Mr. Ramba was Legislative Counsel for The Florida League of Cities, Inc. Mr. Ramba was responsible for the drafting of proposed legislation for all legislative matters affecting municipalities and for advocating the League's position to the Florida Legislature, Constitution Revision Commission, Cabinet and other government agencies. He also participated in rule development with state agencies, drafted legislative policy for League members and served as legal counsel to city attorneys.

Mr. Ramba also worked as an attorney for the Department of Labor's Special Disability Trust Fund and in the Florida House of Representatives Committee on Finance and Taxation.

High Ground Strategies, Washington D.C.

Tom Adams is the President of High Ground Strategies, a public affairs firm specializing in government relations, strategic services, issue analysis, partnership development, and identifying and securing project and program funding. The firm focuses on the needs of non-profit, trade association, foundation, local government, and sustainable-minded businesses clients seeking to successfully navigate the governmental decision-making process.

High Ground Strategies positions its clients to achieve their goals in a time-effective manner by finding policy solutions that marginalizes the opposition and reduces the likelihood of costly litigation on the back end. Its guiding principle is to help clients better understand the federal public policy arena and how they can influence it so that they can sustain their effort whether or not they have the resources to maintain a Washington presence. The first step in that process is to help our clients identify their priority public affairs needs by developing a policy agenda or fine-tuning the agenda they've already developed.

Mr. Adams has more than 25 years of public affairs, government relations and fundraising experience. He has worked for two Members of Congress, non-profit organizations and a trade association. He has extensive policy and political experience in Florida through his service to the late Rep. Dante Fascell (FL) and his tenure at National Audubon Society. Raised in Miami, he now lives in Bethesda, MD.

***(2) Previous public relations/lobbying experience and a network of contacts with policymakers***

Ms. Deady has significant background and experience in communicating client, organization priorities and objectives before numerous types of decision-making bodies and elected officials. With almost all client representation including public or private representation, a majority of the issues have required substantial public relations skills to build coalitions and support for client positions including the involvement of other governmental entities, stakeholders and not-for-profit organizations. The firm represents local government clients before state and federal agencies and works on federal rulemaking regarding energy finance issues. Ms. Deady maintains strong relationships with key Palm Beach County elected officials and staff as well as key agency contacts at the state and federal levels. Ms. Deady has also served on the Board of local water control district, run a local referendum campaign in Palm Beach County and has significant relationships with elected officials and municipal staff throughout Palm Beach County as well as the state level.



Since 2009, Ramba Consulting Group, LLC, has been located in downtown Tallahassee. The firm is focused on quality legislative representation to numerous clients, including independent special districts and other local governments, before the Florida Legislative and Executive Branch. Mr. Ramba has unparalleled access to members of the Florida House and Senate when it comes to client issues that are raised during the legislative session, and he is often engaged as a key negotiator on behalf of clients during pivotal times of the 60 day Session. In playing that role, there is a solid commitment to the clients to maintain a full-time presence in Tallahassee and to be present at the Capitol every day of the 60 day Legislative Session. In much of his work with clients, Mr. Ramba has navigated local legislation through the delegation hearing process, and ultimately passage, by the Florida Legislature.

Mr. Adams has an extensive network of contacts in Washington, DC at the agency and elected official levels and is skilled at developing and maintaining new contacts as necessary. He has been involved in dozens of successful legislative campaigns, including landmark legislation such as the Water Resources Development Act of 2000 that included the Comprehensive Everglades Restoration Act, the California Desert Protection Act, and the 70-title Omnibus Parks and Public Lands Act of 1996. Each of these measures were significant pieces of legislation and were the last bills that passed by their respective Congresses before they adjourned *sine die*. Mr. Adams has also successfully lobbied for more than \$700 million in Everglades restoration budgets and millions of dollars in other programmatic funding through competitive federal grants and congressionally directed spending. The list includes, but is not limited to: a \$3.2 million in a federal highway bill; \$275,000 for the Sarasota Dolphin Research Program; almost \$800,000 for Audubon education programs and education centers; and, tripling Chicago Zoological Society's awards from federal competitive grants.

### ***(3) Strong communication skills to reinforce the clients' position on the issues at hand***

It is critical that legislative strategy and communications are effective. All Team members have strong skills in providing information, analysis, communications and opinions to legislators and government leaders to allow for informed and balanced decision making. The Team is seasoned at the legislative process, working effectively by providing lawmakers with reliable data and accurate assessments of a bill's effect on a client's interests. The Team is strong in the area of research and analysis of legislation or regulatory proposals and communicating the impacts of those proposals on a client's position.

Team members all have experience in strong communications skills as demonstrated by the following highlights:

- Development of communications strategies to achieve specified outcomes including personal communications from key constituents
- Targeting personal communications
- Drafting legislative proposals and securing sponsors for key pieces of legislation
- Presentations on legislative proposals and issues for clients
- Researching, analyzing and developing policy and position statements including targeted fact sheets and data summaries
- Achieving strong relationships with members of the press as well as relevant staff and committee members
- Building coalitions, stakeholder support and implementing grassroots campaigns
- Effective use of legislative alerts, blogs, social media, developing web and media campaigns, and building support for, or opposition to, legislative proposals

- Keeping clients regularly informed of key milestones, votes and decision points
- Writing successful grant strategies and applications, including meeting follow up reporting and monitoring requirements

#### ***(4) The ability respond to regulatory inquiries and testifying at public hearings***

A majority of the issues the Team has represented clients upon have involved some level of regulatory skill and experience including technical environmental, energy, water resource, agriculture, utilities, taxation, franchise issues, employment matters, housing issues, American's with Disability Act, land use and permitting, civil justice reform, transportation, building codes, workers' compensation, health insurance, eminent domain contract negotiations and appropriations matters for state and local programs and administrative rulemaking before local governments, state and federal agencies and legislators. In particular, the Team frequently represents clients on complex land use and environmental regulatory matters including wetlands, energy, power plant siting and environmental resource permitting at the federal and state levels.

Currently, Ms. Deady also represents clients in numerous National Environmental Policy Act ("NEPA") processes involving federal projects and has worked on Clean Water Act permitting issues. Ms. Deady currently represents local government clients in federal rulemaking by the Federal Housing Finance Agency regarding mortgages and local government assessments as well as litigation regarding similar matters. Ms. Deady has also developed and implemented regulatory strategy on several complex permitting projects including a limerock mine in Southern Miami-Dade County, federal restoration projects and private development proposals.

Mr. Adams has extensive experience with federal regulatory process from promulgation to implementation, including the "Everglades Restudy" and many other rule making process in multiple departments such as the U.S. Department of the Interior, U.S. Environmental Protection Agency and the U.S. Army Corps of Engineers. As a Senior Legislative Aide to Rep. Fascell Mr. Adams staffed the Congressman on successful efforts to enact numerous bills and amendments including, but not limited to, the Florida Keys National Marine Sanctuary Act; Coastal Barrier Protection Act Amendments; Hurricane Andrew Supplemental Appropriations bill; and the annual congressional appropriations moratoria on offshore oil and gas drilling in Florida.

Teams members have significant experience in testifying before the Governor and Cabinet, legislative committees, agency boards, local governments, congressional committees, federal and state agencies. Team members have also drafted testimony for clients and stakeholders to advocate positions before similar bodies.

#### ***(5) Good judgment and the ability to take initiative***

Team members have developed strong reputations in the industry based on navigating complicated political issues and policy initiatives. All Team members are accomplished working previously for large national organizations or firms as well as successfully launching smaller practices. Knowledge of how local governments work is a key asset the Team has as well as the local budgetary process and the prioritization on creative project finance including securing grants. The Team also is skilled at proactively creating and implementing strategies and messages that allow a local government's policy needs be incorporated into State and Federal legislation. Team members have created new successful practice areas and have lobbied on extremely diverse issues. The Team considers a primary role of client representation as identifying

needs, problem-solving, and including securing policy changes and/or funds and appropriations for projects that meet their critical needs.

***(6) The ability to manage high levels of stress and meet critical deadlines***

Collectively, the Team has worked in federal and state litigation matters, numerous years before the Florida Legislature and as a Senior Legislative Aide for a Florida Congressman with major chairmanship roles and federal lobbyist for over 20 years. The Team has a demonstrated record of success operating in legislative and regulatory environments with numerous deadlines and time-certain adjournment dates. As such, it routinely operates in a stressful work environment managing resources, including financial and staff, and reporting requirements to accomplish all client goals in a timely manner. The Team is keenly aware of state and federal budgetary and appropriations processes, regularly monitors numerous grant opportunities and legislative timelines of the Florida Legislature and Congress.



**Section B: Clients during the past five years/list of professional references**

## 1. Erin L. Deady, P.A.:

- Town of Lantana, FL (Reference: David Thatcher, Development Services Director)
- Monroe County, FL (Reference: Roman Gastesi, County Manager)
- Leon County, FL (Reference: Herb Thiele, Esq., County Attorney)
- City of West Palm Beach, FL (Reference: Penni Redford, Director of Sustainability)
- City of Boynton Beach, FL (Reference: Carisse LeJeune, Assistant City Manager)
- City of Marathon, FL (Reference: Susie Thomas, former Director of Community Services)
- City of Lake Worth, FL (Reference: Michael Bornstein, City Manager)
- Lee County, FL (Reference: Kurt Harclerode)
- City of Ft. Lauderdale, FL (Reference: Albert Carbon, Director of Public Works)
- Audubon of Florida (Reference: Eric Draper)
- Atlantic Civil, Inc. (Reference: Steve Torcise)

## 2. David Ramba:

- City of Daytona Beach (2005-Present), (Reference: Jim Chisholm, City Manager (386) 671-8000)
- City of South Daytona (2005-Present), (Reference: Joe Yarbrough, City Manager (386) 322-3010)
- Florida League of Cities (1995-1999), (Reference: Chip Morrison, General Counsel (850) 222-5702)
- Florida Association of Special Districts (2000-2009), (Reference: Jim Angle, Palm Harbor FCD (727) 639-4399)
- Indian Trail Improvement District (2001-2002, 2011-Present), (Reference: Tanya Quickel, Director (561) 793-0874)
- Pinellas Park Water Management District (2001, 2006-Present), (Reference: Jan Rogers, Director (727) 528-8022)

## 3. Tom Adams:

- National Audubon Society, (Reference: Mike Daulton, Vice President of Government Affairs, Washington D.C.)
- Chicago Zoological Society/Brookfield Zoo (References: Stuart Strahl, Ph.D.; President and CEO and/or Sarah Breen-Bartecki; Vice President of Conservation Funding Initiatives)
- Ocean Doctor (Reference: David Guggenheim, Ph.D.; President)
- The Ocean Foundation (Reference: Mark Spalding; President)
- SOS Rhino (Reference: Nan Schaefer; Trustee)
- National Youth Recovery Foundation (Reference: Cathie Hartnett; Executive Director)

- American Alliance of Museums (Reference: Gail Ravnitzky Silberglied; Senior Director of Government Relations and Advocacy)

## **Section C: Work Breakdown Structure and Budget**

### **Deliverables:**

1. To focus and prioritize our effort, after receiving input from the staff and Council the Team will develop a legislative agenda, legislative strategy and background information designed position the Village for success.
2. At a minimum, Team members will attend Council meetings every other month to provide regular updates, but the Team will provide a regular monthly written progress report to the Manager or designated staff outlining activities performed and recommendations for future activities or events. The Team will make other presentations to stakeholder groups as requested on a case by case basis.
3. The Team will represent the Village's interests in forums commensurate with the priorities established in the legislative strategy. The Team will also recommend project funding options to maximize and leverage the Village's budget resources. The Team will focus on advocating Village positions before U.S. Congress, the Florida Legislature and, its committees and agencies, Florida's Governor and agencies as well as other public or private organizations (not-for-profit or private) as well as oppose harmful measures and procedures.
4. The Team will communicate priorities, strategies and compile data to assist in advancing the Village's efforts in advancing its legislative strategy. The Team will notify the Village at the earliest possible time of pending issues that may require action that could or will adversely impact the Village and its established legislative priorities.
5. The Team will assist in establishing meetings with members of Congress, members of the Florida legislature, staff or agencies and various organization (not-for-profit or private) members to facilitate information exchange or solicit their aid and advice on matters impacting the Village and its established legislative priorities.





