

**Leon County Research and Development Authority  
Board of Governors Meeting**

Thursday, February 2, 2017

Knight Administrative Centre

1736 W. Paul Dirac Drive, Tallahassee, FL 32310

**Agenda**

1. Call to Order
2. Introduction of Guests
3. Modifications to Agenda
4. Public Comment
5. Approval of Draft Meeting Minutes, Board of Governors, December 1, 2016 (*Attachment A*)
6. Consent Agenda
  - a. Treasurer's Report
    - i. Report November/December (*Attachment B*)
    - ii. Monthly Financial Report, November 2016 ([link](#))
    - iii. Monthly Financial Report, December 2016 ([link](#))
  - b. Investments
    - i. Report, November 2016 (*Attachment C1*)
    - ii. Report, December 2016 (*Attachment C2*)
    - iii. Investment Policy Change (*Attachments C3, C4*)  
*Staff requests approval of changes to the Investment Policy to eliminate language duplication with the Investment Advisory Committee Charter and incorporate the Charter into the Policy by reference.*
  - c. Jump Start Committee
    - i. Report, December 15, 2016 (*Attachment D1*)
    - ii. Report, January 17, 2017 (*Attachment D2*)
7. Jump Start
  - a. Status Update—Kristin Dozier, Immediate Past Chair & Jump Start Committee Chair
  - b. Architectural & Engineering Study Agreement (*Attachment E*)—Ron Miller, Executive Director  
*Staff requests approval of an agreement with Lewis + Whitlock to conduct an architectural and engineering study of the Collins Building for use as the JumpStart Incubator at a lump sum fee of \$23,140.*
8. Chair's Report—Anne Longman, Chair
  - a. Meetings held with County and City Commissioners
  - b. Other
9. Entrepreneurial Excellence Program (EEP)
  - a. Presentation—Larry Lynch, EEP Director
  - b. State of Florida, Legislative Funding Budget Request (*Attachment F*)—Ron Miller, Executive Director

*Staff requests approval to submit to the Florida Legislature, for inclusion in the 2017-18 state budget, a legislative funding budget request for \$250,000. The request, if approved by the State, will fund the EEP \$50,000 per year for 5 years.*

10. Staff Reports:

- a. Executive Director's Report (*Attachment G*)
  - i. *OEV meetings*
  - ii. *Investment reallocation*
  - iii. *Collins Building status*
  - iv. *Audit status*
  - v. *Lease prospects status*
  - vi. *Mag Lab Housing*
  - vii. *Lease renewal FSU ISPA in Morgan Building*
  - viii. *Other*
- b. Director of Programs and Communications Report (*Attachment H*)
  - i. *Tech Grant*
  - ii. *Tech Topics*
  - iii. *Discovery on Parade*
  - iv. *Website changes*
  - v. *Marketing Materials-Drone video and images*
  - vi. *Other*
- c. Property Manager's Report (*Attachment I*)

11. New Business

12. Adjourn

**Next Meeting: April 6, 2017**

(Subsequent meetings held the first Thursday of even numbered months.)

**Leon County Research and Development Authority**  
**Board of Governors Meeting**  
Thursday, December 1, 2016  
Knight Administrative Centre  
1736 W Paul Dirac Drive, Tallahassee, FL 32310

**Minutes**

**Members in Attendance:** Anne Longman, Keith Bowers (arrived at 12:05pm), Dustin Daniels, Rick Frazier (arrived at 11:30am), Eric Holmes, Dave Ramsay, April Salter, Kim Williams.

**Members not in Attendance:** Paul Dean, Kim Dixon, Kristin Dozier.

**Guests:** Ron Miller, Denise Bilbow, Peggy Bielby (LCRDA staff); Melissa VanSickle (Broad and Cassel); Mark Frost, NAI Talcor.

1. Call to Order

Chair Anne Longman called the meeting to order at 11:05am.

2. Introduction of Guests

All present introduced themselves.

3. Modifications to Agenda

None.

4. Public Comment

None.

5. Approval of Draft Meeting Minutes

a. Board of Governors Meeting, October 6, 2016

*April Salter offered a motion to approve the October 6, 2016 Board of Governors meeting minutes. Dave Ramsay seconded the motion which passed unanimously*

6. Consent Agenda

a. Treasurer's Report

i. Report September/October

ii. Monthly Financial Report, September 2016

iii. Monthly Financial Report, October 2016

b. Executive Committee Report, November 3, 2016

c. Investments

i. Investment Advisory Committee Report, November 17, 2016

ii. Report, September 2016

iii. Report, October 2016

d. Audit Committee Report, November 3, 2016

- e. Jump Start Committee
  - i. Report, October 11, 2016
  - ii. Report, November 1, 2016
- f. Executive Director Compensation Adjustment

The Executive Committee requests ratification of its approval to increase the Executive Director's annual base salary \$6,000 (an approximately 4.65% increase) to \$135,000 per year retroactive to October 1, 2016.
- g. Internal Controls & Operating Procedures Changes

The Executive Committee requests ratification of its approval of a change to the Authority's Internal Control and Operating Procedures recommended by the Audit Committee. The changes include: a) directing an original monthly Bank Statement with check facsimiles be sent to the Executive Director for review, and b) clarifies related procedures. This procedure was previously performed by the Audit Committee Chair.
- h. Standard Office Lease and Personal Guaranty

The Executive Committee requests ratification of its approval of changes to the Standard Office Lease and the addition of a personal guaranty.
- i. Sensatek Propulsion Technology, Inc. Lease and Personal Guaranty

