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**RFP# CMO/240646**  
**State Legislative Lobbyist Services**



**THE ADVOCACY  
PARTNERS**

204 South Monroe Street  
Tallahassee, Florida 32301  
850-222-8900  
[www.tapfla.com](http://www.tapfla.com)

Contact: Stephen Shiver | [stephen@tapfla.com](mailto:stephen@tapfla.com)

## Transmittal Letter

May 29, 2024

Eileen Marquez, Senior Buyer

[emarquez@ocalafl.gov](mailto:emarquez@ocalafl.gov)

352-629-8362

Dear Ms. Marquez,

On behalf of the entire team at The Advocacy Group at Cardenas Partners, DBA The Advocacy Partners, it has been an honor to serve the Council and the people of the City of Ocala for the past fifteen years. It is our hope that our relationship is one in which the City has found value, and we look forward to the prospect of continuing our representation in the years to come. To that end, we are enclosing a comprehensive response to the City's Request for Proposals.

### **RFP# CMO/240646 State Legislative Lobbyist Services**

1. The Advocacy Group at Cardenas Partners DBA The Advocacy Partners  
204 South Monroe Street | Tallahassee, FL 32301  
850-222-8900  
Years in business: 21  
Staff Size: 8
2. Team members overseeing this project and authorized to make representations for the firm, both in writing and oral presentation:

Stephen Shiver, Co-Founding Partner  
204 South Monroe Street  
Tallahassee, FL 32301  
Cell: 850-251-0844

Sarah Suskey, Partner  
204 South Monroe Street  
Tallahassee, FL 32301  
Cell: 850-345-9392

3. We acknowledge that our firm has received, read, and understands all procedures and criteria associated with the submittal requirements, and understands that all terms and conditions contained herein may be incorporated into the resulting contract.
4. As the City's current contract lobbyist, The Advocacy Partners (TAP) is intimately familiar with the scope of work to be provided to the City as described in the RFP. Specifically, related to Section 2.2, our team is equipped to carry out all objectives of this proposal. The request for proposal process provides a fantastic opportunity to review the scope of services to be provided, should we earn the honor of continuing our advocacy work, as well as what new priorities the City might envision heading into the new term. As part of the advocacy services to be provided, TAP understands that as the City's contract lobbyist we are to meet with elected officials and City staff to coordinate legislative and executive priorities, provide information on relevant funding opportunities, provide weekly bill reports prior to and during yearly legislative session and recommend actions throughout the course of the year. We will also be responsible for identifying grant opportunities and securing legislative appropriations, providing personalized updates on bills

and amendments throughout the legislative process and connecting with industry experts to facilitate greater understanding of legislation as needed. We will attend of a minimum of four meetings in the City of Ocala (as required by the City), monitor of state agencies and actions taken by the Division of Administrative Hearings, identify pertinent hearings before the legislature, meeting with members of the legislature and testify before Legislative Committees as appropriate. Additionally, we will provide interpersonal contacts to help the City achieve their goals, will not provide contractual services to local competing interests, and any provide for additional needs the City might request. Furthermore, we have the ability to continue to contract federal lobbying efforts for the City at a negotiated rate, as we have for several years.

We are genuinely excited about the opportunity to earn the privilege of serving the City Council and the good people of Ocala yet again. We believe this is a seminal moment for Ocala, and we think we are positioned to continue to help the City meet its long-term goals.

I can say without equivocation that our entire firm is dedicated to the City's success and personally, it has been a joy to watch the City grow and thrive under the Council's leadership. We would consider it a great privilege to continue our service going forward.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Stephen Shiver', with a stylized, looping flourish extending to the right.

Stephen Shiver  
Co-Founding Partner

**TAB 1 | FIRM PROFILE, QUALIFICATIONS, AND AVAILABILITY**

## **(1) Firm Profile**

### (a) Firm Details/Proposer Information

The Advocacy Partners  
204 South Monroe Street  
Tallahassee, FL 32301  
850-222-8900  
Email: [Stephen@tapfla.com](mailto:Stephen@tapfla.com)  
FEIN: 27-0393975

The Advocacy Partners (TAP) is a bipartisan, Florida focused full-service government relations firm located in Tallahassee, Florida. Our firm was founded in 2003 at the law firm of Tew Cardenas LLP and has been in existence for 21 years. Al Cardenas founded our firm, while partners Slater Bayliss and Stephen Shiver each joined the practice in 2004. In July 2009, the partners acquired the equity interest held in it by Tew Cardenas LLP and was reincorporated as a standalone Limited Liability Company in 2009 under the name The Advocacy Group at Cardenas Partners. Following the retirement of our founding partner, Al Cardenas, the firm shifted our DBA to The Advocacy Partners. Our firm employs six professional lobbyists and two support staff team member. Of our 8-member team, we propose to continue our relationship with lead lobbyists Stephen Shiver and Sarah Suskey employed on a full-time basis. Other team members include Slater Bayliss, Chris Chaney, Jeff Woodburn, Steve Schale, as well as Alex Poitras and Isabelle Kelly who will assist the lead lobbyists on an as-needed basis for the City.

At The Advocacy Partners, we are state-level advocates for some of the most recognizable brands in the world. As one of the few truly bipartisan teams lobbying in Tallahassee, our approach is founded on the principles of integrity, professionalism, and pragmatism. It's from this foundation that we offer our public and private sector clients a range of services in the legislative, executive, and regulatory arenas.

The advocates on our team represent a combined total of 125 years of work in Tallahassee, with experience working in all three sides of public life: within government, political campaigns, and now in the practice of government and public affairs. We believe this sets us apart from others because our team understands from real world experiences the political and policy choices facing elected officials. When you hire us, you hire our whole firm. While each client has a lead they can reach at any time, we do not silo our practice, meaning each client has access to our entire team – and years of combined experience in Tallahassee that comes with it.

We represent nearly 100 clients across a broad range of subject matters and needs, ranging from Fortune 500 companies such as Anheuser Busch, Duke Energy, IBM, JetBlue and Marriott, to a range of not-for-profit organizations including the Environmental Defense Fund and No Kid Hungry. TAP is unique in that we commit 100% of our effort to every client we represent; and believe that the public entities we have the pleasure of advocating on behalf of deserve the same high quality advocacy representation as Fortune 500 companies. We have been fortunate to provide this type of quality representation to the City of Ocala since 2009, Okaloosa County since 2010, the Port of Tampa Bay since 2013, and most recently Lee County in the aftermath of Hurricane Ian. We have been purposeful in limiting our number of governmental clients,

so the clients we do represent in this space receive our complete focus. When we advocate for our local government clients, we never want to be in a position of picking and choosing what we will fight for – and by keeping this part of our practice tight, we can put all of our resources behind ensuring our local government clients are successful.

#### (b) Joint Venture | Consortium

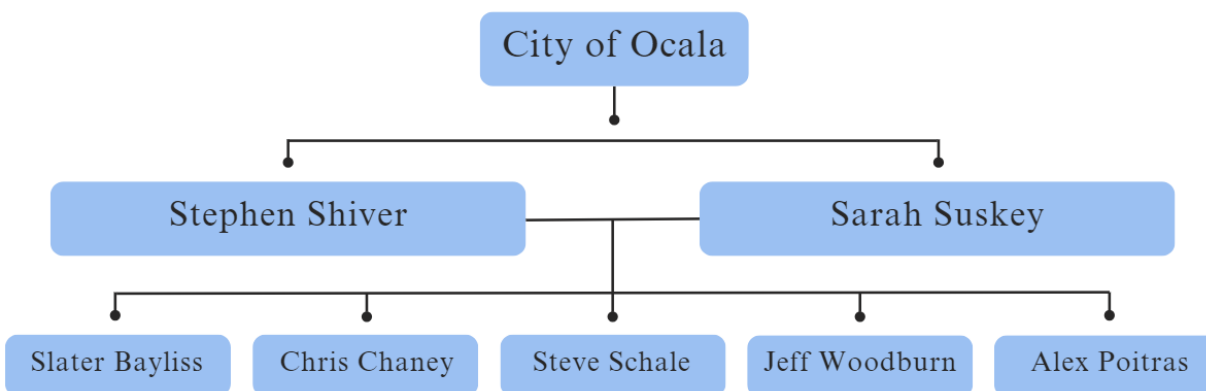
We do not propose a joint venture or consortium, The Advocacy Partners will serve as the principal lobbying firm.

#### (c) Disciplinary Action

Neither the firm nor its members have been the subject of any disciplinary action with state regulatory bodies or professional organizations in the past five years.

### **(2) Partner, Supervisory, and Staff Qualifications and Experience**

#### (a) Organizational Chart



In order to not be redundant, please see below for a detailed description of assignments related to this engagement.

#### (b) Key Personnel Roles and Responsibilities | Qualifications & Experience/Staffing Plan

Collectively, we would designate Stephen Shiver and Sarah Suskey to lead the team in representation of the City of Ocala. Mr. Shiver and Mrs. Suskey will serve as lead liaisons and primary contact with the City; however, you can be assured that all resources of TAP will be utilized to meet your priorities.

TAP truly takes a team approach to managing the workload among the personnel on our staff, constantly analyzing and assessing the task at hand and assigning the member of the firm with the greatest strength in each respective area to see each matter through. Our team meets weekly to make such assessments and we are committed to ensuring that the priorities of the City of Ocala are carried out to the best of our abilities as a team and in the timeliest manner possible. Throughout our representation of the City of Ocala, every member of our firm will be made available to engage policy makers or staff on issues relevant to you.

Specifically, we would not limit the City of Ocala's access to any particular member of our team but rather would make available all resources needed to successfully complete the effort at hand. Our team's professional make-up is strategic in nature, with each member of our advocacy practice bringing a different set of skills and abilities to bear for our clients.