\*\* Estimated May 2013 Project Launch date, with Legislative priorities relating to remaining 2013 Congressional Sessions and 2014 Florida Legislative Sessions

Task	Lead	QTY	Item Cost	Total Cost
<b>1.0 Establish Legislative Priorities</b>				\$20,000
Task 1.1 Internal Staff Briefing	All	1		
Develop initial outline of priorities	All	1		
1 Internal Staff briefing to refine	All	1		
Revisions to outline	ELD	1		
Presentation of initial priorities to Council	All	1		
Task 1.2 Revisions to outline	ELD	1		
Finalize legislative strategy with Staff	All	1		
Council adoption	All	1		
Revisit Florida-specific priorities for 2014				
<b>2.0: Reporting and Updates</b>				\$12,000
Task 2.1: Monthly Reports to Manager	All	6		
Task 2.2 In-person presentations	ELD	4		
Task 2.3 Updates to legislative agenda for 2014	All			
<b>3.0: Flat Fee activities</b>				\$65,000
Task 3.1 Representation before entities, agencies, government officials,	All	1		
<b>4.0: Optional Services/Add-Ons</b>				
Visits of elected officials and staff to Tallahassee and Washington D.C.	TBD			
Development and securing specific special bills or legislation	TBD			
Development of specific grant proposals and applications	TBD			
Other as needed special services	TBD			
<b>Total:</b>				\$97,000

**Section D: Licenses, Insurance, Certifications and Registrations**

- Ms. Deady is:
  - Licensed by the Florida Bar,
  - Licensed by the U.S. District Court for the Northern District of Florida
  - Licensed by the U.S. Eleventh Circuit Court of Appeals.
  - Registered as a lobbyist in Palm Beach and Broward Counties.
  - A certified land planner by the American Institute of Certified Land Planners
  - A certified Leadership in Energy and Environmental Design ("LEED") AP by the U.S. Green Building Council
- Mr. Ramba is:
  - Licensed by the Florida Bar
  - Licensed by the U.S. Eleventh Circuit Court of Appeals
  - A Supreme Court certified County Court Mediator for the Second Judicial Circuit
  - Registered on behalf of all principals represented before the Florida Legislature and Executive Branch
- Mr. Adams complies with the Lobbying Disclosure Act (LDA) whereby individuals who are paid for lobbying at the federal level must register with the Secretary of the Senate and the Clerk of the House. Lobbyists must file regular quarterly reports of lobbying activity and semi-annual contributions reports.

**RESOURCE GROUP  
AND  
JORDAN CONNORS GROUP**

# Re:source Group N.A.

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March 6, 2013

Mr. Ed De La Vega  
Village of Wellington  
12300 Forest Hill Boulevard  
Wellington, Florida 33414

**Re: Letter of Interest – Lobbying Services**

Dear Mr. De La Vega,

The firms of Resource Group N.A. and Jordan Connors Group are submitting a joint proposal for consideration to provide state, local and federal lobbying services on behalf of the Village of Wellington.

With a combined business and political experience of more than 50 years, the founders of Resource Group N.A. and Jordan Connors Group have built a reputation for integrity and credibility with our clients, elected officials and decision makers. We work hard to understand clients' objectives and issues, and utilize our extensive knowledge of the legislative and regulatory process and our long-standing, trusted relationship with government officials to achieve clients' goals.

The Resource Group and Jordan Connors Group have successfully represented numerous governmental entities within Palm Beach County and the Treasure Coast, including: City of Palm Beach Gardens, City of Riviera Beach, City of Pahokee, City of Lake Worth, City of Port St. Lucie and the Palm Beach County Sheriff's Office. Our firms have secured significant amounts of funding for infrastructure improvements and social services projects on behalf of our clients.

I have enclosed additional information as required by the Letter of Interest notice. The Resource Group and Jordan Connors Group appreciate the opportunity to submit this proposal to the Village of Wellington.

Sincerely,

A handwritten signature in black ink, appearing to read 'Thomas DeRita, Jr.', with a large, stylized flourish at the end.

Thomas DeRita, Jr.  
Founder & CEO

## **Qualifications of Firms**

### **Resource Group N.A.**

Resource Group N.A. is a full-service government relations and business development firm serving clients throughout Florida and the nation. Currently headquartered and managed in West Palm Beach (777 South Flagler Drive, Suite 300 East), Florida, the Resource Group also maintains an office in Tallahassee to better serve our clients' needs. The Resource Group is fully licensed and accredited within the State of Florida, employing its Founder and CEO Thomas DeRita, Jr as a registered Florida lobbyist.

Since 1999, the Resource Group has been producing solutions and results for our diverse client base of governmental entities, national corporations, trade associations, local businesses and non-profit organizations. The Resource Group has built a reputation of integrity and credibility among our clients and within our community. Thomas DeRita has more than 40 years of business development and political experience.

The Resource Group creates and implements effective government relations strategies design to win support from lawmakers, officials and staff for our clients' policy initiatives and funding requests. Our clients depend on sound strategic advice, lobbying expertise and established relationships with key legislative and governmental contacts at the local, state and federal level.

The Resource Group has successfully represented numerous governmental entities within Palm Beach County and the Treasure Coast, including: City of Palm Beach Gardens, City of Riviera Beach, City of Pahokee, City of Lake Worth, City of Port St. Lucie and the Palm Beach County Sheriff's Office. The Resource Group also represents Place of Hope, Protect Our Beaches, Children and Family Connection, Arrigo Dodge and Pero Family Farms.

By working collaboratively with our clients, as well as with local, state and federal officials and their staffs we have been able to significant secure significant amounts of funding for infrastructure improvements and other appropriations.

### **Jordan Connors Group**

Jordan Connors Group is a state and local government relations firm located in Port St. Lucie Florida. Established in 2009, the firm has provided state lobbying services on behalf of the City of Port St. Lucie, Torrey Pines Institute for Molecular Studies, Alzheimer's Community Care, Ocean Research and Conservation Association and Sky King Unlimited.

M. Jordan Connors is the President and CEO of the Jordan Connors Group. He is a registered Florida lobbyist. Since 2001, he has served as the state lobbyist for the City of Port St. Lucie. During his tenure he has assisted the City to develop and implement its state legislative agenda. He works closely with the Treasure Coast Legislative Delegation and advocates the City's agenda before the state legislature and executive branch.

He has worked professionally in the government relations arena for more than two decades. In that



time, he has been involved in the legislative and regulatory process on the federal, state and local level. He has held positions in Florida government, the Florida Legislature, the Florida Governor's Office in Washington, D.C. and two professional trade associations.

Connors has represented numerous types of non-profit organizations, leading business firms and local governments. He provides consulting and representation on matters involving health care, transportation, appropriations, infrastructure, economic development, communications and business development issues.

Prior to founding the Jordan Connors Group, he co-founded Resource Group N.A., a business and government relations consulting firm. He served as the lead lobbyist for several Florida municipalities. For ten years, he directed the firm's state lobbying business.

Connors worked in the State of Florida Washington Office as a senior policy analyst. During his tenure he worked on important issues such as the Everglades Restoration project and a multi-billion dollar federal disaster relief package for Hurricane Andrew. He served as a Liaison between the State of Florida and the Florida Congressional Delegation.

Connors served as the chief state lobbyist for the Home Health Services and Staffing Association (HHSSA) in Alexandria, Virginia and the American Society of Civil Engineers (ASCE) in Washington, D.C.

### **Experience/Scope of Services**

Resource Group and Jordan Connors Group offer complete legislative representation in Tallahassee during the legislative session, special session and at Senate and House interim hearings. In addition, we have successfully represented clients before multiple governors, administrative agencies, boards, and commissions including participation in active rule making proceedings. Moreover, the Resource Group offers a similar level of support and representation at the federal level in Washington, D.C. The Resource Group continues to maintain excellent working relationships with Palm Beach County's Congressional Delegation.

We stay abreast of the current congressional trends, legislative issues, and potential federal appropriations, grants, or other funding opportunities. The Resource Group also works with the executive branch and its numerous administrative agencies. For example, in 2007, after Hurricane Wilma, the Resource Group was instrumental in helping the City of Palm Beach Gardens navigate the federal bureaucracy and receive \$1.7 million in Federal Emergency Management Agency (FEMA) disaster cleanup reimbursement funds.

Recently the Resource Group has worked with a number of clients within Palm Beach County including:

**Children and Family Connection (CFC)** – worked with CFC, state legislators and the Governor's office to pass legislation that provides for a more equitable distribution of state funds to the individual Community Based Care providers.

**Pero Family Farms** – represented Pero Family Farms before the County Commission and South

Florida Water Management District for many years regarding agricultural land leasing and the sale of District owned land.

**Palm Beach County Sheriff's Office** -- worked with the Governor's Office to secure a \$3.5 million dollar Gang Task Force Grant, which was awarded to Palm Beach County to use in a regional effort to contain gang violence. In addition, worked with the U.S. Bureau of Prisons to obtain a new per diem rate for U.S. Marshall prisoners housed in county facilities. This resulted in an additional \$6.17 million dollars for Palm Beach County.

Drawing on our extensive experience at the local, state and federal level, Resource Group and Jordan Connors Group will utilize their knowledge and expertise to advocate the Village of Wellington's legislative agenda at every level of government. Specifically, we will work with the Village's elected officials and staff to identify, prioritize and determine the feasibility of funding projects. We will continue to develop our relationships with local, state and federal level, and utilize those relationships to advocate the Village's needs and advantages of identified funding projects. We will implement a strategy of coalition building, by generating support for identified projects among elected officials in differing levels of government and across party lines. We believe that by creating a regionalized and consistent support network that begins at the local level and extends up through our federal elected officials, we will continue to realize success and bring increased funding and levels of service to the citizens of the Village of Wellington.

### **Appropriations Projects Awarded**

**The following projects were secured by the Resource Group and the Jordan Connors Group:**

Alzheimer's Community Care Service Programs - \$8,700,000  
Alzheimer's Community Care Medicaid Waiver Program - \$1,500,000  
Alzheimer's Community Care Capital Outlay - \$550,000  
Alzheimer's Community Care PBC Grants - \$200,000

City of Lake Worth Reverse Osmosis Plant - \$750,000  
City of Lake Worth Reverse Osmosis Plant SFWMD Grant - \$1,000,000  
City of Lake Worth Reverse Osmosis Plant Federal Appropriation - \$200,000  
City of Lake Worth Casino Pool - \$200,000  
City of Lake Worth Sound Wall - \$2,000,000  
City of Lake Worth County Recreation Bond Grant - \$5,000,000

City of Pahokee Water Main Improvements - \$400,000  
City of Pahokee Marina Project - \$650,000  
City of Pahokee Sago Palm Project - \$5,000,000

City of Palm Beach Gardens Burns Road Widening - \$3,900,000  
City of Palm Beach Gardens Lilac Park - \$200,000  
City of Palm Beach Gardens City Park II - \$200,000  
City of Palm Beach Gardens PGA Boulevard Improvements - \$1,200,000  
City of Palm Beach Gardens Turnpike Interchange Buffer Enhancements - \$2,100,000

City of Palm Beach Gardens Turnpike Improvements - \$3,000,000  
City of Palm Beach Gardens Flood Control Federal Funds - \$5,000,000  
City of Palm Beach Gardens FEMA Funds - \$1,700,000  
City of Palm Beach Gardens FRDAP Grants - \$700,000  
City of Palm Beach Gardens PBC District Funds - \$2,000,000