The Executive Committee requests ratification of its approval of a one-year lease with Sensatek Propulsion Technology, Inc. for Room 113 in the Knight Centre building through July 31, 2017, including a stipulation to accept changes to the insurance requirements as negotiated by the Executive Director. The lease is for 164 square feet at \$14.50 per square foot plus taxes, internet access, and copier usage charges.
- j. NWRDC Lease Modification

The Executive Committee requests ratification of its approval of a modification to the Authority's lease with FSU for NWRDC's space in the Morgan Building. The modification changes the lease to a month-to-month term with 90 days' written notice to terminate, and expands the space occupied by NWRDC from 2,314 sf to 4,003 sf.
- k. NWRDC/Danfoss Letter Agreement

The Executive Committee requests ratification of its approval of a Letter Agreement between the Authority, FSU, and Danfoss regarding NWRDC's use of Danfoss' furniture in space leased by NWRDC in the Morgan Building.
- l. Nanostrata Lease

The Executive Committee requests ratification of its approval of an amendment to the lease with Nanostrata in the Knight Administrative Centre Building, extending the lease for one year under the same terms and conditions.

*Dave Ramsay offered a motion to approve the consent agenda items. Eric Holmes seconded the motion which passed unanimously.*

- 1. Bing Energy Settlement Agreement

The Chair requests ratification of her approval of a settlement agreement between the Authority and Bing Energy. The agreement: 1) gives Bing Energy a license until February 15, 2017 for 24-hour access to remove its property; 2) allows Bing Energy to store its property in storage containers in the parking lot occupying no more than six parking spots, and the Authority agrees to the location of containers; 3) requires Bing Energy to mark and segregate any hazardous materials requiring special disposal; 4) requires Bing Energy to remove its property from the building by December 15, 2016, and from the parking lot by February 15, 2017; 5) if not removed from the parking lot by February 15, 2017, then the Authority has the right to dispose of the property without any further accounting or action by the court; 6) the Authority will have an “administrative claim” for \$32,610.80 for the 6-month license from August 15, 2016 to February 15, 2017 (the full monthly lease rate, prorated if Bing Energy leaves early) plus \$5,000 attorney’s fees. Administrative claims receive a higher priority in bankruptcy than do other unsecured claims. This settlement does not impact the Authority’s unsecured claims filed for rent and expenses incurred prior to the Bing Energy’s bankruptcy filing.

*April Salter offered a motion to ratify the settlement agreement. Keith Bowers seconded the motion, which passed unanimously. Kim Williams abstained from the vote.*

## 2. Lease Policy

Executive Committee requests ratification of its approval of a new policy 16-01 Lease Policy. The purpose of the policy is to delegate the authority of the Board of Governors to approve and execute certain leases or subleases for space in buildings owned by the Authority (collectively “Leases”) to the Executive Director of the Authority.

*After discussion, the Board of Governors suggested that the policy language addressing the definition of conflict of interest under 2.b.ii: include “or potential for gain” following the phrase “...or in which the Executive Director or any relative has a beneficial interest.” Dave Ramsay offered a motion to ratify the Executive Committee approval of the policy as modified. Eric Holmes seconded the motion which passed unanimously.*

## 3. Entrepreneurial Excellence Program (EEP) Director Agreement and Funding

Staff requests approval of an agreement with Larry Lynch to provide Program Director services related to conducting EEP Class 13 in March/April of 2017. The agreement is in the amount of \$20,000, and for the term from December 1, 2016 through May 31, 2017 to be paid \$3,333.33 per month. The agreement also requires that Mr. Lynch seek out additional funding opportunities to conduct future EEP classes. Further, staff requests approval to use \$20,000 of the Inkbridge Escrow Fund (IEF) to fund the amounts due under the agreement with Larry Lynch. The current balance of the IEF is \$55,000.

*The Board noted that any legislative funding request should be for a 3-year period, and requested that Larry Lynch present an overview of the program: its scope of work, history, operations, metrics, and successes at the next Board of Governors meeting. Dave Ramsay offered a motion to approve the agreement. Eric Holmes seconded the motion which passed unanimously.*

## 4. Jump Start Committee Status

Ron Miller provided an update on the Jump Start Committee members, meetings, objectives, and actions to date. Melissa VanSickle reported that the creation of a 501(c)(3) organization to support the incubator is proceeding.

5. Chair's Report

Chair Anne Longman reported that individual meetings with the Intergovernmental Agency members are underway. A trolley tour with key elected officials will be planned to provide information and an updated view of the Park. She encouraged Board of Governor members to share their thoughts and ideas for raising awareness of the Park with staff.

6. Staff Reports:

a. Executive Director's Report

Ron Miller reported that the Investment Advisory Committee decided to terminate any investment in the Florida Local Government Investment Trust, and move \$1 million from Florida Prime to the SPIA Fund up to the maximum amount of its cap, and if possible with any remaining amount, ladder CDs for higher return. Audit field work is complete, and fast-paced planning for Jump Start continues. An RFP for a new auditor will be drafted for early 2017. Dave Ramsay noted that the Authority has no issues with the existing auditor but that board practice suggests 3-year interval RFPs for most vendor contracts.

b. Director of Programs and Communications Report

Denise Bilbow reported that EEP rebranding is complete. EEP Class 12 graduates are already active in the community. E-month activities include a "My View" in the Tallahassee Democrat on November 19, 2016, and a Tech Topics held in Innovation Park on November 9, 2016. A full-page Florida Trend ad (FSU, FAMU, and the Authority are sharing the cost equally) will be published in the January 2017 edition. Three Knight Grant applications have been submitted. The Authority is working in coordination with the Mag Lab on several events.

c. Property Manager's Report

Mark Frost reported that Common Area Maintenance fee invoices for 2015-2016 have been sent out and will be collected by December 30, 2016.