Our firm prides itself on the strong relationships we have with Governor DeSantis and his executive office senior management, as well as agency heads and their senior management teams. We also maintain solid relationships with Senate President-Designate Albritton and House Speaker-Designate Perez, and their respective senior staff. Specific to the City, our firm has been an active participant with the Marion County Delegation, attending hearings with City officials, assisting in the communications with Delegation staff and the City, and helping craft legislative priorities and messages that are presented to the Delegation. An effective local advocacy strategy begins with a solid foundation of understanding and familiarity with the area's local elected officials. As such, our firm has made it a priority to become an indelible participant with the Marion County Delegation, its members, personnel, and procedures.

While we maintain these strong relationships, we pride ourselves on providing effective advocacy for clients before elected officials and legislative delegations statewide. This statewide approach is particularly important leading up to the 2025 Legislative Session where the Legislature will see many new members following the election year. This creates a tremendous opportunity for the City to educate new members on the opportunities and unique issues facing the City. Our approach would continue to build upon our collective and focused efforts to educate legislators and policymakers inside and outside of the Central Florida area on the positive impacts the City has upon the state's economy. It is our belief that continuing to retain a firm like ours with a proven track record of collaboration and success, along with a statewide political network, will lead to continued successes for the City.

Related to the specific questions in the solicitation, while Florida Statute requires lobbying firms to submit quarterly compensation reporting, which our firm carefully complies with, there is no requirement for continuing education, as requested in (2)(b)4. Additionally, the roles of each individual member are discussed above and in the staffing plan, which follows this section.

The resumes of all members of our team follow this section of our proposal. We believe they illustrate the broad range of talent and resources that TAP possesses.



## **Slater Bayliss | Partner**

[slater@tapfla.com](mailto:slater@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Slater is a co-founder of The Advocacy Partners and a veteran within Florida's arena of politics and public policy. During his two decades in the industry, he has earned a reputation as a contemplative strategist as well as a tenacious and effective advocate. Slater has been recognized by *INFLUENCE* magazine as one of the most influential people in Florida politics and was recently named one of the top 10 lobbyists in Florida by The Florida Standard.

Most recently, he was appointed by U.S. Senator Marco Rubio to his Military Service Academy Nominating Commission and appointed by Governor Ron DeSantis to The Florida Prepaid College Board.

Previously, he served as personal assistant to Governor Bush and as deputy policy director on Bush's gubernatorial campaign. Following his time in the Governor's office he coordinated the only citizen's initiative campaign in Florida history to successfully repeal a provision from the state constitution.

Slater earned a Bachelor's Degree in Political Science and Communications from the University of Iowa. He later earned a Master's Degree in Applied American Policy and Politics from Florida State University. He currently serves as an Adjunct professor in Florida State University's College of Social Sciences and Public Policy.

Slater was appointed by two Governors to the Board of Directors of the Florida Sports Foundation, serving as the Chair of the Florida Sports Charitable Foundation. Additionally, he has served as Chair of the Board of Directors for Tree House of Tallahassee, an emergency shelter where children who are victims of domestic abuse are given shelter and comfort. He has raised funds for the U.S. Central Command Memorial Fund and the Florida Hurricane Disaster Relief Fund.

He and his wife, Sara, met as undergraduates and now reside in Tallahassee. They are the proud parents of 3 children.





**Chris Chaney | Partner**

[chris@tapfla.com](mailto:chris@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Chris is a well-respected veteran of state government, with a specialty in health care policy. He served as Legislative Affairs Director at Florida's Agency for Health Care Administration (AHCA), the chief lobbyist on all policy and appropriations issues before the legislature, including the licensure and regulation of all healthcare facilities in Florida, as well as operation of Florida's Medicaid program. Chris was responsible for providing support services to Agency divisions relative to drafting legislation, assisting in the development of the Agency legislative package, coordinating briefings, aiding members of the legislature and staff, and promoting the Agency's agenda throughout the legislative process. During his time as Director, he worked to ensure the passage of several major reform initiatives, including the revolutionary Statewide Medicaid Managed Care Program.

Chris was tapped to serve as the acting Chief of Staff at AHCA during his tenure.

Prior to his time at AHCA, Chris was a member of then-Governor-Elect Rick Scott's Health and Human Services Transition Team. He was responsible for identifying talent for executive level service at the Agency for Health Care Administration, the Department of Health, the Department of Elder Affairs, and the Agency for Persons with Disabilities.

Leading up to the Transition, Chris was a member of the political department of Rick Scott's Campaign for Governor. He focused on targeted voter turnout strategy and Election Day operations.

Chris resides in Tallahassee with his wife Ashley and their two daughters, Penelope and Charlie.



## **Alex Poitras | Director of Operations**

[alex@tapfla.com](mailto:alex@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Alex Poitras joined The Advocacy Partners in January 2023 as their Director of Operations. She manages the firm's day-to-day operations while coordinating legislative priorities and research.

She has been involved in the process since 2017, working alongside members of both political parties. Before joining the team, Alex was hired as a Legislative Assistant at a local firm ahead of the 2022 Legislative Session, but she was quickly promoted to a full-time position supporting their 6-member lobbying team.

Although she was born in Orlando, Florida she grew up along the East Coast. She eventually would return to Florida where she attended Florida State University, double majoring in Political Science and History. While studying for her undergraduate degree, she had the pleasure of interning with Representative Frank White (2017) where she monitored and provided updates to his Legislative Aide.

During the 2020 Session Alex worked for the Florida House - Office of the Clerk serving as Supervisor of the Page and Messenger Program. The following year she would accept an internship for the 2021 Session with House Minority Leader *pro tempore* Kamia Brown where she composed press releases, talking points, and fact sheets for Representative Brown's priority bills.

In May 2023, she completed her Master of Public Administration earning the Exemplar Capstone Award for her research on the *Impact of Rising Sea Levels on Miami-Dade Counties' Wastewater Infrastructure*.

In her free time Alex enjoys spending time outdoors. In 2019 she spent 10-weeks traveling cross-country exploring various National Parks. She resides in Tallahassee with her fiancé Zach.



**Steve Schale | Associate**

[steve@tapfla.com](mailto:steve@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Steve has 27 years of experience working in and around the Florida Legislature. He was Communications Director for the House Democratic Caucus and was a longtime aide to former House Democratic Leader Doug Wiles. From 2005-2008, Steve ran the Florida Democratic Party's House Democratic Caucus, a period that still stands as the most successful run for Florida Democrats in 50 years.

Widely quoted in national media as a top expert on Florida, the St. Petersburg Times has called him "one of the savviest and most effective political strategists Florida Democrats have seen in ages." In 2008, he was named one of Florida's "100 Movers and Shakers" by Florida International Magazine, one of the most influential Democrats in Florida by Politics Magazine in 2009 and 2013, the most influential Florida Democratic strategist in Florida by the Tampa Bay Times in 2012, and one of the top 100 Florida influencers in both 2016 and 2018 by Florida Influence Magazine.

In 2008, Steve directed the Obama/Biden campaign in Florida, returning in 2012 as a Senior Advisor to the re-election, and in 2015, Steve was a Senior Advisor and national spokesperson for the Draft Presidential campaign for Vice President Joe Biden, and in 2020, ran President Biden's national SuperPAC, Unite the Country

Outside of politics, Steve serves on the board of the Epilepsy Foundation of Florida, Awesome Tallahassee, and the American Council of Young Political Leaders, and is a member of Leadership Florida, Class 31. Steve is a graduate of the University of the South in Sewanee, Tennessee, where he received degrees in political science and history.. Steve also regularly travels overseas as part of exchange programs to mentor and encourage young political leaders, and speak about life and politics in America.



**Stephen Shiver, Jr. | Partner**

[stephen@tapfla.com](mailto:stephen@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301

850.222.8900

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

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

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

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

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

Stephen received his Bachelor's Degree in Business and English from Florida State University.



## **Sarah Busk Suskey | Partner**

[sarah@tapfla.com](mailto:sarah@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Sarah Busk Suskey is a Partner in the government affairs practice at The Advocacy Partners with over 15 years of experience working in Florida politics. She has extensive experience working with local governments, as well as multiple statewide associations and businesses large and small to formulate and execute an executive and legislative plan. Additionally, she provides clients with strategic political advice designed to maximize resources and build relationships.

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

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

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

In 2018, Sarah served as a consultant to Governor DeSantis' Inaugural Committee, as she did in 2011 for Governor Scott. She holds a Bachelor's Degree in Political Science from Florida State University, has completed RNC Campaign Finance College and was an Alternate Delegate to the 2004 Republican National Convention.



**Jeff Woodburn | Associate**

[jeff@tapfla.com](mailto:jeff@tapfla.com)

204 South Monroe Street, Tallahassee, FL 32301  
850.222.8900

Jeff Woodburn joined The Advocacy Partners after nearly ten years of experience at the highest levels of state government. Prior to becoming an Advocacy Partner, Jeff served as the policy director for Governor Ron DeSantis' successful gubernatorial campaign, where he was responsible for developing the campaign policy platform and served on the campaign's senior leadership team.

Jeff also served as special counsel and policy advisor to Florida's Chief Financial Officer Jimmy Patronis. Prior to that, he was the executive director for the 2017-18 Florida Constitution Revision Commission, where he was responsible for the day-to-day operations, legal review, and administration of the most successful Constitution Revision Commission in Florida's history resulting in seven amendments to Florida's constitution passing in the 2018 general election.

In addition, Jeff served in various high-level roles for Governor Rick Scott, including as the Governor's policy director and deputy chief of staff. He was responsible for developing the Governor's policy objectives, briefing Governor Scott on all legislation, managing the various business and insurance coalitions during legislative sessions, and serving as co-director of the Office of Policy and Budget. He also oversaw various state agencies including the Departments of Business and Professional Regulation, Corrections, Juvenile Justice, Lottery, Revenue, the State Board of Administration, the Offices of Insurance Regulation and Financial Regulation, the Division of Bond Finance, the Florida Retirement System, Citizens Insurance, VISIT FLORIDA, and the Florida Housing Finance Corporation.

Jeff also served as Deputy Secretary of Business Regulation for the Department of Business and Professional Regulation where he oversaw Florida's regulation of alcohol, tobacco, gaming, hotels, restaurants, condominiums, and timeshares and as deputy policy director for Governor Scott. Prior to his extensive executive branch experience, Jeff served as an attorney for the Florida House of Representatives and as a legal intern for the Florida Senate.