City of Port St. Lucie Westport Wastewater Treatment Reuse - \$1,000,000  
City of Port St. Lucie West Virginia Corridor Bridge - \$20,000,000  
City of Port St. Lucie West Virginia Corridor Federal Highway Bill - \$2,500,000  
City of Port St. Lucie Western Library - \$500,000  
City of Port St. Lucie Glades Wastewater Treatment Plant - \$1,500,000  
City of Port St. Lucie Charles E. Ray Neighborhood Park - \$200,000  
City of Port St. Lucie East Port Neighborhood Park - \$172,053  
City of Port St. Lucie Jessica Clinton Community Park - \$200,000  
City of Port St. Lucie Walton Road From Village Green Dr. To Lennard Road - \$2,963,640  
City of Port St. Lucie SR 716 Port St. Lucie From Turnpike to Petunia Ave. - \$3,080,238  
City of Port St. Lucie Port St. Lucie Boulevard From Becker Road to Darwin Blvd. - \$2,000,000  
City of Port St. Lucie Savona Boulevard From Gatlin Boulevard to North of the C-24 - \$1,641,813  
City of Port St. Lucie California Boulevard Sidewalks - \$150,000  
City of Port St. Lucie Westmoreland Boulevard Improvements - \$3,400,000

City of Riviera Beach Relocation of US 1 - \$17,000,000  
City of Riviera Beach Transportation Road Fund Grant - \$2,000,000  
City of Riviera Beach Blue Heron Boulevard Improvements - \$3,000,000  
City of Riviera Beach/Port of Palm Beach 13<sup>th</sup> Street Improvements - \$4,200,000  
City of Riviera Beach TOP Grant SR 710 - \$3,000,000  
City of Riviera Beach SR 710 Improvements Federal - \$5,000,000  
City of Riviera Beach TOP Grant US 1 - \$1,000,000  
City of Riviera Beach City Water Park - \$150,000  
City of Riviera Beach Surface Water Improvements - \$875,000  
City of Riviera Beach EDA Federal Grant - \$2,000,000  
City of Riviera Beach PBC District Funds - \$3,000,000  
City of Riviera Beach Lift Station Improvements - \$500,000  
City of Riviera Beach SR-A1A from Blue Heron Blvd/US-1 to S. of Burnt Bride - \$3,500,000

Ocean Research and Conservation Association - \$500,000

Palm Beach County Sheriff's Office Gang Taskforce Grant - \$3,500,000  
Palm Beach County Sheriff's Office - \$6,170,000 from US Bureau of Prisons

Place of Hope Foster Care - \$800,000

### **List of Clients (Past 5 years)**

Alzheimer's Community Care  
Arrigo Dodge  
Auburn Development  
Bob Gonstead

Christine Menedis  
Child & Family Connections  
City of Pahokee  
City of Palm Beach Gardens  
City of Port St. Lucie  
Everglades Venture Company, LLC  
Florida Marine Safety Coalition, Inc.  
Health Care District of Palm Beach County  
Historical Society of Martin County, Inc.  
Jon E. Schmidt – Tread Carbons, Inc.  
Obagi Medical Products, Inc.  
Ocean Research & Conservation Association, Inc.  
Pero Family Farms  
Palm Beach County Sheriff's Office  
Parry Goodman  
Place of Hope  
ProJust  
Ralph F. Schenck, Jr.  
Sabco, Inc.  
Sky King Unlimited  
Zo Skin Health, Inc.

## **References**

The Honorable Ric Bradshaw  
Sheriff, Palm Beach County  
561-688-3212

The Honorable Joseph Abruzzo  
Florida State Senator  
561-791-4776

The Honorable Shelley Vana  
County Commissioner, Palm Beach County  
561-355-2203

Bob Gonstead  
Protect Our Beaches  
561-628-6682

The Honorable JoAnn Faiella  
Mayor, City of Port St. Lucie  
772-871-5159

Donald Cooper  
CFO, Torrey Pines Institute for Molecular Studies  
772-345-4592

## **Proposed Rate Structure**

We propose a \$5,000 per month retainer for twelve months. Any out-of-state travel expenses incurred by our firms may be reimbursable only if the expenses are pre-approved in writing by the City Manager.

777 South Flagler Drive • Suite 300 East • West Palm Beach, Florida 33401  
Tel: 561-833-5126 • Cell: 561-719-2977 • Fax: 561-775-4907 • [tomderitafl@gmail.com](mailto:tomderitafl@gmail.com)



**SUNDSTROM, FRIEDMAN & FUMERO, LLP**

**AND**

**VAN SCOYOC ASSOCIATES, INC**

PROPOSAL TO PROVIDE STATE, LOCAL AND FEDERAL LOBBYING SERVICES FOR:

*The Village of Wellington, Florida*  
*Request for Letters of Interest*

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Jointly Submitted by:

Sundstrom, Friedman & Fumero, LLP

And

Van Scoyoc Associates, Inc.

March 6, 2013

SUNDSTROM,  
FRIEDMAN & FUMERO, LLP  
Attorneys | Counselors



VAN SCOYOC  
ASSOCIATES

Sundstrom, Friedman & Fumero, LLP | Van Scoyoc Associates Inc.  
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SUNDSTROM,  
FRIEDMAN & FUMERO, LLP  
Attorneys | Counselors



VAN SCOYOC  
ASSOCIATES

March 6, 2013

Ed De La Vega  
Purchasing Department  
Village of Wellington  
12300 Forest Hill Boulevard  
Wellington, Florida 33414

**RE: Request for Letters of Interest to provide State, Local and Federal Lobbying Services**

Dear Mr. De La Vega,

Sundstrom, Friedman & Fumero, LLP (SFF) and Van Scoyoc Associates Inc. (VSA), collectively the "Team," are pleased to submit the attached response to the Village of Wellington's (the "Village") Request for Letters of Interest to provide State, Local and Federal Lobbying Services. We believe our Team is uniquely qualified and situated to provide the Village with a partnership that will yield significant and beneficial results.

SFF is a statewide law firm that specializes in, and has a 25 year track record, of representation of local governments before all three branches of state government: judicial, legislative and executive. Meanwhile, VSA is a full-service, bi-partisan Federal lobbying firm that was founded in 1990 and has grown to be one of the most successful independent firms in Washington, D.C. SFF and VSA have well established contacts and experiences with key senior staff at the legislative and executive branches on both the state and Federal levels and have a track record of working together to achieve success on behalf of our mutual clients.

Together, our team for the Village combines nearly two centuries of Federal and Florida experience. This experience combines an insider's knowledge of both Capitols and Executive Branches with an excellent record of representing Florida local governments in Washington, D.C., and in Tallahassee, Florida.

Sundstrom, Friedman & Fumero, LLP  
Van Scoyoc Associates, Inc.  
March 6, 2013  
Page 2

Our team has excellent working relationships with the Florida Congressional Delegation, other relevant Members of Congress, members of the Florida House and Senate, and key Federal and Florida agencies, all of which will enable us quickly to identify pertinent opportunities in Washington and Tallahassee available to the Village.

While we are two separate firms, we have extensive experience over nearly the past decade working as a cohesive unit on behalf of other Florida local governments, including Lee County. Our efforts on their behalf have been extremely successful. We propose to replicate that cohesive team effort on behalf of the Village. As the team leaders, our contact information is:

John J. Fumero, Partner  
Sundstrom, Friedman & Fumero, LLP  
7700 Congress Ave  
Suite 2201  
Boca Raton, FL 33487  
(561) 982-7114  
(561) 982-7116 – fax  
[jfumero@sfflaw.com](mailto:jfumero@sfflaw.com)

Greg Burns, Vice President  
Van Scoyoc Associates, Inc.  
101 Constitution Ave. NW  
Suite 600 West  
Washington, DC 20001  
(202) 737-8162  
(202) 638-7714 – fax  
[gburns@vsadc.com](mailto:gburns@vsadc.com)

Thank you very much for the opportunity to present this proposal. Please contact us should you need additional information or have questions.

Sincerely,



John J. Fumero, Partner  
Sundstrom, Friedman & Fumero, LLP



Gregory D. Burns, Vice President  
Van Scoyoc Associates, Inc.

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## *SFF & VSA Qualifications*

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### **Knowledge about the legislative process at the State, local and Federal level**

SFF Team Leader, John Fumero, has spent 15 years in the public sector including serving as General Counsel and Director of Government and Legislative Affairs for the South Florida Water Management District (SFWMD). In this capacity, he spent a great deal of time working with the Florida Legislature and understands the inner workings of the legislative process. Since entering private practice in 2003, Fumero has continued his involvement with the State Legislative process by representing local governments before all three branches of Florida Government – legislature, executive and judicial. With a Tallahassee Office, SFF has direct and ready access to the Florida Legislators and their staffs year round. Additionally, the SFF Team has former local government attorneys with hands on experience in tracking legislative actions and the potential impacts to local government operations, including Home Rule/preemption issues and unfunded mandates.

VSA Vice President Greg Burns will lead the VSA team for the Village of Wellington, along with Steve Palmer, Vice President and Nate Potter, Manager, Government Relations. The VSA team will be overseen by VSA President and CEO “Stu” Van Scoyoc. These team members have extensive experience working on Capitol Hill, in Executive Branch agencies, and as Federal advocates on behalf of Florida government entities as described in more detail below. The strengths of our team members, given their experience working with and in a number of Federal agencies, will give the Village of Wellington an excellent opportunity to proactively respond to the changing climate in Washington and succeed via policy, programmatic, and other funding opportunities.

### **Previous public relations/lobbying experience and a network of contacts with policymakers**

SFF and VSA are bi-partisan, full-service Government relations firms that provide comprehensive Legislative and Executive Branch strategic advice, liaison service, and advocacy. We are known for the knowledge and experience of its principals, which allow us to develop and implement creative solutions to seemingly intractable problems. We achieve results.

Our clients include many public and private interests, such as city and county governments, water and flood control districts, public transportation agencies, major research universities, defense contractors, hospitals, health care and research consortia, economic development authorities, and Fortune 500 companies.

Our team members have extensive experience working in Tallahassee, Washington, D.C., and locally as advocates on behalf of Florida government entities. The strengths of our team members, given their experience working with and in a number of State and Federal legislative offices and agencies as well as government regulatory bodies, will give the Village of Wellington an excellent opportunity to proactively respond to the changing political climate and succeed via policy, programmatic, and other funding opportunities.

As previously mentioned, SFF in general and Mr. Fumero specifically, have extensive lobbying experience. Mr. Fumero has represented the SFWMD in both Washington, D.C. and in Tallahassee. He now represents local governments such as Lee County before the State Legislature.

### **Strong communication skills to reinforce the clients’ position on the issues at hand**

We ensure that the Team possess the skills and experience to match the needs of the client, actively supported by others within our firms. This approach will give the Village a complete understanding of the work we do on your behalf. It is also important to note, however, that all of our firms’ resources may

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be drawn upon at any time. SFF and VSA truly foster a collaborative atmosphere, and have backgrounds that give the Village a broad base of experience from which to draw.

Greg Burns will be the primary point of contact for the Village for Federal affairs and John Fumero for State affairs. Both are available by phone and email, including outside of normal business hours.

With significant Florida legal and policy expertise, SFF and VSA are familiar with the legislative issues facing the Village – both past and present. In the legislative process, knowledge and credibility are paramount. SFF and VSA have both. Our local government representation has given both firm's extensive experience in drafting Position Papers, Talking Points and Scholarly White Papers on issues of interest to its clients and Legislators. The Village is a unique local government with unique issues in many respects. Many local governments do not face the environmental, water and regulatory challenges that the Village has, and will continue to deal with. In these areas, few, if any firms, have the depth of expertise and experience as SFF and VSA. However, our expertise and experience also moves beyond these areas and adds a broad array of local government issues of interest. We understand the importance of regular and timely communication with the Village Officials and representatives before, during and after the legislative sessions.

Based on our experience, we anticipate we will spend a significant percentage of time communicating with the Village in order to provide updates and respond to questions, while communicating the Village's agenda to key Federal and Florida officials. The Team will organize scheduled calls with the Village in order to ensure that we have a coordinated and active legislative strategy. We also will produce comprehensive status reports and summaries of our work on a regular basis.

While many communities have similar needs and objectives, our specific approach and methodology varies by client. The Team prides itself on being able to adapt to the different methods and structure each client finds most effective. Whatever methods you choose, all the content and information we create will be for the Village and will not be generic. It is our job to know what interests you and to ensure you have that information, not pass along irrelevant information.