7. New Business

Dave Ramsay noted that Danfoss Turbocor will have its opening next week, and will begin working on an additional expansion.

8. Adjourn

The meeting was adjourned at 1:05pm.

**Next Meeting: February 2, 2017**

(Subsequent meetings held the first Thursday of even numbered months.)

**Leon County Research and Development Authority**  
Treasurer's Report  
February 2, 2017

The following is a summary of the more significant items relating to financial position, financial operations, and the budget for the months ending November 30, 2016 and December 31, 2016 and the fiscal year-to-date for 3 months through December 31, 2016.

1) Balance Sheet

| <u>Changes for the month:</u>             | <u>Increase/ (Decrease)</u> |                 |
|---|-----------------------------|-----------------|
|   | <u>11/30/16</u>             | <u>12/31/16</u> |
| Operating cash <sup>1-3</sup>             | \$ 6,057                    | \$ 40,346       |
| Receivables <sup>1</sup>                  | \$ 5,777                    | (\$ 35,960)     |
| Accumulated depreciation and amortization | (\$ 24,897)                 | (\$ 24,897)     |
| Trust escrow <sup>2</sup>                 | 0                           | (\$ 20,000)     |
| Investments <sup>3</sup>                  | (\$ 5,063)                  | \$ 3,355        |
| Total assets                              | (\$ 16,616)                 | (\$ 42,003)     |
| Total liabilities                         | \$ 19,788                   | (\$ 22,893)     |
| Total capital                             | (\$ 36,404)                 | (\$ 19,110)     |

<sup>1</sup> 12/16 Receivables decrease due to collection of annual CAM charges; also, increased cash

<sup>2</sup> 12/16 Received funds from Trust Escrow for EEP funding; also, increased cash since funds will be paid out over 6 months

<sup>3</sup> 11/16 Liquidated FLGIT investment \$9,604; also, increased cash

2) Income Statement

|   | <u>Month</u>    |                 | <u>Year-to-Date</u> |
|---|-----------------|-----------------|---------------------|
|   | <u>11/30/16</u> | <u>12/31/16</u> |                     |
| Interest income   | \$ 3,257        | \$ 2,845        | \$ 10,697           |
| Net operating income (loss) <sup>4</sup><br><i>(before depreciation and amortization expense)</i> | (\$ 11,507)     | \$ 5,787        | (\$ 10,969)         |
| Less: Depreciation and amort. expense   | (\$ 24,897)     | (\$ 24,897)     | (\$ 74,690)         |
| Net income (loss)   | (\$ 36,403)     | (\$ 19,110)     | (\$ 85,659)         |

<sup>4</sup> 12/16 Installment payment of \$15,000 for annual audit

3) Cash Flow Statement

| <u>Operating Cash</u> |                   |
|-----------------------|-------------------|
| Beginning balance     | \$ 176,876        |
| Net change            | 46,404            |
| Ending balance        | <u>\$ 223,280</u> |

Operating cash is adequate to meet current cash disbursement needs.

#### 4) Budget Comparison Statement

##### a) Revenues:

| Revenue Variances Year-to-Date   |                 |
|----------------------------------|-----------------|
| Actual                           | \$ 172,355      |
| Budgeted                         | <u>165,638</u>  |
| Variance Favorable (Unfavorable) | <u>\$ 6,717</u> |

##### Variance breakdown:

|                                  |                 |
|----------------------------------|-----------------|
| Rent <sup>5</sup>                | \$ 4,241        |
| Interest income                  | 797             |
| EEP program revenue              | 1,600           |
| All other                        | <u>79</u>       |
| Variance Favorable (Unfavorable) | <u>\$ 6,717</u> |

<sup>5</sup>. Added NWRDC space and new Knight lease

##### b) Operating Expenses (before Depreciation and Amortization):

| Operating Expenses Year-to-Date  |                  |
|----------------------------------|------------------|
| Budgeted                         | \$ 204,465       |
| Actual                           | <u>183,324</u>   |
| Variance Favorable (Unfavorable) | <u>\$ 21,141</u> |

| Operating Expense Variances<br>(Year-to-Date) | Favorable/<br>(Unfavorable) |
|---|-----------------------------|
| Payroll                                       | (\$ 170)                    |
| Utilities                                     | 4,846                       |
| Repairs/Maintenance                           | 3,204                       |
| Cleaning & Improvements                       | 2,000                       |
| Services <sup>6</sup>                         | 4,704                       |
| Property Administration <sup>7</sup>          | <u>6,557</u>                |
| Total Favorable Variance                      | <u>\$ 21,141</u>            |

<sup>6</sup>. HVAC PM contract not yet completed; \$4,900 budgeted for the quarter

<sup>7</sup>. EEP program director contract was not completed until December which deferred two months budgeted expense (\$3,333 each)