Jeff received his bachelor's degree from the University of Florida and his law degree from the Florida Coastal School of Law.

### (c) Commitment to this Engagement

As the City's current lobbyists of record, we feel that our team is uniquely positioned to continue to provide effective representation in Tallahassee in a seamless and comprehensive manner. Specifically, over the course of our engagement, alongside the talented professional staff of the City, we have constantly shifted and re-worked the City's advocacy approach to accommodate various political undercurrents in a seamless manner in an effort to successfully meet the City's ever-evolving legislative goals. We believe our team's experience and nuanced understanding of the City's priorities and approach to government relations distinguishes us from other respondents to serve the City going forward. Specifically, the collective record of success we have achieved alongside the City proves that our firm is well positioned to continue to provide a focused approach to your state government consulting needs.

It should be noted that in our experience it is impossible to forecast and project a workload for the entire firm's clientele from year to year. For this reason, TAP is sensitive to the number of clients we have in a given year and will not over commit our firm resources to the detriment of any client, including the City of Ocala. Our confidentiality agreements with many of our clients would prevent us from providing a full list of the activities or workload we are engaged in over the course of the year; however, TAP has committed two of the firm's partners to serve as the lead for the City to monitor the fluidity of firm resources available to the City. Stephen Shiver and Sarah Suskey are available at all times and remain in regular contact with City staff. This is meant to ensure that the City receives maximum exposure to the firm's principals. Mr. Shiver and Mrs. Suskey are committed to the City's success, and you can be sure that they will devote as much time as is necessary to achieve the City's objectives.

### (d) Summary of Litigation

The Advocacy Partners has not been subject to any litigation in the last three (3) years.

### (e) Insurance

Our firm carries the standard insurance coverage required by the City of Ocala and has the ability to augment coverage, as necessary. Please see Attachment A for our Certificate of Insurance.

## **(3) References and Firm Experience**

### (a) Similar Engagements/References

The Advocacy Partners (TAP) represents the City of Ocala, Okaloosa County, Lee County, and Port Tampa Bay. Each of our local government clients has very distinct needs based on their region and in the case of the Port, their specific governmental purpose. Our firm represents a limited number of local government clients, however, that representation has spanned over a decade for Okaloosa County, the City of Ocala, and Port Tampa Bay. We feel that the fact that each has extended and renewed our contracts for this length of time is indicative of the trust and confidence that each client has in our firm. We have a deep level of understanding of the needs of local governments and yet, we are not spread so thin as to have to make

choices between their priorities when going to decision-makers to advocate on their behalf. To reiterate this work:

### **City of Ocala, Florida**

Annual Budget Amount: \$55,000.00 per year

Initial Contract Start: January 2009

Current Contract Term: September 12, 2021-September 11, 2024

Team Members: Stephen Shiver, Sarah Suskey

### **Summary of Work**

TAP has been fortunate to represent the City of Ocala, a community focused on economic development and job growth, since 2009. During that time, our work has been focused on a wide range of issues, including but not limited to protection of home rule, economic development, transportation, natural resources protection, local government revenues, parks and recreation, public safety, growth management, utilities, housing, and insurance, just to name a few.

Over the course of TAP's work for the City of Ocala, the firm has consistently served as an envoy to state officials on the City's economic development initiatives, including working alongside Enterprise Florida and the state Department of Commerce on a myriad of economic development projects. Additionally, TAP has worked to fight multiple attempts to move Municipal Owned Utilities underneath the oversight of the Public Service Commission, established productive dialogues with senior officials within the Department of Transportation, assisted with regulatory hurdles within the Department of Environmental Protection related to the Pine Oak Golf Course, ushered passage of a Local Bill creating the downtown entertainment district, allowing the City to increase the number of concerts and community events held in the downtown area and worked to secure funding assistance for the City of Ocala Multimodal Trail and Linear Park – Florida Northern Railroad Relocation and Railway Improvement Project.

This is in addition to the appropriations successes, which includes securing funding for an extension to SW 44<sup>th</sup> Avenue, which will relieve traffic on I-75 and provide an alternate evacuation route in case of an emergency. Also, as a community that sits on one of our state's first magnitude springs, water resources have been a significant priority for the City and TAP has worked to secure funding for multiple water related projects over the years.

Specific appropriations TAP has recently worked to secured on behalf of the City include:

- |  |                            |
|--|----------------------------|
| • Ocala Force Main Construction                | \$1,000,000 (2-year total) |
| • Silver Springs Stormwater Nutrient Reduction | \$600,000                  |
| • Ocala SW 44th Avenue Extension               | \$9,000,000 (2-year total) |
| • Ocala Exfiltration                           | \$2,000,000 (4-year total) |
| • Ocala Lower Floridan Conversion              | \$4,296,775 (4-year total) |

Contact Person: Pete Lee, City Manager

Phone: 352.629.2489

Email: [plee@ocalafl.org](mailto:plee@ocalafl.org)



## **Okaloosa County, Florida**

Annual Budget Amount: \$55,000.00 per year

Initial Contract Start: 2010

Current Contract Term: July 7, 2022 – June 30, 2025 + Two 1 year renewals

Team Members: Sarah Suskey, Slater Bayliss

### **Summary of Work**

TAP has represented Okaloosa County in Tallahassee since 2010, providing representation before both the legislative and executive branches of Florida government. TAP takes particular pride in the working relationship we have established with the County and over the course of our engagement, we feel that we have become adept at assisting the County on an increasing array of issues. Over the course of our relationship, TAP has worked with the Legislature and the Governor's Office to secure nearly \$30 million in state appropriations for the County, including consistent funding for the County's Mental Health Diversion program and numerous Water Quality and Transportation projects. In addition to the appropriations successes, TAP assists the County with advice and strategy related to the annual legislative priorities, facilitates Okaloosa County Day during the Legislative Session, and organizes other legislative visits throughout the year. Additionally, our firm has been an active participant with the Okaloosa County Delegation through the attendance of hearings with County officials, assisting in the communication between the legislative delegation staff and the County, and helping craft legislative priorities and messages that are presented to the delegation. We also engage in advocacy before the Governor's Office and multiple state agencies.

Over the course of our representation on behalf of the County, our role and level of engagement has matured, and our firm has been called on to work on a broad array of issues. TAP has successfully advocated for the extension of the County's ability to use a portion of Tourist Development Tax dollars to fund certain public safety expenditures, staving off a \$11.6 million hit to the County's general fund. Additionally, TAP worked to ensure that the County be included in the Governor's emergency order related to Hurricane Sally, in order to be properly positioned to receive FEMA funding and assisted with expediting wetland permitting processes under the Florida Department of Environmental Protection. In years past, TAP has been successful in adding Okaloosa County to the Forensic Hospital Diversion Program, staved off multiple attempts to dissolve the Mid-Bay Bridge Authority, assisted in securing a grant through the Florida Department of Commerce Defense Reinvestment Grant Program and worked with legislators and the Department of Transportation to address traffic congestion on Hwy 85 in Crestview. The latter currently has multiple projects in the Work Program, including a bypass around the City of Crestview, which incorporates a new interchange at I-10 and Antioch Road.

Recently, appropriations TAP has worked to secure on behalf of Okaloosa County include:

- |   |                          |
|---|--------------------------|
| • Okaloosa Shoal River Ranch Water Reclamation Facility | \$7,000,000              |
| • Okaloosa County Special Needs Ball Field and Park     | \$1,250,000              |
| • Okaloosa County - West Highway 98 Collector Road      | \$375,000                |
| • Okaloosa Walton Mental Health Pilot                   | \$1,375,000 (4 yr total) |
| • Niceville Area Multi-Purpose Pathway                  | \$1,500,000              |
| • Okaloosa – CR 2 Road Safety and Bridge Upgrades       | \$3,000,000              |
| • Okaloosa County US 98 Bridge-to-Bridge Multi-Use Path | \$1,500,000              |

• US 90 Intersection Improvements at Jericho Road	\$1,000,000
• Cinco Bayou-Glenwood Park Water Quality Improvement	\$300,000
• Okaloosa County Overbrook Area Flooding	\$750,000
• Okaloosa Florosa Potable Water Elevated Storage Tank	\$1,500,000
• Okaloosa County Agriculture Center	\$854,100
• City of Crestview Streetscape Renovation	\$1,000,000
• Okaloosa County Live Oak Church Road Bridge	\$1,500,000
• Okaloosa County Lloyd Street Mayflower Stormwater	\$1,500,000

Contact Person: Carolyn Ketchel, Commissioner

Phone: 850.689.5050

Email: [cketchel@myokaloosa.com](mailto:cketchel@myokaloosa.com)

### **Port Tampa Bay, Tampa Florida**

Annual Budget Amount: \$60,000.00 per year

Initial Contract Start: 2013

Current Contract Term: September 10, 2022 – September 9, 2025

Team Members: Slater Bayliss, Steve Schale, & Stephen Shiver

### **Summary of Work**

Since 2013, we have represented Port Tampa Bay leadership to advance multiple positive policy initiatives, secure appropriations, including \$12 million in funding for new gantry cranes to be used at the Port. In addition, while not appropriations specific, our firm took a lead role with Port Tampa Bay to protect the local governance of ports in a key fight to usurp the home rule authority of local counties and cities in the governance of ports. We worked specifically so that ports could maintain their own governance of port traffic and port development. We have also worked with the Port to maintain local control over issues such as fuel reserves, as well as helped the Port build a strategy to maximize our potential to receive federal infrastructure dollars that will come to the state for ports.