#### **The ability to respond to regulatory inquiries and testifying at public hearings**

The Team will work diligently to keep the Village informed and updated regarding Florida and Federal legislation, initiatives, funding opportunities, and news through a variety of different sources. Team leaders John Fumero and Greg Burns will always be available to the Village to report on important actions. The Team will also prepare, with the assistance of Village staff for technical guidance, the following forms of research and information:

- Analyses of budget requests and forecasts for policies and programs of importance to the Village;
- Reports of, and testimonies from, relevant Committee hearings and markups;
- Memos on pertinent Federal and Florida initiatives or topics;
- Federal and Florida agency and departmental regulations, guidelines, directives, and other instruments of administrative policy;
- Grants and other funding opportunities for proposed Village projects;
- Technical reports and memoranda affecting Village operations and fiscal conditions;
- Copies of proposed legislation and associated reports;
- "White papers" and materials geared toward elected officials and their staffs that justify the Village's objectives in simple and straightforward language, providing the respective Legislative and the Executive Branches with the information they need to be successful on your behalf;
- Support or request letters for legislative sponsors to use with relevant committees or Florida and Federal agencies;

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- Any necessary forms for appropriations or authorizations requests;
- A briefing book for pertinent members of legislatures and legislative committee, the Executive Branch agencies, and their staffs, and
- Monthly itemized invoices for compensation related to services.

The Team will closely monitor the progress of pertinent bills, relevant agency regulatory developments, and significant budget discussions and legislation to ensure that the Village's priorities are considered by the appropriate authorities at every opportunity. Success depends upon timely input from Members of the Legislatures and their staffs to the committees. Similarly, careful coordination must be maintained with Florida and Federal agencies that administer the programs to make sure the agency demonstrates its interest. The Team will ensure that conversations are made at the right time, that timely correspondence is sent, and that agency officials communicate with Capitol Hill and Tallahassee.

With regard to Florida regulatory matters, few if any firms have the experience and expertise of SFF in the areas of regulatory matters. SFF's keen understanding of working within, and outside of local and state agencies brings tremendous capabilities. These capabilities include a command of regulatory issues and inquiries in Florida generally, and Palm Beach County, specifically. SFF and Mr. Fumero have testified before a myriad of local, state and federal public hearings and workshops. As such, SFF has the ability and deep experience to respond to regulatory inquiries and testify at public hearings and workshops.

#### **Good judgment and the ability to take initiative**

With extensive experience comes good judgment, knowledge and discretion. Having worked in various local, regional, state, and Federal agencies, VSA and SFF attorneys understand the critical need for good judgment in representation of the Village. In terms of initiative, we comprehend the importance of not being reactive, but rather proactive. From developing and refining legislative and policy positions and communicating those positions to all stakeholders, we have the ability to take the initiative. This means anticipating issues and concerns and getting timely and accurate information to the Village Officials and representatives.

#### **The ability to manage high levels of stress and meet critical deadlines**

Stress management and dealing with critical deadlines is something SFF and VSA do day in and day out. Stress management and deadlines have always been, likely will be, part and parcel of the legislative and lobbying arenas. Dealing with both effectively on a daily basis comes with the extensive knowledge of the Village, and its issues and needs that SFF and VSA maintain.



## SFF Background

**Background:** Sundstrom, Friedman & Fumero, LLP ("SFF") is a full-service law firm with broad experience and statewide reach. Originally formed in 1987 in Tallahassee, SFF now has offices in North, Central and South Florida. We are business-oriented lawyers equally adept in the courtroom or in the boardroom. We are counsel to private companies, investor-owned utilities, co-operatives and governmental clients including cities, counties and community development districts. SFF enjoys a statewide and national reputation in governmental, legislative, administrative, environmental, litigation, public utility and regulatory practice areas. Our attorneys and counselors have decades of experience in lobbying Florida's Executive and Legislative Branches, and appearing before numerous federal and state agencies, including the Department of Environmental Protection, the Water Management Districts, the Public Service Commission, and the Agency for Health Care Administration. We draw upon our collective experience to provide our clients with energetic, high-quality and cost-effective representation tailored to their needs. Our size and focused, interrelated practice areas provide significant advantages to our public sector clients. With our three locations, we can mobilize our resources quickly to address client needs.

Additionally, since each of our attorneys understands our related practice areas, we work together more effectively. Many of our attorneys were previously employed by, or have otherwise worked with, a variety of federal, state and local government agencies. Our firm is proud to have an AV rating from Martindale-Hubbell and to be listed in U.S. News and World Report's Best Law Firms in the areas of Administration/Regulatory Law and Health Care Law. Through these experiences, SFF has cultivated key agency contacts, expertise and relationships. These contacts and relationships offer a distinct advantage when dealing with the myriad of legislative and policy initiatives impacting local governments today.



### SFF Locations:

- 2548 Blirstone Pines Drive  
Tallahassee, Florida 32301
- 766 North Sun Drive, Suite 4030  
Lake Mary, Florida 32746
- 7700 Congress Avenue, Suite 2201  
Boca Raton, Florida 33487

Through our team of attorneys who know how to interpret and write legislation, we understand the needs and issues of local government representation. This includes command of governmental law such as the Sunshine and Public Records Laws in Florida. We also understand the need to work effectively as a Team with elected officials and Village staff. SFF has contacts and experience working with both the

Florida Association of Counties and the Florida League of Cities when appropriate and advantageous to our local government clients.

Mr. Fumero has been directly involved lobbying for and drafting landmark legislation such as the Florida Environmental Resource Permitting Law in Chapter 373, Fla. Stat., and the Federal Water Resource Development Act of 2000 – the bill formally launching the Comprehensive Everglades Restoration Plan (“CERP”).

SFF is already familiar with main of the challenges and issues which the Village has faced in the past and its priorities for the future. Having an office in Pam Beach County and being familiar with the region has given SFF unique experience and perspective to serve the Village. From Palm Beach County League of Cities to the Palm Beach County Legislative Delegation and beyond, SFF maintains a network of contacts within Palm Beach County and throughout Florida gives it extensive local and statewide reach.

SFF’s attorneys have extensive experience in pursuing and securing grant funds from various Florida agencies, including the Florida Department of Transportation (FDEP), SFWMD and the Florida Department of Economic Opportunity.





VSA Offices and U.S. Capitol

Van Scoyoc Associates Inc. (VSA) is a bi-partisan, full-service Federal Government relations firm that provides comprehensive Legislative and Executive Branch strategic advice, liaison service, and advocacy. VSA is known for the knowledge and experience of its principals, which allow VSA to develop and implement creative solutions to seemingly intractable problems. We achieve results.

VSA's clients include many public and private interests, such as city and county governments, water and flood control districts, public transportation agencies, major research universities, defense contractors, hospitals, health care and research consortia, economic development authorities, and Fortune 500 companies.

VSA is comprised of roughly 30 Vice Presidents, many of whom have held senior staff positions on Capitol Hill and in the Executive branch. The Vice Presidents are supported by 50 staff members, the majority of whom have recently held positions in Congressional offices and Federal agencies.

VSA Vice President Greg Burns will lead the VSA team for the Village of Wellington, along with Steve Palmer, Vice President and Nate Potter, Manager, Government Relations. The team will be overseen by VSA President and CEO "Stu" Van Scoyoc. These team members have extensive experience working on Capitol Hill, in Executive Branch

agencies, and as Federal advocates on behalf of Florida government entities. The strengths of our team members, given their experience working with and in a number of Federal agencies, will give the Village of Wellington an excellent opportunity to proactively respond to the changing climate in Washington and succeed via policy, programmatic, and other funding opportunities.

**History:** H. Stewart "Stu" Van Scoyoc established VSA in 1990 with "three employees, eight clients, a 5-pound cell phone, and the desire to compete," he likes to say. With annual client revenues in excess of \$29 million, VSA is the foremost provider of Federal representation in Washington that is independent of a larger law firm, public relations company, or other parent corporation.

**Service:** While our company is large, our core concepts make sure we tailor each government relations campaign to fit each client's needs and desires. VSA provides the human touch of a small entrepreneurial firm by assigning specific principals and staff to each client. We do not charge hourly fees that might impede regular two-way communication with clients. We want to encourage innovation and preserve as much freedom as possible for both clients and staff.

**Resources:** At the same time, VSA can summon the skill, expertise, and contacts of its entire staff on behalf of any client. VSA fosters a collaborative atmosphere, and several VSA principals have backgrounds that give our clients useful experience to draw on. VSA's record of accomplishment,



combined with our principals' hundreds of years of Legislative and Executive Branch experience make VSA a powerful advocate.

**Balance:** From its inauguration, VSA has carefully kept a bipartisan balance. That commitment makes VSA unusually effective today, when politics are more polarized than ever. Democrats and Republicans in roughly equal numbers make up the staff. With strong ties across party lines, in both Congress and the Executive Branch, VSA finds creative solutions to problems others deem intractable.

**Skill:** Gone are the days when Washington representation meant simply shepherding a client's proposal through the appropriations process. Building a case before the Federal Government now calls for action on a broad front. VSA understands how to navigate the new world of Federal relations in order to achieve success on behalf of our clients.

**Integrity:** In today's political atmosphere, a company offering Washington representation must be above reproach. Van Scoyoc Associates and its affiliated companies will always represent the Village in a dignified and ethical manner. We strictly abide by the provisions of the Honest Leadership and Open Government Act of 2007, including prohibitions on gifts, meals, and travel for elected officials and staff.

**Location:** VSA and its affiliate companies are located just steps from the Capitol at 101 Constitution Avenue NW, Washington, DC 20001. Clients are able to use VSA's guest offices during their visits to Washington.



Many Clients Use VSA's Capitol Room for Events

## *Village of Wellington Team*

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John Fumero, Partner, at SFF will be a Team co-leader and the lead for the State of Florida efforts for the Village. VSA Vice President Greg Burns will be a Team co-leader and lead the Federal efforts for the Village, along with Vice President Steve Palmer. They will be assisted by Nate Potter, Manager, Government Relations. The VSA team will be managed by VSA President and CEO “Stu” Van Scoyoc. These team members have extensive experience working on Capitol Hill, in Executive Branch agencies, and as Federal advocates on behalf of Florida government entities.

**John J. Fumero** serves as the Managing Partner of SFF. John J. Fumero has more than 25 years of experience practicing the areas of water, environmental, land use, legislative and governmental law. Mr. Fumero, formerly General Counsel and Director of Government and Legislative Affairs of the SFWMD, represents and provides strategic counsel to landowners, developers, industry, utilities and local governments throughout Florida. He represents clients before local, state and federal agencies and courts on a variety of matters, including state and federal regulation, legislation and rulemaking as well as federal National Environmental Policy Act regulations.



From Washington D.C. to Tallahassee, Mr. Fumero has had substantial involvement in the development of federal and state legislation and regulations. Mr. Fumero, in his capacity as General Counsel of the SFWMD and Director of Governmental and Legislative Affairs for the agency, was involved in the development of every major environmental and water-related legislation and rulemaking effort during his fifteen years with the water management district. For example, Mr. Fumero was involved in development of the environmental resource permit program and was part of the team that drafted the Environmental Resource Permit Program Regulations. Now in private practice, he continues his active legislative involvement on behalf of his local governmental clients. Further, Mr. Fumero has appeared numerous times in front of the State’s Governor and Cabinet, sitting as the Board of Trustees of the Internal Improvement Trust Fund and as the Florida Land and Water Adjudicatory Commission, and Division of Administrative Hearing proceedings. Mr. Fumero also represented the SFWMD as well as numerous other public and private clients in hundreds of administrative hearings and circuit court proceedings. Simply stated, Mr. Fumero is widely regarded as a leading expert in all aspects of environmental, water and administrative law, legislative and litigation in Florida.