Respectfully submitted,  
Dave Ramsay, Treasurer



**LEON COUNTY RESEARCH AND DEVELOPMENT AUTHORITY**

**INVESTMENT PORTFOLIO**

**For period ending November 30, 2016**

*For the Month:*

| <u>SECURITY OWNED</u> | <u>BALANCE BOM</u> | <u>EARNINGS</u> | <u>ADDITIONS</u> | <u>DEDUCTIONS</u> | <u>BALANCE EOM</u> | <u>YIELD</u>   |
|-----------------------|--------------------|-----------------|------------------|-------------------|--------------------|----------------|
| FL PRIME              | \$ 1,412,637.91    | \$ 991.66       | \$ -             | \$ -              | \$ 1,413,629.57    | 0.842%         |
| SPIA                  | 2,461,054.67       | 2,273.68        | -                | -                 | 2,463,328.35       | 1.129%         |
| FLGIT                 | <u>9,604.12</u>    | <u>(25.16)</u>  | <u>-</u>         | <u>9,578.96</u>   | <u>-</u>           | <u>-3.141%</u> |
|                       | \$ 3,883,296.70    | \$ 3,240.18     | \$ -             | \$ 9,578.96       | \$ 3,876,957.92    | 1.001%         |

*For the Fiscal Year Beginning October 1:*

| <u>SECURITY OWNED</u> | <u>BALANCE BOP</u> | <u>EARNINGS</u> | <u>ADDITIONS</u> | <u>DEDUCTIONS</u> | <u>BALANCE EOP</u> | <u>YIELD</u>   |
|-----------------------|--------------------|-----------------|------------------|-------------------|--------------------|----------------|
| FL PRIME              | \$ 1,411,609.01    | \$ 2,020.56     | \$ -             | \$ -              | \$ 1,413,629.57    | 0.859%         |
| SPIA                  | 2,457,505.63       | 5,822.72        | -                | -                 | 2,463,328.35       | 1.416%         |
| FLGIT                 | <u>9,604.84</u>    | <u>(25.88)</u>  | <u>-</u>         | <u>9,578.96</u>   | <u>-</u>           | <u>-1.616%</u> |
|                       | \$ 3,878,719.48    | \$ 7,817.40     | \$ -             | \$ 9,578.96       | \$ 3,876,957.92    | 1.209%         |

|   |                 |
|---|-----------------|
| <b>Investments Limited as to Use (Capital Improvement Fund)</b> | \$ 1,400,000.00 |
| <b>Unrestricted Investments</b>                                 | \$ 2,476,957.92 |

**NOTABLE ADDITIONS OR DELETIONS TO ACCOUNTS:**

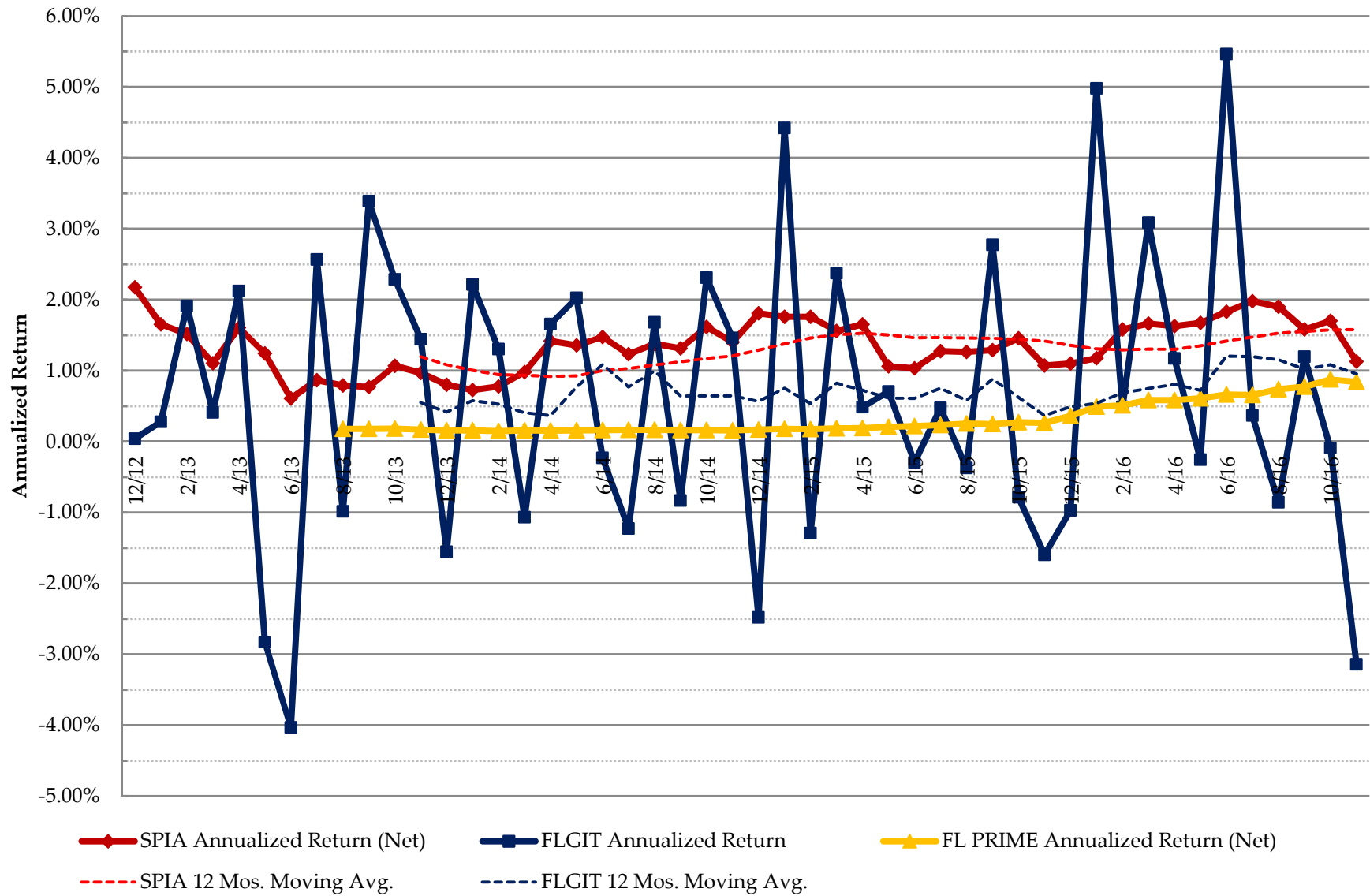
11/16 Liquidated remaining investment in FLGIT; funds held in operating cash account pending January 2017 decision regarding CD investments, and operating cash account requirements.