Our successes on behalf of Port Tampa Bay include:

- Securing \$7.65 million in funding for Berth 218, a new 475-foot public berth for cement, aggregate and other bulk construction cargo.
- Securing state funding, outside of the FDOT budget, for new gantry cranes to be used at the Port to support their efforts to become one of the leading container ports in the United States.
- Taking a lead role with Port Tampa Bay to protect the local governance of ports in a key fight to usurp the Home Rule authority of local counties and cities in governance of ports. Because this change would impact many communities, we worked to strengthen the coalition of communities impacted.
- Helping build a bipartisan regional coalition to support the Port's efforts to maximize drawing down federal infrastructure funding that will flow through the state.
- Engaging to help stop changes to state retirement would have limited the option to offer a defined benefit plan to potential new hires.

- Working to protect the Port's governing responsibility over strategic fuel reserves, and energy infrastructure projects.

Contact Person: Paul Anderson, President & CEO

Phone: 813.905.7678

Email: [panderson@tampaport.com](mailto:panderson@tampaport.com)

### **Lee County Florida**

Annual Budget Amount: \$90,000.00 per year

Initial Contract Start: 2022

Current Contract Term: December 1, 2022, through No End Date

Team Members: Chris Chaney, Sarah Suskey

### **Summary of Work**

In the wake of Hurricane Ian, the worst natural disaster on record for Southwest Florida, the Lee County Board of County Commissioners turned to our firm to assist them with their State government priorities in Tallahassee. Our firm was retained by the Lee County Board of County Commissioners at the end of 2022, and in our first year of representation, our team helped secure over \$80M in direct member project appropriations. Additionally, our team has supported local government grant funding opportunities on behalf of the Lee County totaling over \$700M. Each local government grant funding opportunity was passed by the legislature and approved by the Governor. Our approach to help secure this funding was to work closely with Lee County Commissioners, county staff, and the Lee County Legislative Delegation to identify areas of critical and immediate need. We then provided strategic assistance to county staff while they composed appropriations projects forms and made sure all deadlines were met throughout that process. Our team then worked with the Chair's and staff of each respective chamber's appropriations subcommittees of jurisdiction, Chair's and staff each respective full appropriations committee, and the Speaker of the House and Senate President to make sure everyone understood the challenges being faced by Lee County, and our thoughts on state-based solutions. We also spent a lot of time with staff in Governor DeSantis' Executive Office and the Governor's Office of Policy and Budget to ensure they were clear on the County's priorities, and why they were so critical to the recovery efforts. On the implantation side, our firm worked to ensure open lines of communication between leadership of the funding Agencies and Departments (Department of Transportation, Department of Commerce, and Department of Emergency Management, Department of Environmental Protection, etc.) to make sure Lee County was able to access as much of these funds as possible, and to make sure that coming to terms with the funding agencies went as smoothly as possible.

Contact Person: Glenn Salyer, Assistant County Manager

Phone: 239.533.2221

Email: [GSalyer@leegov.com](mailto:GSalyer@leegov.com)

### **(b) References**

We are proud of our accomplishments on behalf of all of our clients, including the local government entities we are fortunate to represent. We gladly give permission and would encourage the City to reach out to all of the contacts listed above.

In addition, we would submit the following three Non-Governmental References:

Associated Industries of Florida

Contact: Brewster Bevis, President and CEO  
Email: [bbevis@aif.com](mailto:bbevis@aif.com)  
Phone: 850.445.2363

Advantage Capital

Contact: Tony Toups, Principal  
Email: [ttoups@advantagecap.com](mailto:ttoups@advantagecap.com)  
Phone: 504.495.6412

No Kid Hungry

Contact: Sky Beard, Florida Director  
Email: [sbeard@strength.org](mailto:sbeard@strength.org)  
Phone: 321.223.7695

**TAB 2 | APPROACH AND METHODOLOGY**

## **(1) Approach**

Our firm is well positioned to carry out the priority tasks identified in the RFP. Specifically:

**Tracking and Reporting** | This is an essential component to any successful government affairs plan. Leading up to and throughout the Legislative Session, TAP constantly evaluates bills and amendments that are filed in order to determine what proposed language might stand to impact our clients. We suggest scheduling a bi-weekly call to discuss all legislation that has the potential to impact the City, and to ensure we are on top of every issue that matters to the City, increasing the frequency of these calls to weekly as we approach the beginning of the Session. Our team member, Jeff Woodburn, is an attorney with years of experience in legislative tracking, drafting and analysis, including extensive experience with legislation impacting local government. In addition, we ramp up the size of our team during committee meetings and session to allow us to real-time track every potential proposal or amendment that could impact our clients.

**Strategy** | We pride ourselves on our ability to see “around the corner” on issues that are important to our clients while identifying challenges and opportunities that many others would not see. We have a great deal of experience working with our local government clients to design and implement strategies while considering evolving political, policy and personnel undercurrents. While understanding your long-term goals is important to us advising you on your legislative and executive priorities, through our experience, we have found that goals evolve as circumstances change. Therefore, we believe that a disciplined system of communication is the key to success.

**Advocacy** | Advocacy is our specialty. Our clients rely on our expertise every day to be their eyes and ears in Tallahassee and to achieve results by delivering the right message to the right people at the right time. We are our clients’ ambassadors to Florida government and we understand that our conduct and actions are a direct reflection of them. Therefore, our reputation and ethics are of the utmost importance to us. From a macro perspective, given Florida’s evolving political landscape and our understanding of the City’s areas of focus we believe there is an opportunity to capitalize on the confluence of good public policy and good politics in order to work toward the realization of the City’s goals.

**Relationship Building** | In our approach to and experience representing clients, it is imperative that our clients have access to policymakers across the political spectrum. For this reason, our firm builds relationships by traveling the state to meet candidates and participate in fundraising activities for both Republicans and Democrats, alike. Our approach is to aggressively use each summer and fall to build and maintain the necessary political rapport with state policymakers – and during election season, you will see our teams out raising money and rolling up their sleeves to knock on doors for candidates. We will leverage the relationships and goodwill built through these activities in order to advance the City’s agenda and build champions for your work around the state. Having a firm with the focus and capacity to accomplish this is an invaluable part of an advocacy offering.

### **(a) Overall Approach | Communication**

The Advocacy Partners (TAP) has a great deal of experience working with local government entities to design and implement strategies while considering the evolving political, policy, and personnel

undercurrents of Florida politics. Through our experience representing the City, and our other local government clients, we have found that goals evolve as circumstances change. We have found that the key to successfully navigating those evolving circumstances has been purposeful and disciplined communication. If we should earn the privilege of continuing our representation of the City before the State, we would recommend Stephen Shiver and Sarah Suskey remain the lead contacts between the City and TAP. Although Mr. Shiver and Mrs. Suskey will serve as lead liaisons, you can be assured that all resources of TAP will be utilized to achieve the City's objectives.

As previously stated, TAP has taken a purposeful approach to limiting the number of governmental entities we have the honor to represent. The local government clients that we support are geographically spread throughout the state to ensure that our efforts on behalf of one municipal entity will not negatively affect our other local government clients.

TAP is prepared to continue building upon the achievements that we have made alongside the City Council and staff to assist with initiatives meant to spur economic development and increase the quality of life for the citizens of the City of Ocala. Based on our experience, we know that the time we spend with individual clients varies from month to month. Therefore, we would not want to limit the number of hours we dedicate to achieving the City's goals. The professionals of TAP will be available 24 hours a day, 7 days a week if we earn the honor of continuing our representation of the City.

As part of our representation of the City, we propose a proactive approach to communication. Leading up and throughout the State's yearly legislative session the team at TAP consistently evaluates filed bills and amendments to determine what language might impact the City. TAP suggests that beginning November 2024 scheduling bi-weekly calls leading up to the beginning of the 2025 legislative session. We will then transition to weekly calls as we get closer to Session to ensure that no issue goes unaddressed as the legislature ramps up. To supplement our calls, our team distributes personalized bill reports to highlight the events of the week and the legislation that we are tracking on your behalf that can be customized to meet the needs of the City.

#### (b) Proposed Segmentation/Chronology

TAP utilizes a team approach to ensure that our clients' needs are not only met but exceed expectations. Stephen Shiver and Sarah Suskey will lead these efforts while being supported by their fellow team members. The following is an initial step-by-step approach we would propose leading up to the 2025 legislative session:

##### July-October 2024

- Organize and schedule an onboarding and strategy session to reintroduce the entire TAP team to the City of Ocala senior staff and Council members, if appropriate.
- Determine priorities and policy objectives to begin the formulation of a strategic plan heading into session
- Establish a reporting and legislative issue monitoring system between TAP and the City to ensure no issue goes unnoticed and maintain our purposeful communication. This will allow our combined

teams to be up to date on legislation, committee evolutions, and all pertinent activities related to the 2025 legislative session.

#### November-May 2025

- Utilize the legislative committee weeks ahead of the 2025 legislative session to schedule in person meetings between City leadership and targeted elected officials and senior staff of the Legislature, Executive Office of the Governor, Cabinet Members, and Executive Agencies as outlined in our previously determined strategic plan.
- Establish regularly scheduled meetings between TAP and City personnel to keep officials apprised of real time issues.
- TAP will monitor and track legislation and attend committee meetings related to the City's initiatives and priorities throughout committee weeks and legislative session. TAP will also coordinate meetings, discussions, etc. with industries supporting issues related to the goals of the City. It is our responsibility and pleasure to distribute a weekly report detailing the bills of consequence to the City and will provide written updates outside of these reports as circumstances evolve.
- TAP will coordinate "Ocala Day" in Tallahassee and facilitate meetings with pertinent legislators and agency officials in support of the City's priorities.
- As challenges and opportunities present themselves, TAP will coordinate any meeting and public testimony for City Officials throughout the 2025 legislative session.

#### Year Round

- Provide advice to the City of Ocala on regulation and state policies that might materially impact the objectives set forth.
- Throughout the year, TAP will represent the City in meetings that impact policy objectives, including industry conferences, marketing materials, and networking opportunities that will be promptly reported back to City personnel on all relevant developments. This includes any pertinent interaction with the Florida League of Cities.
- Provide the City with research and background information on any relevant issues as needed.
- Provide assistance with drafting correspondence to elected officials, staff, or other government entities when necessary.