Like many attorneys at SFF, Mr. Fumero is an “AV Preeminent Rated” attorney, the highest designation awarded by Martindale-Hubbell. He is also Board Certified as a specialist in State and Federal Government and Administrative Practice by the Florida Bar. Board Certification recognizes specialized knowledge, skills and proficiency in state and federal government and administrative law. Fewer than 260 lawyers hold this designation in the State of Florida. He also is a Florida Supreme Court certified mediator and holds certifications in Environmental Negotiation and Policy from Harvard Law School. A frequent author and lecturer, Mr. Fumero is one of the principal authors of the Florida Environmental and Land Use Law Treatise published by The Florida Bar.



Through this extensive experience and expertise, Mr. Fumero has cultivated key legislative and agency contacts, and relationships. These contacts and relationships offer a distinct advantage when dealing with and understanding the myriad legislative and regulatory issues facing local governments.

**Greg Burns** is a Vice President at Van Scoyoc Associates with an extensive background in lobbying and politics, experience in a wide range of issues, an insider's view of the legislative process, and contacts throughout Washington.



VSA team leader, Greg Burns, began his career on Capitol Hill, serving on the legislative staff of a Member of Congress. Since then, he has represented more than a dozen local governments in Florida, including seven current Florida clients: Charlotte, Lee, Martin, St. Lucie, and Volusia counties, as well as the cities of Clearwater and Coconut Creek. Several of Mr. Burns' Florida clients have been represented by him in Washington for a decade. He has excellent relationships within the Florida Congressional Delegation on both sides of the aisle.

Representing local and regional government entities and non-profits is a particular interest of Mr. Burns, and it fits well with his emphasis on forging personal connections with his clients and people in government.

"I like to spend a lot of time during the initial phases of a relationship, learning about my clients and their specific challenges. I need to know a community or non-profit well before representing it," he said.

That attention to detail pays off in many ways. "I value the personal ties with my clients that develop over time and generally become very strong," Mr. Burns said.

Mr. Burns lobbies Congress and the Executive Branch on issues such as Federal funding, water resources, transportation, economic development, public safety, and not-for-profit issues. His clients come from states as diverse as California, Florida, Oregon, and Texas.

Mr. Burns believes that policy or programmatic victories can often have a bigger impact on a community than a simple Federal earmark. And over the last few years, as earmarks have fallen out of favor, Mr. Burns' approach has been validated.

For example, he worked with one client to secure a two-year extension of the Preferred Risk Policy (PRP) rate for residents who must purchase new Federal flood insurance. With more than 8,000 new residences in the flood plain and PRP rates at least \$1,000 lower than regular flood insurance rates, the community may save nearly \$16 million in collective flood insurance premiums over two years.

In another example, he assisted a client in successfully securing \$2,941,500 from a Department of Energy competitive grant program to create a local Solar and Energy Efficiency revolving loan program. As another client summarizes, their "successes with the Federal government can be directly attributable to the efforts of Mr. Burns."

In the House of Representatives, Mr. Burns served on the legislative staff of former Rep. Darlene Hooley of Oregon, where he was responsible for telecommunications, health care, campaign finance reform, judiciary, and science. He also worked in the fields of financial services, transportation, foreign affairs, defense, and the environment during his time on the Hill.

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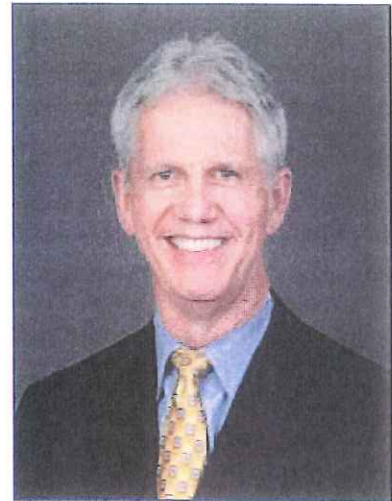
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Outside of Congress, Mr. Burns implemented and executed a lobbying agenda for the U.S. Public Interest Research Group in Washington, D.C. Before joining Van Scoyoc Associates, Mr. Burns was a lobbyist with Marlowe & Company, also in Washington, helping that company grow substantially. Apart from his current Florida clients, some of whom he also represented at his former firm, Mr. Burns has also represented the following Florida government entity clients during his career:

- Broward County
- Edison & Ford Winter Estates
- City of Flagler Beach
- City of Fort Pierce
- Indian River County
- Okaloosa County
- City of Sarasota
- SW Florida Water Management District
- St. Johns County
- City of Venice
- Walton County

Mr. Burns graduated from the University of Virginia with a Bachelor of Arts in Government and English, where he mixed his interest in campaign finance reform with a lifelong love of 20th century literature.

**Steve Palmer** serves as a Vice President at VSA, having joined the firm in 1998 after nearly 20 years on Capitol Hill and as the lead lobbyist at the U.S. DOT. For nearly twelve years at VSA, Mr. Palmer has developed a practice that includes transportation, homeland security, and economic development.



In 1993, Mr. Palmer was nominated by President Bill Clinton and confirmed by the Senate to serve as DOT's Assistant Secretary for Governmental Affairs, the key legislative strategist and lobbyist for the Secretary of Transportation and all of DOT. Working on a bipartisan basis with the Congress for more than five years, he helped secure passage of the Transportation Equity Act for the 21st Century, several FAA authorization and reform bills, as well as the annual DOT Appropriations bill. Mr. Palmer left DOT in 1998 as the longest serving Assistant Secretary for Governmental Affairs in history. In addition to his legislative accomplishments, he expanded outreach to local officials and organized constituency and grassroots support. He also coordinated discretionary grant activities for the Secretary.

Before his appointment to DOT, Mr. Palmer served more than ten years on the Senate Committee on Commerce, Science, and Transportation, including seven years as staff director of the Aviation Subcommittee and later the Science, Technology, and Space Subcommittee. Mr. Palmer began his congressional career on the Senate Budget Committee, after having completed an appointment as a Presidential Management Fellow at DOT.

Mr. Palmer received his Bachelor of Arts in political science from Kalamazoo College in Kalamazoo, Michigan. He earned a Masters of Public Affairs from the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin.



**Nate Potter** serves as Manager, Government Relations, for Van Scoyoc Associates, where he assists clients on such issues as appropriations funding, public infrastructure, transportation, public transit, energy, defense, and water resources.

Mr. Potter has more than a decade of bi-partisan experience in public policy, both at the national and local levels. Before joining VSA, Nate represented a number of local governments, water districts, public utilities, and transportation entities for five years for the Washington, D.C., lobbying firm of Gordon Thomas Honeywell – Government Affairs.



Mr. Potter's history in our nation's capital began in 1989 when he served as a page in the House of Representatives for former Congressman Al Swift from the state of Washington. Born and raised in the Seattle area, Mr. Potter received his undergraduate degree from the University of Washington. He went on to earn a master's degree in public administration from the Daniel J. Evans' School of Public Affairs at the University of Washington, with a focus on transportation, urban planning, and housing.

After working on Rep. Jay Inslee's successful 1998 campaign, Mr. Potter returned to Washington, D.C., to work as a Legislative Aide for both Rep. Inslee and Sen. Patty Murray, both Washington State Democrats. However, Mr. Potter has also proven his ability to work effectively across party lines. For example, he served as an aide to a conservative member of the San Diego County Board of Supervisors after graduate school handling such diverse issues as Indian affairs and community revitalization.

**H. Stewart "Stu" Van Scoyoc** is the President and Chief Executive Officer of the Van Scoyoc Companies. He has built his companies into Washington's largest lobbying and consulting organization independent of a law firm or large corporation. The firm typically ranks third in lobbying revenue among Washington companies.

Along the way, Mr. Van Scoyoc and his companies earned a reputation for care, results, and ethical behavior. Only a few years after the firm opened its doors, The National Journal noticed that "colleagues consider Van Scoyoc a brainy Washington insider who sweats the details."



Mr. Van Scoyoc is regularly interviewed by leading publications for his insights into politics, Congressional activities, and lobbying. Journalists have come to value his candor and ability to communicate complex ideas simply.

Mr. Van Scoyoc's business formula is built on "hiring smart, entrepreneurial people with plenty of energy, and then getting out of their way," he said. His staff's professional development tends to parallel his own evolution, starting with mastery of one technical field, and then expanding from there.

Mr. Van Scoyoc earned a Bachelor of Science in Chemical Engineering from Lehigh University in 1969, where he also received the Alpha Phi Omega Award for Leadership and Outstanding Service to the

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University. For several years, he worked as an engineer for the DuPont Company, while earning a law degree at night from the University of Maryland.

Mr. Van Scoyoc came to Washington and joined DuPont's government affairs office handling legislative and regulatory issues. He then spent eight years as Vice President at Charles Walker Associates, a well-known lobbying company, where he focused on tax, energy, insurance, and environment. Striking out on his own, he became a founder of the Winburn, Van Scoyoc & Hooper government relations firm.

In 1990, Mr. Van Scoyoc created Van Scoyoc Associates Inc., with a focus on Congressional appropriations and taxation. That company quickly developed more than 20 practice areas, ranging from agriculture, biotechnology, defense and foreign affairs, and education, to financial services, energy, homeland security, transportation, and telecommunications.



## Examples of Success

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### *The Team*

SFF and VSA have teamed up with incredible success for Lee County, Florida. For more than seven years, the Team has successfully advocated for Lee County's Federal and Florida interests. In 2005, Lee County created the "Water Resource Initiative," an internal and external team established to protect and preserve Lee County's natural resources and its tourism based economy. Leading the Florida efforts is Mr. Fumero while Mr. Burns has led the Federal efforts. Together, they created a powerful influence on the development and implementation of water policy at the state and Federal levels that resulted in:

- The landmark legislation, Northern Everglades Estuaries Protection Program Act, and the implementation of the Caloosahatchee River Watershed Protection Plan
- Over \$75 million in State dollars for water resource projects
- Approval of new U.S. Army Corps of Engineers Lake Okeechobee Regulation Schedule
- A completed Army Corps of Engineers Chief's Report for the nearly half-billion dollar C-43 Reservoir project
- Tens of millions of Federal funding for shore protection and water quality improvement projects
- Overhaul of SFWMD Adaptive Protocols for Lake Okeechobee
- Adoption of Total Maximum Daily Loads (TMDLs) and Caloosahatchee Basin Management Action Plan for the tidally influenced portions of the Caloosahatchee River

This team approach has resulted in significant legislative victories, favorable policy changes and substantial financial benefits for Lee County.

### *SFF Examples of Success*

On behalf of other clients in Florida, SFF has represented and continues to represent a number of public entities throughout the state. Our local government clients have an array of needs and concerns, are geographically and politically diverse, and run the spectrum from some of the largest local governments to some of the smallest.

In addition to our collaborative success with VSA and Lee County, mentioned above, we have listed a small sample of our accomplishments below organized by issue areas that often affect local governments. In each section, you will find specific examples of our successes with clients similar to the Village.

**Client:** City of Ft. Lauderdale, City of Boca Raton, City of Delray Beach and Town of Highland Beach  
**Services performed/Strategies employed:** Coordinated a united effort to modify and/or challenge the SFWMD's proposed District-Wide Year-Round Conservation Rule that would have negatively impacted local government water resource management capabilities.

**Examples of specific result achieved:** SFWMD adopted a modified District-Wide Year-Round Conservation Rule that allowed flexibility for three day a week irrigation schedule for our clients.

**Client:** Lee County Division of Natural Resources

**Services performed/Strategies employed:** SFF worked with Lee County Division of Natural Resources staff to highlight the inequities in the draft Basin Action Management Plan for the Caloosahatchee River

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Estuary Total Maximum Daily Loads for Nitrogen. SFF facilitated a meeting with high ranking Florida Department of Environmental Protection (FDEP) officials to voice Lee County's concerns.

**Examples of specific result achieved:** The Basin Action Management Plan for the Caloosahatchee River Estuary Total Maximum Daily Loads for Nitrogen was modified to add language addressing Lee County's concerns.

**Client:** Lee County Division of Natural Resources

**Services performed/Strategies employed:** Worked with Lee County Natural Resources staff to apply targeted pressure and provided clear, accurate information related to the legislative efforts to preempt local government's ability to regulate the use and application of fertilizer.