Note: Security descriptions shown on reverse

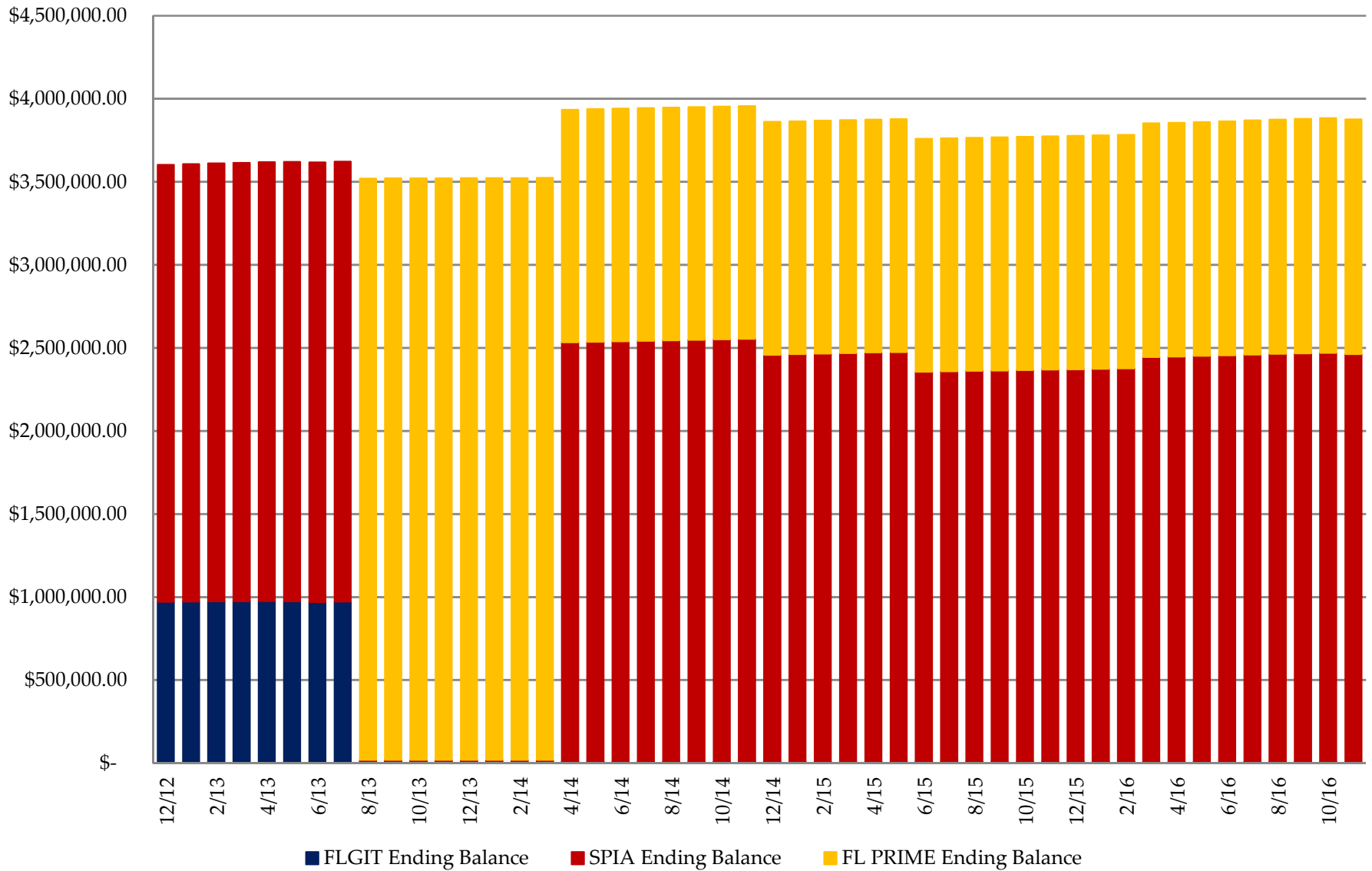
## SECURITY DESCRIPTIONS:

- **FL PRIME - SBA Florida Prime** - The Local Government Surplus Funds Trust Fund (Florida PRIME) was created by an Act of the Florida Legislature in 1977 and currently serves over 800 participants across the state. Invests exclusively in short-term, high-quality fixed-income securities rated in the highest short-term rating category by one or more nationally recognized statistical rating organizations, or securities of comparable quality. Seeks to maintain a \$1.00 value and maintain a weighted average maturity of 60 days or less, with the maximum maturity of any investment limited to 397 days. Rated AAAM by Standard & Poor's, the highest rating available for a local government investment pool. Complies with legislation that requires numerous operational and reporting enhancements, including restating investment objectives to emphasize safety, liquidity and competitive returns with minimization of risks; and providing for enhanced internal controls, transparency and communication. Federated Investors has managed the assets of Florida PRIME to the exact specifications of its investment policies since February 13, 2008.
- **SPIA – Florida Treasury Special Purpose Investment Trust** – The Florida State Treasury operates a special investment program for public entities other than the State. This program is authorized in Section 17.61(1), Florida Statutes and is called the Treasury Special Purpose Investment Account (SPIA). Component units of the State, Universities, or Colleges that are created by the Florida Constitution or Florida Statutes are eligible to invest in SPIA. Current non-component unit participants, like the Authority, are allowed to stay in the program with capped investment limits and a minimum balance equal to 60% of the previous 3 months average balance. Liquidations in excess of the minimum balance require 6 months' notice. SPIA funds are invested in the same portfolio as Treasury funds, so the pool of funds has a stable base of funds (over 85% of the funds are captive trust funds) not needed for immediate disbursement. These funds are invested in a combination of short-term liquid instruments and intermediate-term fixed income securities. This “barbell” investment strategy, along with incremental income produced by securities lending, has the ability to return higher yields than a typical money market fund. Participants have the ability to invest and obtain fund withdrawals same day with an 11:00 a.m. deadline for notifying the Treasury. The SPIA maintains a credit rating of A+f by Standard & Poor's.
- **FLGIT – Florida Local Government Investment Trust Government Fund** – The FLGIT is a local government investment pool created by the Florida Association of Court Clerks and Comptrollers, and the Florida Association of Counties for the purpose of providing public entities with an investment program that focuses on longer-term securities with the highest credit ratings. The effective maturity of the underlying investments is five years or less. The FLGIT invests in money markets, Treasury Notes, asset-backed securities, and federal agency obligations. This investment type is subject to some market risk due to fluctuating prices and liquidity risk due to advance redemption notification requirements. However, it has a professional investment advisor and an investment advisory board, and provides diversity in the Fund's portfolio. The FLGIT maintains a credit rating of AAA by Standard & Poor's.

## Leon County Research & Development Authority Investment Yield



## Leon County Research & Development Authority Investments Balances



**LEON COUNTY RESEARCH AND DEVELOPMENT AUTHORITY**

**INVESTMENT PORTFOLIO**

For period ending December 31, 2016

*For the Month:*

| <u>SECURITY OWNED</u> | <u>BALANCE BOM</u> | <u>EARNINGS</u> | <u>ADDITIONS</u> | <u>DEDUCTIONS</u> | <u>BALANCE EOM</u> | <u>YIELD</u> |
|-----------------------|--------------------|-----------------|------------------|-------------------|--------------------|--------------|
| FL PRIME              | \$ 1,413,629.57    | \$ 1,080.93     | \$ -             | \$ -              | \$ 1,414,710.50    | 0.918%       |
| SPIA                  | 2,463,328.35       | 1,745.57        | -                | -                 | 2,465,073.92       | 0.835%       |
| FLGIT                 | -                  | -               | -                | -                 | -                  | 0.000%       |
|                       | \$ 3,876,957.92    | \$ 2,826.50     | \$ -             | \$ -              | \$ 3,879,784.42    | 0.875%       |

*For the Fiscal Year Beginning October 1:*

| <u>SECURITY OWNED</u> | <u>BALANCE BOP</u> | <u>EARNINGS</u> | <u>ADDITIONS</u> | <u>DEDUCTIONS</u> | <u>BALANCE EOP</u> | <u>YIELD</u> |
|-----------------------|--------------------|-----------------|------------------|-------------------|--------------------|--------------|
| FL PRIME              | \$ 1,411,609.01    | \$ 3,101.49     | \$ -             | \$ -              | \$ 1,414,710.50    | 0.878%       |
| SPIA                  | 2,457,505.63       | 7,568.29        | -                | -                 | 2,465,073.92       | 1.222%       |
| FLGIT                 | 9,604.84           | (25.88)         | -                | 9,578.96          | -                  | -1.616%      |
|                       | \$ 3,878,719.48    | \$ 10,643.90    | \$ -             | \$ 9,578.96       | \$ 3,879,784.42    | 1.098%       |

|   |                 |
|---|-----------------|
| <b>Investments Limited as to Use (Capital Improvement Fund)</b> | \$ 1,400,000.00 |
| <b>Unrestricted Investments</b>                                 | \$ 2,479,784.42 |