The above list is not exhaustive, TAP will modify and expand this proposed plan of action as the City's needs and priorities evolve. While any advocacy effort should have a blueprint for success, it is critical that the City's plan be fluid and retain flexibility needed to react to the ever changing and tumultuous landscape of the political and legislative processes.

#### (c) Work Plan

Our proposed approach to advocacy on behalf of the City, outlined above, is designed to meet the Scope of Work outlined in the Solicitation. Our goal as advocates is to highlight the City's needs and successes before the Legislature, Executive Office of the Governor, Executive Agencies, and other entities that are impactful to the City. We will work hand in hand with City officials to ensure we understand the City's internal control structure so that we can provide the best possible services to the City.



From a startup and timing perspective, our team is positioned to begin immediately. Our legislative representation of the City of Ocala has been a top priority for our entire firm since our relationship began in 2009. Over that time our team has immersed itself in gaining intricate and detailed knowledge of the City's priorities, challenges, and initiatives. Through constant communication, one-on-one meetings with elected officials and staff, legislative presentations and workshops our team truly views ourselves as an adjunct staff to the City. We take particular pride in the working relationship this has helped establish with the City and over the course of our engagement, we feel that we have become proficiently adept at assisting the City on an increasing array of issues.

Performance Measures | In measuring legislative lobbying services, wins and losses certainly matter. Yet, considering the many contributing factors in each instance often leads to success in various forms. Having a clear and concise set of goals and a strategy to accomplish those goals is fundamental to being able to gauge lobbying success. Additionally, the consideration of education, communication, and advancement of possible policy solutions can take time, which can lead to better outcomes despite the amount of time invested to come to a solution. A comprehensive lobbying agenda consists of long- and short-term objectives that evolve as needed. Policymakers should be made familiar with these objectives and successful lobbying services should lead to quantifiable results. In the case of the City, there should be a level of accountability each year to ensure taxpayers are receiving the best services possible.

#### (d) Understanding of City Structure | City Tasks

It is essential for the success of our relationship with the City to rely on the City of Ocala's expertise. We understand that the City is subject to thousands of laws, rule, and regulations, environmental situations, and political factors at the federal, state, and local levels that can greatly impact the City in ways that we simply would not be able to comprehend without the City's counsel. Therefore, it is imperative that TAP rely on the City's staff to identify, analyze, and make us aware of implications of any change to statute or policy at the state level, fully implementing the aforementioned communication policy, which we feel has been successful in supporting our efforts to the City in the past.

We would also request that the City:

- Work with the TAP team to develop a set of clear and concise priorities.
- Participate in weekly & bi-weekly conference calls.
- Keep us up to date on changes of material impact that would be pertinent to state policy makers and staff.

As previously mentioned, in the waning days of the Legislative Session decisions are made and minds are changed at all hours of the day, night and weekend. Therefore, TAP would ask, within reason, that the City's staff be available frequently during this part of the year.

## **(2) Identification of Anticipated Potential Problems**

It is impossible to identify specific potential problems that may arise over the course of representation due to the fluidity of issues that arise during Legislative Session, and other parts of the year. Because of this,

we feel it would be best to present a couple of different situations that could occur, and how we would resolve them.

- **Budget** | As we have done in previous years, TAP will coordinate with legislative members to sponsor specific projects to bring additional funding to the City. During the Budget conference, the possibility of a member project not being funded could absolutely occur. In an attempt to prevent this, TAP is proactive in our approach to advocating for this funding by meeting with the respective committee Chairs and leadership. If the situation where funding is not allocated were to occur, we would immediately conduct meetings with relevant committee members, staff, and leadership to address the issue to ensure that funding needed by the City is received.
- **Legislation** | As part of our job advocating on behalf of the City, we ensure that the City is provided with all proposed legislation filed heading into Session. If TAP and/or the City determine a piece of legislation would be detrimental to the City, we would work alongside City staff to implement a purposeful strategy that would incorporate what message needs to be presented, what relevant stakeholders need to be informed, and what the ultimate goal would be whether that be amending legislation or focusing on preventing the legislation from moving further along the process.
- **Executive** | If an issue was to arise with the Governor's Office or an Executive Agency, we would work alongside City staff to ensure we are aware what the City's position is, so that we are able to reach out to the state agency and governor's office leadership to achieve that goal.

### **(3) Additional Services | Value-Added Services**

**Local Ocala Engagement** | For the past fifteen years, our firm has had the privilege of representing the City of Ocala in Tallahassee. Over that period of time, we have witnessed a variety of circumstances and have a unique understanding of the City's history and background. We have deep ties with your legislative delegation and believe we have built relationships built on trust and confidence that go both ways with the City and your staff.

We know the DNA of Ocala and should the City choose to continue our relationship, there will be no transition time or learning curve to manage. Our understanding of the dynamics of the community and your government structure is second to none and we are deeply personally invested in the City's success. We are committed to your success, excited about what you are building, and we want to continue to be a part of it.

**Political Networking/Fundraising** | It is important that our clients have access to policymakers across the political spectrum. For this reason, TAP builds purposeful relationships by traveling the state to meet with candidates and participate in fundraising activities for both Republications and Democrats alike. Building political goodwill is extremely important and will be valuable leading into the 2025 Session where the Legislature will see many new members and new leadership in both the House and Senate. TAP's approach is to aggressively use each summer and fall to build and maintain the necessary political rapport with state policymakers. At no additional cost, the City would benefit from the relationships and goodwill built through these activities. Having a firm with the focus and capacity to accomplish this is an invaluable part of an advocacy offering.

Specific Transportation Focus | TAP has a great deal of experience and expertise in the world of transportation. With several private and public sector clients in this industry, TAP has carved out a niche of contacts and relationships across the entire transportation sector in Florida. Additionally, TAP is the lead transportation lobbyist for Associated Industries of Florida (AIF), Florida's largest business Association. As part of this work, we serve on their Florida Transportation and Maritime Council where we present during AIF's yearly Summer and Fall Policy Retreat's. Additionally, TAP spent over a decade representing the largest road building-specific organization, the Asphalt Contractors Association of Florida.

Specific Economic Development Expertise | TAP has collaborated with local government officials and staff across the state of Florida to communicate and enhance efforts with relevant stakeholders to broaden the effects that initiatives ultimately have in terms of local job growth. TAP believes there is great value in experience and resources in the way of economic development, and we would utilize our extensive efforts to work collectively on behalf of the City with state incentive offices, elected officials, and private industries through meetings, forums, and public hearings to bring awareness to the City's economic development efforts and capabilities. We strongly believe that TAP can continue to ass significant value to the City and its efforts to bring more jobs and a stable economy to its citizens.

Ability to contract with a Federal Lobbyist | If so desired by the City, TAP has the ability to contract federal lobby efforts on behalf of the City at a negotiated contract rate. TAP has a strategic relationship with Squire Patton Boggs, a well-renowned, worldwide law firm who provides federal lobbying services in Washington, DC. TAP as coordinated and contracted these services on behalf of the City in our prior agreement and will continue to have the capacity to do so should we earn the honor of continuing our representation.

**TAB 3 | Price Proposal**

**(1) Price Proposal**

Since the onset of our initial representation, TAP has become intimately familiar with the needs and inner workings of the City. We are appreciative of this proposal process as it provides an opportunity to evaluate the way we can enhance our services to the City, as well as review compensation commensurate with the value our firm provides to the City. Based on our experience, as well as the inventory of tasks articulated in the Scope of Work, we would request that our fee for advocacy services be \$65,000 per year – or \$5,416.67 per month, inclusive of all costs. However, this price proposal is negotiable based upon the scope of services.

## Attachment A – Insurance



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
5/29/2024

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

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

<b>PRODUCER</b> McKee Insurance Agency 3512 Maclay Blvd Tallahassee FL 32312		<b>CONTACT NAME:</b> Amanda Lewis <b>PHONE (A/C No. Ext):</b> 8502246055 <b>FAX (A/C No):</b> 850-513-0646 <b>E-MAIL ADDRESS:</b> amanda@mckeeagency.com	
<b>INSURED</b> The Advocacy Group at Cardenas Partners LLC 204 S Monroe St Tallahassee FL 32301-1840		<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Depositors Insurance Company <b>INSURER B:</b> Nationwide Mutual Insurance Company <b>INSURER C:</b> Beazley Insurance Company, Inc. <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	
License#: L100460 ADVOGRO-01		<b>NAIC #</b> 42587 23787 37540	

## COVERAGES

CERTIFICATE NUMBER: 1051045623

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADOL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	ACBP015924991157	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	ACBP015924991157	7/1/2023	7/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ Included BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$	Y	Y	ACPCU015924991157	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	ACPWC015934869495	2/7/2024	2/7/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Errors & Omissions			W11C36231301	7/15/2023	7/15/2024	Each Claim Aggregate 1,000,000 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

## CERTIFICATE HOLDER

## CANCELLATION

City of Ocala 110 SE Watula Ave Ocala FL 34471	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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Bidder:

ProRFx ID: RFP04252400000120

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## Review Phase

[SHOW LISTING DETAILS](#) ▼**Scoring:** Use a Scoring Matrix: Display Criteria and Worth to Bidders

<b>Scoring Matrix:</b>	Qualifications, Experienc... <a href="#">MORE</a> ▼	40%
	Approach and Methodology,... <a href="#">MORE</a> ▼	40%
	Price Proposal	20%

**Scoring Personnel:** [emarquez@ocalafl.org](mailto:emarquez@ocalafl.org)Sort By: [Price Low-High](#) ▼

Compare

Award this and save \$735K or 79% compared to the highest bid

**The Advocacy Group at Cardenas Partners LLC**204 South Monroe Street  
Tallahassee, FL, 32301**Sarah Busk**Email: [sjb@cardenaspartners.com](mailto:sjb@cardenaspartners.com)

Work: +1(850)2228900

Cell: +1(850)3459392

Vendor Bidding History:  
Bids - 2, Awards - 1**Vendor Bid****COMPLETE**Labor \$195,000.00  
Material + \$0.00**\$195,000.00**