**Examples of specific result achieved:** Implementation of a successful local fertilizer ordinance that continues to be valid today despite annual legislative efforts to preempt such regulatory authority.

**Client:** Multiple Clients

**Services performed/Strategies employed:** On behalf of a number of our local government clients, SFF has been heavily engaged in the development of the Environmental Protection Agency's (EPA) and FDEP's proposed numeric nutrient criteria.

**Examples of specific result achieved:** FDEP has adopted a Numeric Nutrient Criteria Rule that has the necessary flexibility and will not burden local communities.

**Client:** Lee County Public Works Division

**Services performed/Strategies employed:** SFF provided strategic counsel to Lee County Public Works staff in responding to U.S. Army Corps of Engineers (Corps) withdrawal of the County's mitigation permit application. SFF mobilized its resources to meet with high ranking military and civilian Corps officials.

**Examples of specific result achieved:** Achieved concurrence from the Corps that Lee County Public Works could continue to pursue its desired mitigation permit application.

**Client:** Lee County Utilities

**Services performed/Strategies employed:** SFF provided strategic counsel to Lee County Utilities staff in preparing, submitting and defending an application to the SFWMD for renewal of a consumptive use permit from three sources of water (Caloosahatchee River, Green Meadows Wellfield, and the Corkscrew Wellfield) that will provide water supply to over 250,000 people in Lee County.

**Examples of specific result achieved:** Lee County Utilities timely received this critical permit approval and successfully secured the permit without the need of additional costly studies and modeling. Additionally, two permit challenges were successfully dismissed at little cost to Lee County Utilities.

**Client:** City of Riviera Beach Utilities District

**Services performed/Strategies employed:** Reviewed, evaluated and provided strategic counsel on a SFWMD consumptive use permit application that was pending for nearly 15 years. SFF facilitated a new approach to the application with City and SFWMD staff.

**Examples of specific result achieved:** After retaining SFF, the consumptive use permit application was approved by the SFWMD in less than two years.

**Client:** City of Flagler Beach

**Services performed/Strategies employed:** SFF represented the City of Flagler Beach in a water and wastewater service territory dispute among the City, Flagler County and City of Palm Coast over service to the Hammock Beach development of Bobby Ginn and other service corridors.



**Examples of specific result achieved:** SFF was instrumental in fashioning a settlement that brought all parties together and resulted in funding for substantial system upgrades to the City's wastewater system.

**Client:** Bonita Springs Utilities, Inc.

**Services performed/Strategies employed:** SFF has working closely with this co-op as special counsel since the mid-1980s. This representation has included a series of Industrial Development Revenue financings, securing tax-exempt status and addressing other federal and state tax issues, service area expansion, work on assessment programs and other rate issues, and negotiating a Franchise Agreement among the Company, the recently incorporated City of Bonita Springs and Lee County.

**Examples of specific result achieved:** During its tenure as Special Counsel, Bonita Springs Utilities grew from a small, rural water system to a state-of-the-art utility serving over 40,000 connections and eliminated over 40 package plants serving mobile home parks, providing area wide environmental benefits.

### *VSA Examples of Success*

Under contract for a variety of public entities, VSA represents more than 30 million Americans in nearly every state in the country. Our clients have an array of needs and concerns, are geographically and politically diverse, and run the spectrum from some of the largest local governments to some of the smallest.

Many of our public entity clients have been with the firm for a decade or more. Many others, including several government entities, switched to VSA after using other advocacy firms for many years. These clients wanted a fresh approach to their Washington, D.C. representation, particularly as times have changed and earmarks are no longer available, at least in the near term. They have chosen VSA due to our breadth and depth of knowledge and experience, as well as the results we continue to deliver for our clients. Some of these "new" clients include:

- Charlotte County, Fla.; population nearly 160,000
- City of Clearwater, Fla.; population more than 100,000
- City of Coconut Creek, Fla.; population more than 50,000
- City of Long Beach, Calif.; population more than 450,000
- El Paso County, Texas; population 800,000
- San Diego County, Calif.; population more than 3 million

In addition to our collaborative success with VSA in Lee County, mentioned above, we have listed a small sample of our accomplishments below organized by issue areas that often affect local governments. In each section, you will find specific examples of our successes with clients similar to the City of Santa Ana. All of the accomplishments below have been performed by the principals that make up the VSA/City of Santa Ana team.

**Grants.** With fewer Congressional projects, or earmarks, the Federal agencies retain more money to distribute via competitive grants and competitions. This also means, though, that there is more competition for Federal grant money than ever. VSA has the insights and experience in the agencies to help the Village of Wellington produce competitive and compelling grant applications in almost every subject area.



VSA works closely with our client's grants management staff to provide early warning of impending grant competitions where clients have natural advantages or can satisfy particular needs. We also can explore and navigate the political complications that sometimes underlie "objective" grant competitions. VSA then provides an experienced, outside critique and close reading of grant applications to make them as successful as possible.

We have listed a small sample of our accomplishments below organized by issue areas that often affect local governments. In each section, you will find specific examples of our successes with clients similar to Wellington. To reflect the current climate in Washington, you will notice that none of the examples are related only to earmarked appropriations.

**Transportation and Infrastructure.** The VSA team has advocated successfully for transportation priorities in Florida and around the nation. VSA has helped secure Federal funding for transit, rail, and highway initiatives, while working to create new programs and funding opportunities for specific infrastructure projects.

The VSA team works closely with the House Transportation and Infrastructure Committee, the Senate Environment and Public Works Committee, the Commerce, Science, and Transportation Committee, and the Banking, Housing and Urban Affairs Committee on authorization and policy issues. VSA can be a powerful champion on transportation issues important to the Village and can emphasize the importance of funding opportunities for transit, passenger rail, aviation, and highway development and safety programs.

A diversified approach to transportation policy is critical. Our advocacy not only includes helping our clients understand how a proposed Federal policy or regulatory proposal directly affects a specific project, but how to secure funds for that project. Examples of projects that we have advocated on include:

**Client:** City of Visalia, Calif.

**Services performed/Strategies employed:** VSA worked with the City to fine-tune their project approach, set up a series of meetings with the Economic Development Administration to get their buy-in for the project, helped to draft the application, and finally secured Congressional support for the City's efforts.

**Examples of specific result achieved:** \$2 million in grant funding from the Economic Development Administration to improve a key segment of Plaza Drive, a major arterial road off State Route 198, which significantly improves access to the Visalia Industrial District

**Client:** Galveston County, Texas

**Services performed/Strategies employed:** VSA worked with the entire Texas Delegation to highlight the importance of this bridge reconstruction project and the unique pot of Federal funding from which it could draw as a Coast Guard-identified Truman-Hobbs bridge (meaning that the bridge was identified as an impediment to navigation). After securing earmarked appropriations for the bridge for a number of years, the stimulus bill provided additional funding to the program and VSA worked directly with the Coast Guard to ensure the bridge was among its highest priorities. The project is currently under construction.

**Examples of specific result achieved:** \$49 million over several years for the reconstruction of the Galveston Causeway Railroad Bridge

**Client:** City of Manteca, Calif., St. Lucie County, Fla., Volusia County, Fla., Martin County, Fla.

**Services performed/Strategies employed:** VSA worked directly with Congress and the Census Bureau to highlight a problem with Census Bureau proposed urban area agglomerations.

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**Examples of specific result achieved:** Successfully fought a Census Bureau urban area agglomeration effort after the 2010 Census that would have negatively affected a number of clients by resulting in a loss of the ability to use Federal transit funding for operating expenses

**Client:** South Salt Lake City, Utah

**Services performed/Strategies employed:** VSA worked with the Utah Transit Authority and the cities of South Salt Lake and Salt Lake to secure funding for a new streetcar line through both communities. We worked closely with the Utah Congressional Delegation to highlight the importance of the project while also strongly advocating at any opportunity with the Federal Transit Administration so it understood how the project tied into new Administration priorities such as “livability.”

**Examples of specific result achieved:** \$26 million in grant funding from the Tiger II grant program to construct the Sugar House Streetcar project, which will link a thriving regional commercial center and redevelopment area to the highly successful regional TRAX light rail system

**Client:** City of Visalia, Calif.

**Services performed/Strategies employed:** VSA secured strong Congressional support for the City’s efforts to purchase new, more fuel efficient buses for their transit program to take people to Sequoia National Park.

**Examples of specific result achieved:** \$3,187,200 in grant funding for the purchase of hybrid buses and CNG trolleys from a Federal Transit Administration Clean Fuels grant

**Environmental and Natural Resources.** On behalf of a number of our local government clients, we have been heavily engaged in the Environmental Protection Agency’s (EPA) proposed numeric nutrient criteria, working with the Florida Delegation to ensure that EPA is flexible with a rule that will affect so many communities.

Our team is well versed in the nuances of Property Assessed Clean Energy (PACE) programs and has been working to free the program from burdensome Federal Housing Finance Authority rules. We have also secured nearly \$3 million in Department of Energy competitive grant funding for a client’s PACE program.

VSA also has valuable experience on water quality monitoring, flood control, storm water management, and the improvement of wastewater treatment systems. Over several years, VSA has secured more than \$50 million for the City of Santa Maria, Calif., to rehab old Corps of Engineers levees; secured \$275,000 for Lee County, Fla., for the implementation of a wastewater improvement project to provide central sewers to septic-system communities that lie in environmentally sensitive watersheds; \$300,000 to the City of South Salt Lake, Utah, for its waterline replacement project to increase capacity for fire protection and growth; \$800,000 to the Southwest Florida Water Management District, Fla., for a comprehensive regional water quality, storage, and environmental initiative, and \$500,000 to the City of San Clemente to expand the City’s reclaimed water plant, which will reduce the City’s reliance on surface water.

**Client:** St. Lucie County, Fla.

**Services performed/Strategies employed:** VSA introduced St. Lucie County to appropriate Department of Energy staff who then gave the County guidance, advice, and technical assistance before ultimately awarding them the competitive grant.

**Examples of specific result achieved:** \$2,941,500 from a Department of Energy competitive grant program to create a revolving Solar and Energy Efficiency loan program

**Client:** Martin County, Fla.

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**Services performed/Strategies employed:** VSA worked with Martin County and their oyster restoration team to highlight their project effectively to NOAA before the grant application date and also to buffer any criticism of the project due to the likelihood of future freshwater releases from Lake Okeechobee that might affect the oyster beds.

**Examples of specific result achieved:** \$4-million grant from NOAA for restoration of oyster beds in the Indian River Lagoon

**Public Safety, Emergency Response, and Disaster Recovery.** All local governments want to maintain public safety services during these times of deep budget cuts, if not improve them. VSA has helped our government entity clients obtain public safety funding through the Department of Justice and other Federal agencies for a number of initiatives.

These successes include \$400,000 to the City of Lompoc, Calif., for its Gang Assistance Surveillance Program, which allowed for the purchase of a mobile surveillance command vehicle and the installation of closed circuit video in specific areas of the City; \$200,000 to the City of Pismo Beach, Calif., for the installation of radio repeater towers throughout this long, mountainous community that removed dead spots faced by public safety officers throughout the City; \$100,000 to Jefferson County, Texas, for law enforcement interoperability improvements, and \$390,100 to the City of Flagler Beach, Fla., for emergency personnel technology improvements to improve the response to future hurricane events.

We have demonstrated creative ways to secure funding for government entity crime prevention efforts by targeting education and recreation funding. These include \$500,000 to the City of South Salt Lake, Utah, to improve after-school programs targeted at those who are susceptible to the allure of gangs; \$476,000 to a California non-profit that provides free after school tutoring and recreation programs for at-risk students, and \$100,000 to the City of South Salt lake, Utah, to establish a new community center at a low-income, heavily minority population housing complex for job training and English as a second language classes.

VSA works closely with the Department of Justice's Community Oriented Policing Services, the Byrne Local Law Enforcement Assistance Program, the Juvenile Justice Grant program, and the Justice Assistance Grant program, all of which will help in securing discretionary grant funds to reinforce safer neighborhoods. We also work closely with many of the Federal Emergency Management Agency grant programs, including those such as the Assistance to Firefighters Grants and the Staffing for Adequate Fire and Emergency Response Grants. VSA will provide expert guidance to the Village of Wellington to ensure that you are taking full advantage of Federal public safety programs that will protect your citizens.