**NOTABLE ADDITIONS OR DELETIONS TO ACCOUNTS:**

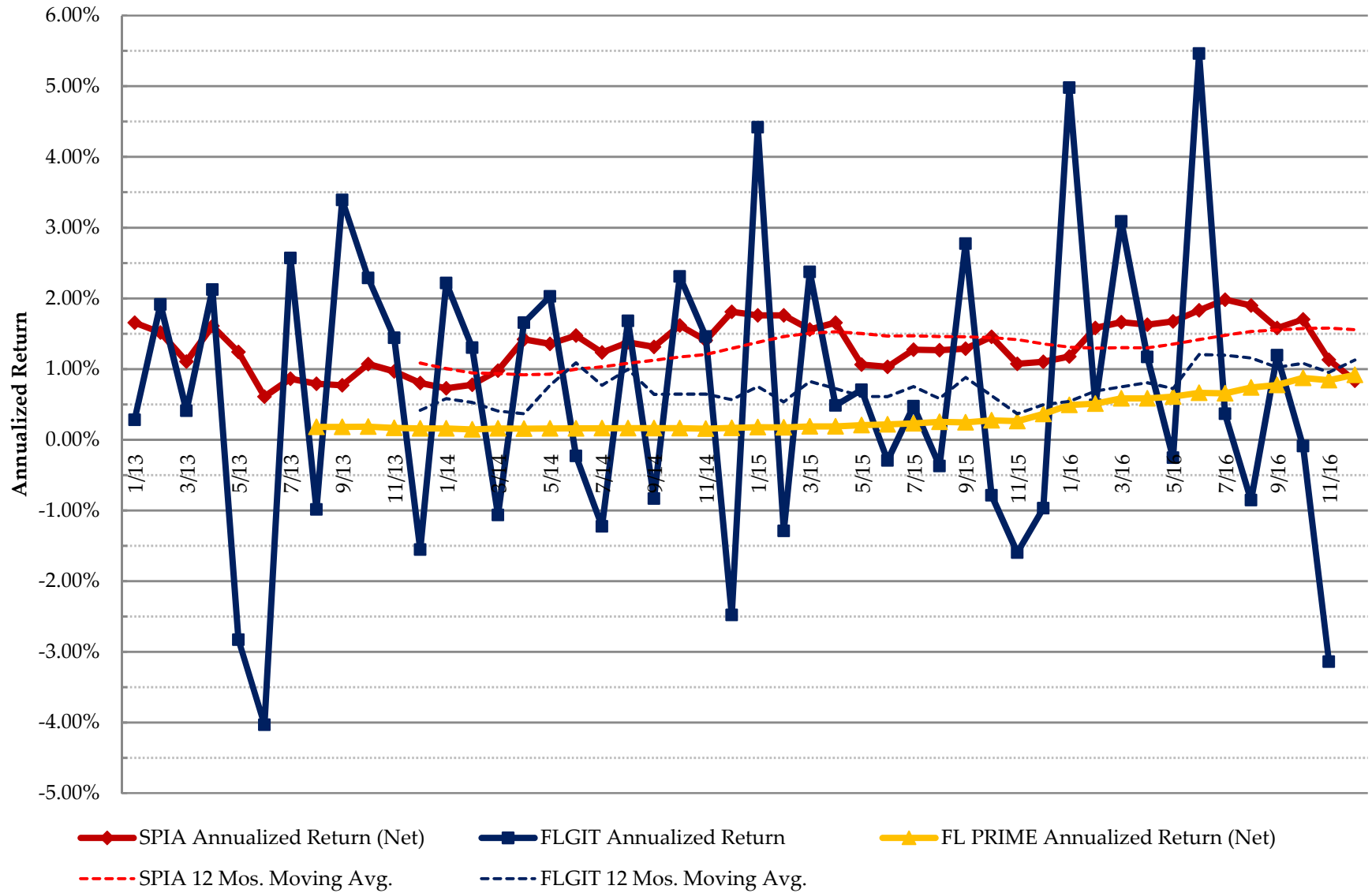
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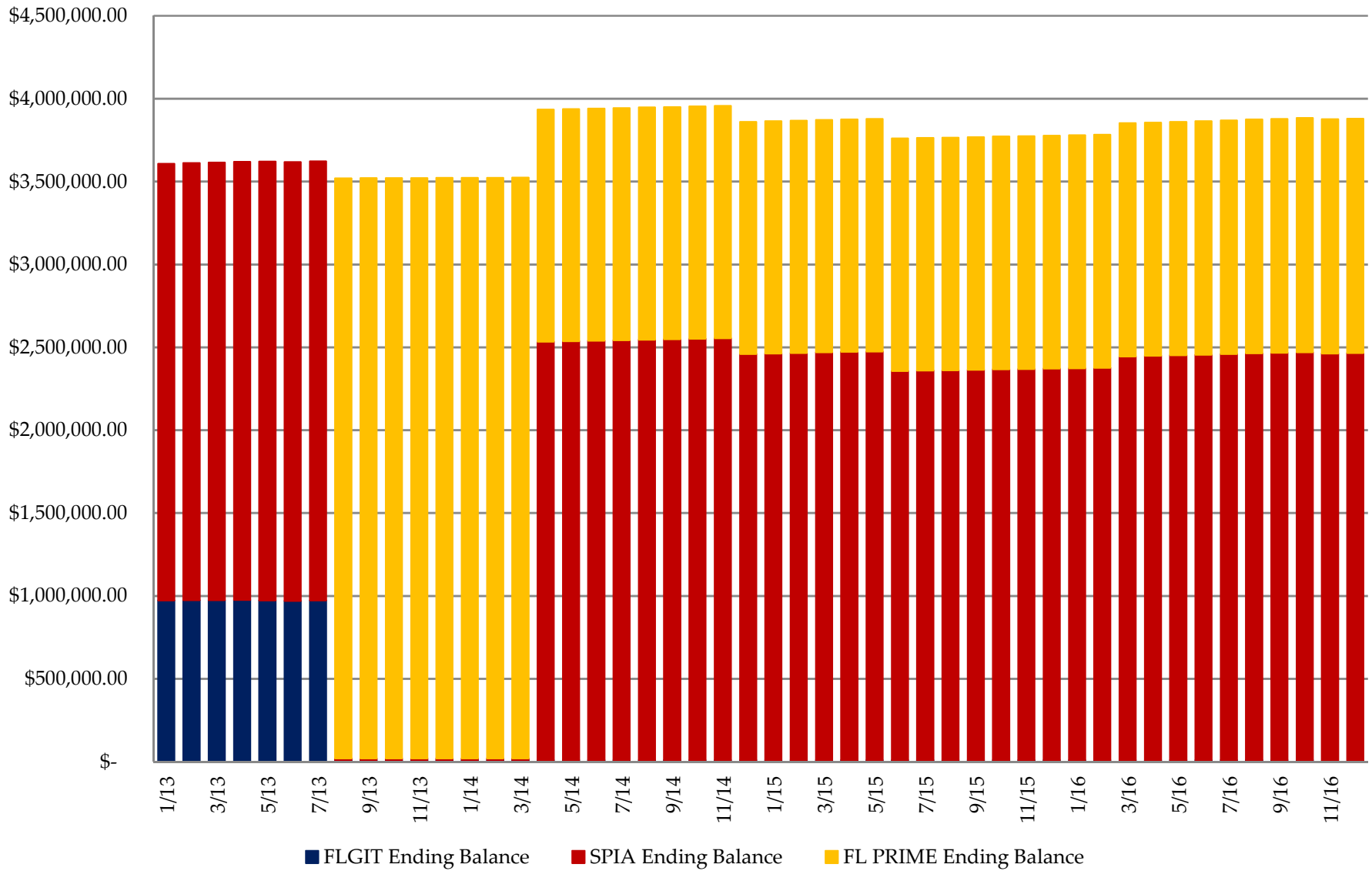
## **SECURITY DESCRIPTIONS:**