Score Needed

- ☐ [REJECT](#)
- ☐ [FINALIST \[?\]](#)
- ☐ [BAFO \[?\]](#)

Award Status

- ☒ No Award
- ☐ Set Award Status

☐ Compare**Viewing**

INTERNAL INFO (not displayed to internet users)

SHOW ▾

EXTERNAL INFO (displayed to all internet users)

SHOW ▾

Previous Page 1 ▾ of 1 Next


Sort By: Price Low-High ▾

 Compare[Listing View](#)[Vendor Questions](#) (0, 0)**Bid Details**[Scoring](#)**Services - RFP**Bidder: **The Advocacy Group at Cardenas Partners LLC**Submitted: **5/29/2024 6:48:22 PM**

Show

Steps-to-Complete

Standard View ▾

**1. Response Requirements****\*1.1. General Terms & Conditions***One or more items in this section are required.*☒ \* By checking this box you have read and agree to abide by the City's Terms & Conditions. [Click to open and read the General Terms and Conditions this transaction will be governed with.](#)

Enter your full name (Owner/Authorized Company Representative only):

Stephen W. Shiver

**1.2. Anti-Lobbying/Communication****ANTI-LOBBYING/COMMUNICATION WITH CITY STAFF AND OFFICIALS:**

To ensure fair consideration for all proposers/bidders, the City strictly prohibits any communication, whether or not written, verbal, or through a third party, relative to this solicitation with any department, City official, City Council member, or employee during the submission process, except inquiries directly made to the Procurement and Contracting Department, Contracting Officer, or as provided in the protest policy located at: [Protest Policy](#)

Additionally, the City prohibits communications initiated by a proposer/bidder, agent, or third party of proposer/bidder to any City official(s), City Council member(s), or employee(s) evaluating or considering the proposals/bids prior to, and up to the time an award decision is made at a scheduled City Council meeting.

**\*\*\* Any prohibited communications initiated by a proposer/bidder, or a third party on behalf of proposer/bidder, will be grounds for disqualifying the offending proposer/bidder from consideration for award of the solicitation >AND< will face a three (3) year debarment from doing any business with the City of Ocala. \*\*\***



**\*1.3. Vendor Agreements***One or more items in this section are required.***Compliance Certification:**

As an authorized company representative, I certify my firm or corporation:

☒ Agrees to comply with the requirements of Florida Statute 287.087 for a Drug Free Workplace.

☒ Agrees to comply with the requirements of Florida Statute 448.095 for Employment Eligibility. Employers, contractors and their subcontractors are required to register and use the Department of Homeland Security's E-Verify system when hiring new employees for the term of the contract. Violations will result in contract termination. (E-Verify is operated by the U.S. Department of Homeland Security).

**Owner/Authorized Company Representative initials:**

**1.4. Insurance**

Click  [HERE](#) to download the Standard Insurance Requirements for the City of Ocala

**\*1.5. SPECIAL CONDITIONS***One or more items in this section are required.***ADA NEEDS:**

Please call the procurement professional shown on this listing forty-eight (48) hours in advance so arrangements can be made if reasonable accommodations are needed for you to participate in any meeting.

**AWARDED CONTRACT FAILURE - BIDDING SUSPENSION**

☒ **I understand and agree to the following:**

Bidders who submit a bid to the City of Ocala and fail to fulfill the contract term, for any reason, will be subject to future bidding suspension for year (1), and up to a possible three (3) year bid debarment for serious contractual failures.

**Owner/Authorized Company Representative initials:**

**BIDDER CONTRACTS:**

Bidder contracts/agreements will not be accepted in most cases. If a contract is required, only City of Ocala contracts will be used for all goods and services. The requirement of bidder contracts and/or bidder written terms and conditions may result in bid rejection. The City will consider adding appropriate bidder clauses into our contract; please upload any desired clauses with your solicitation response.

**CLARIFICATIONS AND CORRECTIONS:**

The City of Ocala reserves the right, where it may serve the City's best interest, to request additional information or clarifications from bidders/proposers, or to allow corrections of errors or omissions.

**CONFIDENTIAL, PROPRIETARY, OR TRADE SECRET MATERIAL:**

The City of Ocala (City) shall handle all written competitive submissions, replies, oral presentations, other submissions, correspondence, meetings and all records made thereof, and all other records concerning this solicitation in compliance with Chapters 119 and 286, Florida Statutes and Article 1, Section 24 of the Florida Constitution.

Proposals or replies received by the City pursuant to its solicitations are exempt from public disclosure until such time that the City provides notice of an intended decision or until thirty (30) days after opening the proposals, whichever is earlier. If the City rejects all proposals or replies pursuant to this solicitation and provides notice of its intent to reissue the

solicitation, then the rejected proposals or replies remain exempt from public disclosure until such time that the City provides notice of an intended decision concerning the reissued solicitation or until the City withdraws the reissued solicitation. A proposal or reply shall not be exempt from public disclosure longer than twelve (12) months after the City's initial notice rejecting all proposals or replies.

Upon award recommendation or ten (10) days after opening, bids become "public records" and shall be subject to public disclosure consistent with Chapter 119 (Public Records) and Section 815.045 (Trade Secret Information), Florida Statutes. Should bidders/proposers consider any information related to their proposal or the services to be provided to City to be proprietary, a trade secret, or otherwise constitute confidential material under Florida or federal law, bidder/proposer shall designate such portion of the material as such by clearly marking it as CONFIDENTIAL, PROPRIETARY, or TRADE SECRET and submit both a non-redacted and redacted copy of their submission. The redacted copy shall only exclude or obliterate the exact portions claimed to be confidential, proprietary, or trade secret. Additionally, bidder/proposer shall state the basis for of the exemption that it contends is applicable to the record, to include the statutory citation to an exemption created or afforded by statute.

**THE CITY WILL MAKE NO EFFORT TO VERIFY WHETHER OR NOT THE REDACTED MATERIAL IS EXEMPT FROM CHAPTER 119, FLORIDA STATUTES. THAT DETERMINATION IS TOTALLY THE RESPONSIBILITY OF THE BIDDER/PROPOSER AND THE BIDDER/PROPOSER SHALL BE SOLELY RESPONSIBLE FOR DEFENDING ITS DETERMINATION THAT THE REDACTED PORTIONS OF ITS RESPONSE ARE CONFIDENTIAL, TRADE SECRET, OR NOT OTHERWISE SUBJECT TO DISCLOSURE. PROPOSER SHALL PROTECT, DEFEND, AND INDEMNIFY THE CITY FOR ANY AND ALL CLAIMS ARISING FROM OR RELATING TO PROPOSER'S DETERMINATION THAT THE REDACTED PORTIONS ARE NOT SUBJECT TO DISCLOSURE. IF THE PROPOSER FAILS TO SUBMIT A REDACTED COPY OF ITS SUBMISSION, ANY CLAIM OF CONFIDENTIALITY IS WAIVED, AND THE CITY SHALL BE AUTHORIZED AND REQUIRED TO PRODUCE THE ENTIRE DOCUMENT OR RECORD IN ITS ANSWER TO A PUBLIC RECORDS REQUEST FOR SAID RECORDS.**

**I have read and understand my responsibilities regarding any purported confidential, PROPRIETARY, or trade secret material contained in my proposal AND (please select the appropriate statement below):**

☒ I have not included a redacted copy of our proposal.

☐ I have included a redacted copy of our proposal along with this original.

**Owner/Authorized Company Representative initials:**

**CONFLICT OF INTEREST:**

Disclose the name(s) of any employee, officer, director, shareholder, or agent of your firm that is also a City of Ocala employee or public official:

Disclose the name(s) of any City of Ocala employee or public official that is a known relative of an employee, officer, director, shareholder, or agent of your firm:

**Failure to disclose known conflicts of interest may result in bid**

**rejection and/or contract termination, if awarded.**

City of Ocala employees who have a 5% or more interest in a bidder's firm must also complete an "Officer and Employee Disclosure Statement" which can be obtained at [www.bidocala.com](http://www.bidocala.com) under Vendor Resources. This form includes instructions and relative Florida statutes. Failure to complete this form, if applicable, may result in bid rejection.

**CONTRACT LENGTH:**

The term of any resulting contract will be for 3 year(s).

**CONTRACT RENEWAL:**

The resulting contract may be renewed for up to 1 times, with each renewal a 3 year term with the written consent of both parties.

**PERFORMANCE EVALUATION:**

At the end of the service period, the City may evaluate vendor performance. This evaluation will become public record.

**FLORIDA STATUTE 287.133: Public Entity Crime;** denial or revocation of the right to transact business with public entities.

☒ **Vendor on its behalf and its affiliates agrees and affirms that it has not been placed on the convicted vendor list following a conviction of a public entity crime as provided for in Section 287.133(2)(a), Florida Statutes, which states:**

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

**Owner/Authorized Company Representative initials:**

**REFERENCES:**

References within the previous **three years** are preferred.