Our team also has extensive experience working with the Federal Emergency Management Agency (FEMA) to help local governments respond to critical emergencies. VSA represents a number of coastal communities susceptible to natural (and man-made) disasters, both on the East and Gulf Coasts. For example, Greg Burns has helped St. Lucie and Martin Counties recover from Hurricanes Frances and Jeanne, Lee County as it recovered from Hurricane Charley, and Galveston County, Texas, as it still recovers from the devastation of Hurricane Ike.

We have expedited tens of millions of dollars in disaster recovery reimbursements to local governments after significant storms. For example, we worked to secure the reimbursement of \$7 million to a county for the repair of a major thoroughfare after a hurricane by working with both the Federal Highway Administration in both Washington and the state. We also helped a client secure reimbursement of over \$5 million for the rebuilding of a civic center, during which we worked closely with FEMA in both Washington and the state.

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**Client:** Galveston County, Texas

**Services performed/Strategies employed:** VSA worked closely with the office of Sen. Bill Nelson and the Texas Senate offices to ensure that they understood the vital need to extend the ability of local social service entities to access Social Services Block Grant funding provided to a number of states after several disasters in 2008. Given Sen. Nelson's role on the Senate Finance Committee, which had jurisdiction over the issue, we were able to resolve the problem and secure the extension in the Senate only days after it had passed the House. This was a huge victory that kept hundreds of millions of dollars from reverting back to the Treasury and kept it available to help recovery of the affected communities.

**Examples of specific result achieved:** Secured a one-year extension of Social Services Block Grant funding provided to a number of states, including Texas and Florida, to allow those jurisdictions to recover from the 2008 hurricane season

**Client:** St. Lucie County, Fla.

**Services performed/Strategies employed:** VSA applied targeted pressure and provided clear, accurate information to the right FEMA staff, including the head of the Public Assistance Division at FEMA headquarters, when St. Lucie County was getting little to no response from the state recovery office in Lake Mary regarding its need for reimbursement for a Clerk of the Courts reconstruction. That timely interaction with FEMA headquarters led to their intervention with the State office that ultimately led to the quick and positive resolution for the County.

**Examples of specific result achieved:** Secured approval from FEMA to reconstruct a Clerk of Courts building that was heavily damaged by storms, a project which will cost more than \$6 million

**Economic and Community Development.** The proposed VSA team for the Village has been successful in securing community and economic development funds for our clients, including \$300,000 for the City of San Clemente, Calif., to help construct the City's Coastal Rail Trail; \$380,000 for the City of South Salt Lake, Utah, for streetscaping along two main arterials, both increasing City beautification efforts and improving pedestrian safety; \$150,000 for the City of Santa Maria, Calif., to assist with the construction of a new City library; \$53.8 million for the construction of a new Federal courthouse in Fort Pierce, Fla., which serves as an economic catalyst for the City while also addressing the growing needs of the judicial system in South Florida, and \$1.1 million for the City of Pismo Beach, Calif., to complete the last phase of their beach front Promenade.

We work closely with the Economic Development Administration, the Department of Agriculture, the U.S. Export/Import Bank, and other Federal agencies in an effort not only to get funding, but also to create new opportunities for our clients' communities.

**Client:** Lee County, Florida

**Services performed/Strategies employed:** Assisted the client by setting up meetings for the client with the EDA in Atlanta and Washington, helping to draft their grant request, working closely with the agency to fine-tune the application, and securing Congressional support for the County's initiative.

**Examples of specific result achieved:** \$551,000 in grant funding from the Economic Development Administration to support the preliminary design, modeling, and permitting of wastewater and infrastructure improvements to serve the region's Renewable Energy and Research Diamond.

**Client:** City of Beaverton, Oregon

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**Services performed/Strategies employed:** Worked closely with the Department of Housing and Urban Development (HUD) when they initiated the Sustainable Communities programs after Congress provided the programs with funding. Informed the City of Beaverton of the opportunity and put City officials in front of the appropriate HUD officials to describe their plans and goals. Finally, helped the City fine-tune their application and successfully engaged their Congressional delegation in support of the City's effort.

**Examples of specific result achieved:** \$1 million from the Department of Housing and Urban Development's Sustainable Communities Grant to help develop the Beaverton Creekside District Master Plan. The plan will accelerate planning and implementation for the Creekside District project and produce a development program that integrates suitable and affordable housing with efficient transportation, green infrastructure and local amenities.

**Client:** St. Lucie County, Florida

**Services performed/Strategies employed:** The County has spent years and millions of dollars trying to develop the Treasure Coast Research Park. VSA introduced St. Lucie County to the relevant staff at the Economic Development Administration (EDA), helped develop the plan for the grant for the Treasure Coast Research Park, worked closely with EDA staff on the grant application, and secured substantial Congressional support for the County's initiative. We worked with Members of Congress and various Federal agencies to create a Federal nexus for the project and identify appropriate funding avenues.

**Examples of specific result achieved:** \$1,009,890 in grant funding for infrastructure development at the Treasure Coast Research Park from the Economic Development Administration

**Client:** Washington County, Ore.

**Services performed/Strategies employed:** VSA coordinated meetings with Department of Housing and Urban Development staff for Washington County, Ore., regarding the need to obtain additional Veteran Affairs Supportive Housing vouchers for residents and aggressively pushed the issue with the Department and the County's Congressional delegation.

**Examples of specific result achieved:** 25 vouchers for homeless veteran households.

**Education.** In another example of working with Federal agencies, VSA helped the Chicago Public Schools (CPS) work with the Administration and officials at the Department of Education to obtain the necessary authorization to undertake an ambitious Federally funded after-school tutoring program that resulted in significant cost savings to the school system. VSA helped coordinate efforts on behalf of CPS with the Illinois Congressional Delegation, the Senate Health, Education, Labor, and Pensions Committee, the House and Senate Appropriations Committees, and the House Energy and Commerce Committee to reverse proposed administrative decisions by the Centers for Medicare and Medicaid Services to discontinue schools-based Medicaid reimbursements.

## *SFF and VSA Client Lists*

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Sundstrom, Friedman, and Fumero and Van Scoyoc Associates both currently represent dozens of clients. Specifically, VSA represents more than 250 clients, including roughly 50 government entity clients, while SFF represents dozens of clients, including numerous Florida government entities. Our team is happy to provide contact information for any of our clients upon request.

Following is a list of our government entities. VSA has clients throughout the country, but also Charlotte, Lee, Martin, St. Lucie, and Volusia counties and the cities of Clearwater and Coconut Creek in Florida.

### *SFF Government Entity Clients*

- Bonita Springs Utilities
- Clay County Utility Authority
- City of Boca Raton
- City of Delray Beach
- City of Flagler Beach
- City of Ft. Lauderdale
- City of Riviera Beach
- Glades Utility Authority
- Lee County
- Martin County
- Palm Beach County Utility District
- Pasco County
- Town of Highland Beach

### *VSA Government Entity Clients*

- Alabama State Port Authority
- Alameda-Contra Costa Transit District, California
- Baldwin County Commission, Alabama
- Cambria Community Services District, California
- Charlotte County, Florida
- City of Akron, Ohio
- City of Baltimore, Maryland
- City of Beaverton, Oregon
- City of Calera, Alabama
- City of Cathedral City, California
- City of Clearwater, Florida
- City of Coconut Creek, Florida
- City of Dana Point, California
- City of Elk Grove, California
- City of Gadsden, Alabama
- City of Galt, California
- City of Glendale, Arizona
- City of Gulf Shores, Alabama
- City of Iola, Kansas
- City of Long Beach, California
- City of Manteca, California
- City of Newport Beach, California
- City of Norwalk, California
- City of Orange Beach, California
- City of Palo Alto, California
- City of Pismo Beach, California
- City of Portsmouth, Virginia
- City of Redlands, California
- City of Rocklin, California
- City of Rocklin, California
- City of Santa Maria, California
- City of Stockton, California
- City of Visalia, California

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- City of Westminster, California
- Clark County Public Transportation, Washington
- Clean Water Services, Oregon
- County of Del Norte, California
- Dallas Area Rapid Transit, Texas
- Doña Ana County, New Mexico
- Eastern Municipal Water District, California
- El Paso County, Texas
- Galveston County, Texas
- Georgetown Divide Public Utility District, California
- Lee County, Florida
- Martin County, Florida
- Merced County Association of Governments, California
- Mission Springs Water District, California
- Mobile County Commission, Alabama
- Montgomery Area Chamber of Commerce, Alabama
- Orange County Fire Authority, California
- Prince William County, Virginia
- San Bernardino Associated Governments, California
- San Diego County, California
- San Joaquin Area Flood Control Agency, California
- St. Clair County Commission, Alabama
- St. Lucie County, Florida
- Volusia County, Florida
- Washington County, Oregon



## *Client References*

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### *SFF and VSA Mutual Client References*

#### **Lee County**

Doug Meurer, Acting County Manager  
1500 Monroe Street, 3rd Floor  
Ft. Myers, FL 33901  
Phone: (239) 533-8899  
Email: [DMeurer@leegov.com](mailto:DMeurer@leegov.com)

#### **Lee County**

Kurt Harclerode, Operations Manager  
Division of Natural Resources  
1500 Monroe Street, 3rd Floor  
Ft. Myers, FL 33901  
Phone: (239) 533-8146  
Email: [KHarclerode@leegov.com](mailto:KHarclerode@leegov.com)

### *SFF Client References*

#### **City of Fort Lauderdale**

Albert Carbon, Public Works Director  
100 N. Andrews Avenue, 4th Floor  
Ft. Lauderdale, FL 33301  
Phone: (954) 828-5290  
Email: [albertc@fortlauderdale.gov](mailto:albertc@fortlauderdale.gov)

#### **Palm Beach County Utilities**

Bevin Beaudet, Director of Utilities  
8100 Forest Hill Boulevard  
West Palm Beach, FL 33413  
Phone: (561) 493-6001  
Email: [bbeaudet@pbwater.com](mailto:bbeaudet@pbwater.com)

#### **City of Boca Raton**

Chris Helfrich, Utility Director  
1401 Glades Road  
Boca Raton, FL 33431  
Phone: (561) 338-7301  
Email: [chelfrich@ci.boca-raton.fl.us](mailto:chelfrich@ci.boca-raton.fl.us)

#### **City of Riviera Beach Utility District**

Louis C. Aurigemma, Executive Director  
600 West Blue Heron Boulevard  
Riviera Beach, Florida 33404  
Phone: (561) 845-4185  
Email: [LAurigemma@RivieraBch.com](mailto:LAurigemma@RivieraBch.com)

#### **Glades Utility Authority**

Jim Stiles, Executive Director  
39800 Hooker Highway, PO Box 1720  
Belle Glade, FL 33430  
Phone: (561) 993-2602  
Email: [jstiles@pbwater.com](mailto:jstiles@pbwater.com)

### *VSA Client References*

#### **St. Lucie County, Florida**

Michael Brillhart, Business & Concurrency  
Manager  
2300 Virginia Avenue  
Fort Pierce, Florida 34982  
Phone: (772) 462-6406  
Email: [brillhartm@stlucieco.org](mailto:brillhartm@stlucieco.org)

#### **City of Visalia, California**

Nancy Loliva, Community Relations Director  
425 E. Oak Ave.  
Visalia, CA 93291  
Phone: (559) 713-4535  
Email: [NLoliva@ci.visalia.ca.us](mailto:NLoliva@ci.visalia.ca.us)



**City of Santa Maria, California**

Rick Sweet, Director of Utilities

2065 E. Main Street

Santa Maria, CA 93454

Phone: (805) 925-0951

Email: [rsweet@ci.santa-maria.ca.us](mailto:rsweet@ci.santa-maria.ca.us)

**City of Pismo Beach, California**

Shelly Higginbotham, Mayor

760 Mattie Road

Pismo Beach, CA 93449

Phone: (805) 235-6604

Email: [shigginbotham@pismoeach.org](mailto:shigginbotham@pismoeach.org)

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## *Proposed Scope of Services*

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We know the Village has an understanding of Federal and State lobbying. The Team will proceed in the following manner if chosen:

- Critically examine, and then improve upon, the Village's past advocacy efforts.
- Explore and recommend new areas of Federal and State advocacy not pursued in the past.
- Broaden efforts already initiated by the Village.