**REFERENCE #1****Company Name:****Contact Person:****Phone Number:****Email Address:****Date of Service:**

to

**Contract Value:****Contract Details and/or Description:**

TAP has represented Okaloosa County in Tallahassee since 2010, providing representation before both the legislative and executive branches of Florida government. TAP takes particular pride in the working relationship we have established with the County and over the course of our engagement, we feel that we have become adept at assisting the County on an increasing array of issues. Over the course of our relationship, TAP has worked with the Legislature and the Governor's Office to secure nearly \$30 million in state appropriations for

the County, including consistent funding for the County's Mental Health Diversion program and numerous Water Quality and Transportation projects. In addition to the appropriations successes, TAP assists the County with advice and strategy related to the annual legislative priorities, facilitates Okaloosa County Day during the Legislative Session, and organizes other legislative visits throughout the year. Additionally, our firm has been an active participant with the Okaloosa County Delegation through the attendance of hearings with County officials, assisting in the communication between the legislative delegation staff and the County, and helping craft legislative priorities and messages that are presented to the delegation. We also engage in advocacy before the Governor's Office and multiple state agencies. Over the course of our representation on behalf of the County, our role and level of engagement has matured, and our firm has been called on to work on a broad array of issues. TAP has successfully advocated for the extension of the County's ability to use a portion of Tourist Development Tax dollars to fund certain public safety expenditures, staving off a \$11.6 million hit to the County's general fund. Additionally, TAP worked to ensure that the County be included in the Governor's emergency order related to Hurricane Sally, in order to be properly positioned to receive FEMA funding and assisted with expediting wetland permitting processes under the Florida Department of Environmental Protection. In years past, TAP has been successful in adding Okaloosa County to the Forensic Hospital Diversion Program, staved off multiple attempts to dissolve the Mid-Bay Bridge Authority, assisted in securing a grant through the Florida Department of Commerce Defense Reinvestment Grant Program and worked with legislators and the Department of Transportation to address traffic congestion on Hwy 85 in Crestview. The latter currently has multiple projects in the Work Program, including a bypass around the City of Crestview, which incorporates a new interchange at I-10 and Antioch Road. Recently, appropriations TAP has worked to secure on behalf of Okaloosa County include: • Okaloosa Shoal River Ranch Water Reclamation Facility \$7,000,000 • Okaloosa County Special Needs Ball Field and Park \$1,250,000 • Okaloosa County - West Highway 98 Collector Road \$375,000 • Okaloosa Walton Mental Health Pilot \$1,375,000 (4 yr total) • Niceville Area Multi-Purpose Pathway \$1,500,000 • Okaloosa – CR 2 Road Safety and Bridge Upgrades \$3,000,000 • Okaloosa County US 98 Bridge-to-Bridge Multi-Use Path \$1,500,000 • US 90 Intersection Improvements at Jericho Road \$1,000,000 • Cinco Bayou-Glenwood Park Water Quality Improvement \$300,000 • Okaloosa County Overbrook Area Flooding \$750,000 • Okaloosa Florosa Potable Water Elevated Storage Tank \$1,500,000 • Okaloosa County Agriculture Center \$854,100 • City of Crestview Streetscape Renovation \$1,000,000 • Okaloosa County Live Oak Church Road Bridge \$1,500,000 • Okaloosa County Lloyd Street Mayflower Stormwater \$1,500,000

**REFERENCE #2****Company Name:****Contact Person:****Phone Number:****Email Address:****Date of Service:**

to

**Contract Value:****Contract Details and/or Description:**

In the wake of Hurricane Ian, the worst natural disaster on record for Southwest Florida, the Lee County Board of County Commissioners turned to our firm to assist them with their State government priorities in

Tallahassee. Our firm was retained by the Lee County Board of County Commissioners at the end of 2022, and in our first year of representation, our team helped secure over \$80M in direct member project appropriations. Additionally, our team has supported local government grant funding opportunities on behalf of the Lee County totaling over \$700M. Each local government grant funding opportunity was passed by the legislature and approved by the Governor. Our approach to help secure this funding was to work closely with Lee County Commissioners, county staff, and the Lee County Legislative Delegation to identify areas of critical and immediate need. We then provided strategic assistance to county staff while they composed appropriations projects forms and made sure all deadlines were met throughout that process. Our team then worked with the Chair's and staff of each respective chamber's appropriations subcommittees of jurisdiction, Chair's and staff each respective full appropriations committee, and the Speaker of the House and Senate President to make sure everyone understood the challenges being faced by Lee County, and our thoughts on state-based solutions. We also spent a lot of time with staff in Governor DeSantis' Executive Office and the Governor's Office of Policy and Budget to ensure they were clear on the County's priorities, and why they were so critical to the recovery efforts. On the implantation side, our firm worked to ensure open lines of communication between leadership of the funding Agencies and Departments (Department of Transportation, Department of Commerce, and Department of Emergency Management, Department of Environmental Protection, etc.) to make sure Lee County was able to access as much of these funds as possible, and to make sure that coming to terms with the funding agencies went as smoothly as possible.

#### REQUESTED AND ADDITIONAL DOCUMENTS

Upload any requested and additional documents here:

Upload



[Certificate.pdf](#) (PDF, 143.8 KB)

Browse...

Max. File Size you can upload is: 50MB. \*.exe files will not be accepted

#### SAFETY AND ENVIRONMENTAL:

Vendor will be responsible at all times for precautions to achieve the protection of all persons including employees and property throughout the resulting contract term. The Vendor shall make an effort to detect hazardous conditions and shall take prompt action where necessary to avoid accident, injury or property damage. EPA, DEP, OSHA, and all other applicable safety laws and ordinances shall be followed as well as American National Standards Institute Safety Standards. All hazardous spills, accidents, injuries or claims or potential claims shall be reported promptly to the City Risk Management Department at 352-401-3989, or cell 352-572-0414, and [rdennis@ocalafl.org](mailto:rdennis@ocalafl.org).

☒ Agrees to comply with the safety and environmental requirements above.

Owner/Authorized Company Representative initials:

#### SOLICITATION DOCUMENTS:

The City of Ocala (City) has no responsibility for the accuracy, completeness or sufficiency of any bid documents obtained from any source other than the official City links below:

Bid Ocala: [www.bidocala.com](http://www.bidocala.com)

ProRFx Florida: [www.florida.prorfx.com](http://www.florida.prorfx.com)

Obtaining these documents from any other source(s) may result in obtaining incomplete and inaccurate information. Obtaining these documents from any source other than directly from the source listed

herein may also result in failure to receive any addenda, corrections, or other revisions to these documents that may be issued.

## 1.6. Electronic Bid Response

### ELECTRONIC BID RESPONSE REQUIRED:

All bids/proposals **MUST be electronically submitted** by or before the due date under the appropriate solicitation/listing accessed online at:

[www.bidocala.com](http://www.bidocala.com) or [www.prorfx.com](http://www.prorfx.com)

Bids/proposals **may not be submitted by any other means** other than as described above. The City will **NOT** accept bids/proposals sent by U.S. Mail, private couriers, fax or email.

## 1.7.1. Price Proposal

Item 1 of 1

Qty 3

Unit of Measure YEAR

Type of Product ANNUAL FEE

MFG Name ---

MFG Part No ---

Description of what is needed Enter your annual fee to provide state legislative lobbyist services.

Your Bid (Unit Price in \$)

## 2. Upload Proposal HERE

### \*2.1. Lobbyist Services -State Legislative

*One or more items in this section are required.*

Upload your firm's complete RFP response HERE.

 [RFP\\_CMO-24...](#) (PDF, 922.1 KB)

Max. File Size you can upload is: 50MB. \*.exe files will not be accepted

[Terms & Conditions](#) | [Privacy Statement](#) | [About ProRFX.com](#) | [Accessibility](#) | [Contact Us](#)

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## Review Phase

[SHOW INSTRUCTIONS](#) ▼

## Transaction Fee:

[Yes](#)

## ProRFx ID:

RFP04252400000120

## ProRFx Type:

RFP: Services

## Format:

Client Purchase

## Solicitation No:

RFP# CMO/240646

## Listing Category:

[80101707] Lobbying services

## Scope of Work:

BACKGROUND INFORMATION The City of Ocala is seeking a highly qualified lobbyist who has successfully provided lobbyist services in the state of Florida for local governmental jurisdictions. These services shall include, but not be limited to the following: scheduled, extended, special legislative sessions and meetings; state administrative and age... [VIEW ALL](#)

## Bid Name:

LOBBYIST SERVICES - State Legislative

## Listing Image:

[Pic\\_9189b986.jpg](#) (JPG, 54 KB)

## Industry Type:

City and town managers' offices

## Contact Name:

Ms. Eileen Marquez

## Contact Phone:

(352) 629-8362

## Ship to Location:

110 SE Watula Avenue

## Address1:

110 SE Watula Avenue

## Address2:

CITY HALL

## City:

Ocala

## State:

FL

## Zip/Postal:

34471

## Listed By:

CITY OF OCALA

## Listing Creator:

[Contact information](#)

## Contact Email:

emarquez@ocalafl.gov

## Listing Class.:

**RFP** Request For Proposal

## Listing Ends After:

End Date/Time reached

## Listing Start Date:

5/6/2024 10:53:55 AM EST

## Listing End Date:

5/30/2024 2:00:00 PM EST

## Bid Closes:

5/30/2024 2:00:00 PM EST

## Listing Status:

**CLOSED** [Award Review](#)

## IMPORTANT COMMENTS EXIST

[View Answers & Comments](#)

## IMPORTANT BID DOCUMENT(S)

1. [REV 5.24.24 Request ...](#) [MORE](#) ▼ (324.1 KB - PDF)

## Formal Question Due By:

5/28/2024 @ 5:00 PM EST

## Scoring:

Use a Scoring Matrix: Display Criteria and Worth to Bidders

## Scoring Matrix:

Qualifications, Experienc...	Approach and Methodology,...
<a href="#">MORE</a> ▼	<a href="#">MORE</a> ▼
40%	40%
Price Proposal	
20%	

## Scoring Personnel:

[emarquez@ocalafl.org](#)

Options ▼

ProRFx Item 1 of 1 ▼

## Description of what is needed:

Qty: 3

Unit of Measure: **YFAR**

Vendor Bid

<div>Enter your annual fee to provide state legislative lobbyist services.</div>	No Bid
--	--------



## Listing View

[Vendor Questions \(2, 2\)](#) [Bids \(5\)](#) [Scoring](#)

Template: RFP ()



## Services - RFP

## Header (6 steps to complete)

- 1.\*General Terms & Conditions
2. Anti-Lobbying/Communication
- 3.\*Vendor Agreements
4. Insurance
- 5.\*SPECIAL CONDITIONS
6. Electronic Bid Response

[REQUIRED] [?]

[BLANK] [?]

[REQUIRED] [?]

[BLANK] [?]

[REQUIRED] [?]

[BLANK] [?]

## Item 1 (1 steps to complete)

7. Price Proposal

[BLANK] [?]

## Footer (1 steps to complete)

- \*Lobbyist Services -State Legislative

[REQUIRED] [?]

## 1. Response Requirements

## \*1.1. General Terms &amp; Conditions

One or more items in this section are required.

☐ \* By checking this box you have read and agree to abide by the City's Terms & Conditions.☒ [Click to open and read the General Terms and Conditions this transaction will be governed with.](#)

Enter your full name (Owner/Authorized Company Representative only):

## 1.2. Anti-Lobbying/Communication

## ANTI-LOBBYING/COMMUNICATION WITH CITY STAFF AND OFFICIALS:

To ensure fair consideration for all proposers/bidders, the City strictly prohibits any communication, whether or not written, verbal, or through a third party, relative to this solicitation with any department, City official, City Council member, or employee during the submission process, except inquiries directly made to the Procurement and Contracting Department, Contracting Officer, or as provided in the protest policy located at: [Protest Policy](#)

Additionally, the City prohibits communications initiated by a proposer/bidder, agent, or third party of proposer/bidder to any City official(s), City Council member(s), or employee(s) evaluating or considering the proposals/bids prior to, and up to the time an award decision is made at a scheduled City Council meeting.

\*\*\* Any prohibited communications initiated by a proposer/bidder, or a third party on behalf of proposer/bidder, will be grounds for disqualifying the offending proposer/bidder from consideration for award of the solicitation >AND< will face a three (3) year debarment from doing any business with the City of Ocala. \*\*\*

## \*1.3. Vendor Agreements

One or more items in this section are required.

## Compliance Certification:

As an authorized company representative, I certify my firm or corporation:

☐ Agrees to comply with the requirements of Florida Statute 287.087 for a Drug Free Workplace.☐ Agrees to comply with the requirements of Florida Statute 448.095 for Employment Eligibility. Employers, contractors and their subcontractors are required to register and use the Department of Homeland Security's E-Verify system when hiring new employees for the term of the contract. Violations will result in contract termination. (E-Verify is operated by the U.S. Department of Homeland Security).

Owner/Authorized Company Representative initials:

## 1.4. Insurance

Click [HERE](#) to download the Standard Insurance Requirements for the City of Ocala

## \*1.5. SPECIAL CONDITIONS

One or more items in this section are required.

## ADA NEEDS:

Please call the procurement professional shown on this listing forty-eight (48) hours in advance so arrangements can be made if reasonable accommodations are needed for you to participate in any meeting.

## AWARDED CONTRACT FAILURE - BIDDING SUSPENSION

☐ I understand and agree to the following:

Bidders who submit a bid to the City of Ocala and fail to fulfill the contract term, for any reason, will be subject to future bidding suspension for year (1), and up to a possible three (3) year bid debarment for serious contractual failures.

Owner/Authorized Company Representative initials:

## BIDDER CONTRACTS:

Bidder contracts/agreements will not be accepted in most cases. If a contract is required, only City of Ocala contracts will be used for all goods and services. The requirement of bidder contracts and/or bidder written terms and conditions may result in bid rejection. The City will consider adding appropriate bidder clauses into our contract; please upload any desired clauses with your solicitation response.

## CLARIFICATIONS AND CORRECTIONS:

The City of Ocala reserves the right, where it may serve the City's best interest, to request additional information or clarifications from bidders/proposers, or to allow corrections of errors or omissions.

CONFIDENTIAL PROPRIETARY OR TRADE SECRET MATERIAL

**CONFIDENTIAL, PROPRIETARY, OR TRADE SECRET MATERIAL:**

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- ☐ I have not included a redacted copy of our proposal.
- ☐ I have included a redacted copy of our proposal along with this original.

**Owner/Authorized Company Representative initials:**

**CONFLICT OF INTEREST:**

Disclose the name(s) of any employee, officer, director, shareholder, or agent of your firm that is also a City of Ocala employee or public official:

Disclose the name(s) of any City of Ocala employee or public official that is a known relative of an employee, officer, director, shareholder, or agent of your firm:

**Failure to disclose known conflicts of interest may result in bid rejection and/or contract termination, if awarded.**

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**Owner/Authorized Company Representative initials:**

**REFERENCES:**

References within the previous **three years** are preferred.

**REFERENCE #1**

**Company Name:**

**Contact Person:**

**Phone Number:**

**Email Address:**

**Date of Service:**



to

Contract Value:

\$0.00

Contract Details and/or Description:

REFERENCE #2

Company Name:

Contact Person:

Phone Number:

Email Address:

Date of Service:

to

Contract Value:

\$0.00

Contract Details and/or Description:

**REQUESTED AND ADDITIONAL DOCUMENTS**

Upload any requested and additional documents here:

Upload

**Not Uploaded**

Browse...

Max. File Size you can upload is: 50MB. \*.exe files will not be accepted

**SAFETY AND ENVIRONMENTAL:**

Vendor will be responsible at all times for precautions to achieve the protection of all persons including employees and property throughout the resulting contract term. The Vendor shall make an effort to detect hazardous conditions and shall take prompt action where necessary to avoid accident, injury or property damage. EPA, DEP, OSHA, and all other applicable safety laws and ordinances shall be followed as well as American National Standards Institute Safety Standards. All hazardous spills, accidents, injuries or claims or potential claims shall be reported promptly to the City Risk Management Department at 352-401-3989, or cell 352-572-0414, and rdennis@ocalafl.org.

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Owner/Authorized Company Representative initials:

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Obtaining these documents from any other source(s) may result in obtaining incomplete and inaccurate information. Obtaining these documents from any source other than directly from the source listed herein may also result in failure to receive any addenda, corrections, or other revisions to these documents that may be issued.

**1.6. Electronic Bid Response****ELECTRONIC BID RESPONSE REQUIRED:**

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[www.bidocala.com](http://www.bidocala.com) or [www.prorfx.com](http://www.prorfx.com)

Bids/proposals **may not be submitted by any other means** other than as described above. The City will **NOT** accept bids/proposals sent by U.S. Mail, private couriers, fax or email.

**1.7.1. Price Proposal**

Item 1 of 1

Qty  
3

Unit of Measure  
YEAR

Type of Product  
ANNUAL FEE

MFG Name  
----

MFG Part No  
----

Description of what is needed  
Enter your annual fee to provide state legislative lobbyist services.

Your Bid (Unit Price in \$)

**2. Upload Proposal HERE**

**\*2.1. Lobbyist Services -State Legislative**  
*One or more items in this section are required.*

Upload your firm's complete RFP response HERE.

Browse...

Upload

Not Uploaded

Max. File Size you can upload is: 50MB. \*.exe files will not be accepted

Submit

## Scope Of Work

### BACKGROUND INFORMATION

The City of Ocala is seeking a highly qualified lobbyist who has successfully provided lobbyist services in the state of Florida for local governmental jurisdictions. These services shall include, but not be limited to the following: scheduled, extended, special legislative sessions and meetings; state administrative and agency hearings, meetings, or rule making proceedings; and legal and legislative consulting services. The lobbyist will assist the City Council and key City of Ocala staff in identifying current legislative issues impacting the City of Ocala, specifically, and Florida cities, in general.

The lobbyist will be required to advance the City's vision, strategic goals and priorities to the Marion County legislative delegation, other members of the General Assembly, as appropriate, and State of Florida, executive, legislative and administrative staff on an as needed basis. The lobbyist will recommend, and implement the most effective ways to gain access to legislative and State of Florida officials, and help craft and deliver both verbal and written messages. The lobbyist will work closely with the City Council or its liaison to recommend modifications and/or strategies to impact legislative measures, and assist in effectuating these impacts in a timely manner when legislative changes can be realistically achieved.

The City of Ocala is governed by a five (5) member City Council. The Mayor is elected at large for a two (2) year term. The City functions as a Council/Manager form of government with the administrative responsibilities vested with the City Manager. The City Council appoints the City Manager, City Attorney, and the City Clerk.

The City of Ocala, the largest municipality located in Marion County in North Central Florida, has a staff of approximately 1100 full-time and part-time employees serving a population of 66,000 permanent residents. The City's daytime population is approximately 120,000. The City encompasses approximately 47 square miles. The successful applicant's fee will be contingent upon experience, skills, and successes in similar endeavors.

### OBJECTIVES OF THIS PROPOSAL

(a) The lobbyist will develop and implement a unique and tailored strategy, in consultation with the City of Ocala City Council and staff that increases the consciousness and awareness of the City of Ocala among the State of Florida legislature, executive, including the Governor, and administrative agencies, regional and local government entities and

others as deemed necessary or desirable. These services may include acquiring sponsors and supporters for City legislative, financial, or administrative initiatives in the following areas:

- (1) Protection of City Revenue Sources
- (2) Home Rule Legislation and Issues
- (3) Property Tax Legislation and Issues
- (4) Economic Development and Enterprise Zones Legislation, Issues and Funding
- (5) Community Redevelopment Legislation and Issues, including CRAs
- (6) Transportation Legislation, Issues and Funding
- (7) Water and Wastewater Issues and Funding
- (8) Stormwater Management Issues and Funding
- (9) Telecommunications, Fiber and E-Commerce Issues and Funding
- (10) Protection of Municipal Utilities from Regulation of the Public Service Commission (PSC) Legislation and Issues
- (11) Parks and Recreation Legislation, Issues and Funding
- (12) Environmental Legislation, Issues and Funding
- (13) Public Safety and Law Enforcement Legislation, Issues and Funding
- (14) Public Official Financial Compensation and Pension Legislation and Issues
- (15) Growth Management and Land Use Legislation and Issues
- (16) Uniform Building Code/Construction and Permitting Legislation and Issues
- (17) Disaster Relief Legislation, Issues and Funding
- (18) Special Acts Related to the City of Ocala
- (19) Other miscellaneous legislative initiatives
- (20) Opportunity Zones Issues and Funding

**Please see attached Request for Proposals ("RFP"), and exhibits for more information.**

Qty	Unit of Measure	Type of Product	MFG Name	MFG Part No	Description of what is needed	Price (Interest Percent)	Price (Unit Cost in \$)	Price (Margin in \$)	Price (Margin in %)
3	YEAR	ANNUAL FEE			Enter your annual fee to provide state legislative lobbyist services.				