The Team will immediately study and assess the Village's priorities and community assets, and examine which needs and assets will create momentum and fit Federal and Florida trends for the best chance of Legislative and Executive Branch success. The Team will work with Village staff to evaluate how best to achieve the Village's long-term goals and examine several methods for securing Federal and Florida support for Village policies and projects.

Below is a detailed description of the services and strategies the Team proposes. Based on our experience, we know the most effective communication and advocacy strategies are developed with honest input from all parties involved. For that reason, we work hard on being flexible to the needs and concerns of the Village and look forward to developing a specific strategy as our relationship progresses that takes into account our extensive background representing local governments and the Village's Florida and Federal advocacy needs.

### **Provide research and timely written and oral information to the Village.**

Effective communication is critical to successful advocacy. The Team will work diligently to keep the Village informed and updated regarding Florida and Federal legislation, initiatives, funding opportunities, and news through a variety of different sources. While team leaders John Fumero and Greg Burns will always be available to the Village, the Team can arrange scheduled phone calls and produce written updates to ensure ongoing communication is taking place.

The Team will also prepare, with the assistance of Village staff for technical guidance, the following forms of research and information:

- Analyses of budget requests and forecasts for policies and programs of importance to the Village;
- Reports of, and testimonies from, relevant Committee hearings and markups;
- Memos on pertinent Federal and Florida initiatives or topics;
- Federal and Florida agency and departmental regulations, guidelines, directives, and other instruments of administrative policy;
- Grants and other funding opportunities for proposed Village projects;
- Technical reports and memoranda affecting Village operations and fiscal conditions;
- Copies of proposed legislation and associated reports;
- "White papers" and materials geared toward elected officials and their staffs that justify the Village's objectives in simple and straightforward language, providing the respective Legislative and the Executive Branches with the information they need to be successful on your behalf;
- Support or request letters for legislative sponsors to use with relevant committees or Florida and Federal agencies;
- Any necessary forms for appropriations or authorizations requests;

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- A briefing book for pertinent members of legislatures and legislative committee, the Executive Branch agencies, and their staffs, and
- Monthly itemized invoices for compensation related to services.

### **Monitor existing and proposed laws and regulations that affect the interests and priorities of the Village.**

The Team will closely monitor the progress of pertinent bills, relevant agency regulatory developments, and significant budget discussions and legislation to ensure that the Village's priorities are considered by the appropriate authorities at every opportunity. Success depends upon timely input from Members of the Legislatures and their staffs to the committees. Similarly, careful coordination must be maintained with Florida and Federal agencies that administer the programs to make sure the agency demonstrates its interest. The Team will ensure that conversations are made at the right time, that timely correspondence is sent, and that agency officials communicate with Capitol Hill and Tallahassee.

### **Proactively recommend and develop legislative positions for proposed laws and regulations that affect the interests and priorities of the Village.**

Working with the Village, and based on our knowledge of opportunities, the Team will develop a list of current or predicted legislation to either oppose or support on behalf of the Village, as well as funding targets, and essential Federal and Florida programs that must be protected. Once we have worked with Village staff to create a prioritized and action-oriented Federal and Florida Legislative Agenda, the Team will create a Legislative Briefing Book that can be distributed to the Village Council for approval. This book will be used as a guide for the aggressive advocacy provided on behalf of the Village of Wellington and will be updated as both the 2013 legislative cycle progresses.

In addition to the formal legislative agenda, the Team members will be available to discuss and research pertinent legislation as it develops. We will constantly monitor the introduction and progress of proposed laws and regulations and provide analysis on the potential effects for the Village. We will assist in developing the Village's stance and contact the relevant Legislators on the Village's behalf to ensure they are aware of the Village's position on significant legislation.

### **Propose and develop opportunities that will access funding at the policy making level.**

For nearly the past year, VSA have been describing to our clients how the practice of earmarking was likely to end or at least be severely curtailed. We have been planning for this eventuality for some time.

With our advance planning, the current earmark moratorium does not come as a shock, nor does it create a crisis. While ideally we would like to work to secure earmarks for clients, our immediate focus will remain on relevant policy issues, Federal agency programs and relationship development, and agency grant and programmatic funding, all of which can often have a bigger effect on a community than a simple Federal earmark.

For example, Mr. Burns recently worked with the City of Visalia, Calif., to secure a two-year extension of the Preferred Risk Policy (PRP) rate for residents who have Federal flood insurance through the National Flood Insurance Program. With more than 12,000 residents in the flood plain and PRP rates almost \$1,000 lower than regular flood insurance rates, the City's residents will save nearly \$18 million in flood insurance premiums over two years. While this example may not apply to the Village of Wellington's circumstances, it is one example of how a policy initiative can have a positive impact on the community.

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VSA will also work to expand our clients' interactions with Federal and State agencies, whether through traditional competitive grant programs or other initiatives. For example, Mr. Burns also recently worked with the City of Beaverton, Ore., to engage the U.S. Export/Import Bank and the Department of Commerce to set up a seminar for export businesses in the community. In this way, the City and its local businesses may gain the assistance of these Federal agencies as individual companies look to expand their exports or initiate exports to new markets. We also engaged the U.S. Interagency Council on the Homeless to assist the City so it can better address its challenges with youth homelessness. Finally, we worked with the Economic Development Administration to secure competitive grant funding for expanded programs at the City's Oregon Technology Business Center.

#### **Research and identify grant funding or other opportunities for funds.**

As Congressionally directed spending is on hold for the near future, more discretionary funding is left at the agency level to be awarded through competitive grants. That is why securing discretionary grant funding through Federal and Florida agencies and Executive Branch departments is becoming more important than ever. The Team will help the Village navigate the policy, budgetary, and legislative processes to select the appropriate grant programs and improve chances to secure grant funding. The Team will provide due diligence, including discussing funding requirements and qualifying the opportunity with the issuing agency. The Team is prepared to provide appropriate counsel and to engage in Congressional outreach such as working with Congressional offices to submit letters of support for the Village's grant applications.

VSA's continual contact and close working relationships with Federal and Florida agencies allow us to glean intelligence in advance of public announcements. This knowledge will allow us to provide the Village with timely information on research and infrastructure funding opportunities. VSA will also provide support to the Village on responses to Federal and Florida public announcements. The Team has extensive experience supporting winning competitive grant proposals and often serves clients in enhancing grant submissions. Depending on services required, we have the team in place to be able to help you improve your submission, realign it more competitively for the win, add team players, edit, and submit.

#### **Arrange meetings for Village elected officials and personnel with legislative members and staff. Provide logistical support and attend those meetings when necessary.**

The Village must meet with the right Federal and State officials and it must deliver the right message. The Team has an excellent working relationship with the offices of the Florida delegation in both Washington and Tallahassee given our current and past representation of other government entities throughout the state on broad issues.

A member of the Team will accompany the Village during all meetings with legislative members, staff, and agency officials to provide background information and assist as needed. We will work with Village staff in advance to ensure that those attending the meeting are knowledgeable on the topics being discussed and equipped with documents to supplement the conversation. We understand that financial limitations restrict Village staff members and elected officials from traveling to Washington and Tallahassee as often as may be desired. In recognition of that, we will work to make sure that all trips are structured to most effectively take advantage of your time.



For the same reason, we will continue to engage in regular meetings with Congressional and Florida leadership and their respective staffs on behalf of the Village in your absence. The Team will stay in continuous contact with these officials by phone and email. The Team will advance already existing political relationships and establish new ones. We will assist in correspondence between your legislative delegations and other relevant members of the respective legislatures to ensure your viewpoint and suggestions are heard regarding legislation that affects the interests of the Village. The Team will focus its collective efforts intensely on the legislative leaders that will best enable us to accomplish your goals.

#### **Attend Village meetings as requested by the Village to report on activities.**

The Team begins all client relationships with a site visit to assess the Village's strengths, assets, needs, and long-term vision, with the goals of creating a Florida and Federal strategy to ensure success during the legislative sessions, advance existing projects, and advocate the Village's long-term vision within both the Legislative and the Executive Branches.

Throughout the year, the Team will maintain a visible presence with the Village and staff, as we are committed to traveling to the Village on a regular basis to brief officials on events in Washington and Tallahassee affecting the Village's Florida and Federal agenda.

#### **Engage in advocacy to promote the Village's position on priority issues, including appropriate interest groups, the Florida League of Cities, U.S. Conference of Mayors, and the National League of Cities.**

The Team regularly and actively participates in meetings of Washington and Tallahassee representatives coordinated by the U.S. Conference of Mayors, National League of Cities, Florida League of Cities, National Association of Counties, Florida Association of Counties, and the National Governors Association. We are prepared to play an intermediary role between the Village and relevant national organizations by articulating issues and viewpoints important to the Village and disseminating pertinent information and initiatives back to Village staff.

#### **Communication**

We ensure that the Team possess the skills and experience to match the needs of the client, actively supported by others within our firms. This approach will give the Village a complete understanding of the work we do on your behalf. It is also important to note, however, that all of our firms' resources may be drawn upon at any time. VSA and SFF truly foster a collaborative atmosphere, and have backgrounds that give the Village a broad base of experience from which to draw.

Greg Burns will be the primary point of contact for the Village for Federal affairs and John Fumero for State affairs. Both are available by phone and email, including outside of normal business hours.

Based on our experience, we anticipate we will spend a significant percentage of time communicating with the Village in order to provide updates and respond to questions, while communicating the Village's agenda to key Federal and Florida officials. The Team will organize scheduled calls with the Village in order to ensure that we have a coordinated and active legislative strategy. We also will produce comprehensive status reports and summaries of our work on a regular basis.

In addition, the Team can provide legislative tracking status reports and other materials. The information can be updated, showing the status of legislative and regulatory initiatives, charting their progress through the legislative process, and outlining next steps to take.

While many communities have similar needs and objectives, our specific approach and methodology varies by client. The Team prides itself on being able to adapt to the different methods and structure each client finds most effective. Whatever methods you choose, all the content and information we create will be for the Village and will not be generic. It is our job to know what interests you and to ensure you have that information, not pass along irrelevant information.

## *Lobbying Registrations*

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Pursuant to Sections 11.045 – 11.062 and 112.3215, Florida Statutes, SFF is currently registered to lobby with Florida's Legislative and Executive Branches and will update its registration to reflect the Village as a principal if selected.

All VSA staff members identified in this proposal are registered Federal lobbyists. Van Scoyoc Associates is registered with the Clerk of the House of Representatives by identification number 32802 and with the Secretary of the Senate by identification number 39837.

## *Proposed Fee*

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Sundstrom, Friedman & Fumero and Van Scoyoc Associates structure our relationships with our clients in a way that ensures complete and open communication. We charge a flat fee for services on a monthly retainer basis. We do not charge by the hour, so that communications are open and not hindered, and our client knows exactly what our services are going to cost. We base our retainer rates on the number of principals and staff devoted to a client and the expected scope of work.

For the Village of Wellington, SFF and VSA propose full and complete local, State, and Federal representation services for a monthly retainer of \$12,500 with the addition of reasonable costs for directly related business expenses and travel, which we would offer to cap at \$5,000 over the course of a 12-month contract. All services/activities outlined in the proposal are included in the monthly retainer.

Payments are due monthly and generally in advance. Sums owed by the Village of Wellington to the SFF and VSA Team shall accrue interest at a rate of 1.5 percent per month if unpaid after ninety (90) days. The Village will understand that these payments shall not be made with Federally appropriated funds and that we may be required to register for work performed on behalf of the Village under the terms of the Lobbying Disclosure Act of 1995, as amended (2 USC §1601 et seq.) and any subsequent laws or regulations.