- **FL PRIME - SBA Florida Prime** - The Local Government Surplus Funds Trust Fund (Florida PRIME) was created by an Act of the Florida Legislature in 1977 and currently serves over 800 participants across the state. Invests exclusively in short-term, high-quality fixed-income securities rated in the highest short-term rating category by one or more nationally recognized statistical rating organizations, or securities of comparable quality. Seeks to maintain a \$1.00 value and maintain a weighted average maturity of 60 days or less, with the maximum maturity of any investment limited to 397 days. Rated AAAM by Standard & Poor's, the highest rating available for a local government investment pool. Complies with legislation that requires numerous operational and reporting enhancements, including restating investment objectives to emphasize safety, liquidity and competitive returns with minimization of risks; and providing for enhanced internal controls, transparency and communication. Federated Investors has managed the assets of Florida PRIME to the exact specifications of its investment policies since February 13, 2008.
- **SPIA – Florida Treasury Special Purpose Investment Trust** – The Florida State Treasury operates a special investment program for public entities other than the State. This program is authorized in Section 17.61(1), Florida Statutes and is called the Treasury Special Purpose Investment Account (SPIA). Component units of the State, Universities, or Colleges that are created by the Florida Constitution or Florida Statutes are eligible to invest in SPIA. Current non-component unit participants, like the Authority, are allowed to stay in the program with capped investment limits and a minimum balance equal to 60% of the previous 3 months average balance. Liquidations in excess of the minimum balance require 6 months' notice. SPIA funds are invested in the same portfolio as Treasury funds, so the pool of funds has a stable base of funds (over 85% of the funds are captive trust funds) not needed for immediate disbursement. These funds are invested in a combination of short-term liquid instruments and intermediate-term fixed income securities. This “barbell” investment strategy, along with incremental income produced by securities lending, has the ability to return higher yields than a typical money market fund. Participants have the ability to invest and obtain fund withdrawals same day with an 11:00 a.m. deadline for notifying the Treasury. The SPIA maintains a credit rating of A+f by Standard & Poor's.
- **FLGIT – Florida Local Government Investment Trust Government Fund** – The FLGIT is a local government investment pool created by the Florida Association of Court Clerks and Comptrollers, and the Florida Association of Counties for the purpose of providing public entities with an investment program that focuses on longer-term securities with the highest credit ratings. The effective maturity of the underlying investments is five years or less. The FLGIT invests in money markets, Treasury Notes, asset-backed securities, and federal agency obligations. This investment type is subject to some market risk due to fluctuating prices and liquidity risk due to advance redemption notification requirements. However, it has a professional investment advisor and an investment advisory board, and provides diversity in the Fund's portfolio. The FLGIT maintains a credit rating of AAA by Standard & Poor's.

## Leon County Research & Development Authority Investment Yield



## Leon County Research & Development Authority Investments Balances





# Leon County Research and Development Authority

## Policy No. 11-5

Title: Investment Policy  
Date Adopted: October 4, 2011  
Revised: August 7, 2013; December 4, 2014; September 3, 2015; February 2, 2017  
Effective Date: ~~October 1, 2015~~ February 2, 2017

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### **Introduction**

The purpose of Policy No. 11-5, “Investment Policy,” is to set forth the framework within which The Leon County Research and Development Authority (“the Authority”) will manage investment assets belonging to the Authority.

The Authority’s Board of Governors (“the Board”) is responsible for setting guidelines for the investment of the Authority’s portfolio through the adoption of this Investment Policy. The Board has established the Investment Advisory Committee (“the Committee”) to provide oversight of this Investment Policy. ~~and The Committee’s purpose, authority, composition, qualifications for members, meetings, and responsibilities are further defined by the Committee Charter approved by the Board. charged it with the responsibility of reviewing and recommending changes to the Policy no less than annually. The Committee meets semi-annually unless interim issues require more frequent meetings. Meetings are noticed and open to the public; and, the minutes of each meeting are recorded. The Committee, appointed by the Chair of the Authority’s Board, consists of at least one Board member and qualified citizens with financial or investment expertise who are independent of employment and business relationships with the Authority. The Chair of the Committee will be appointed by the Chair of the Authority and must be a member of the Authority’s Board of Governors.~~

### **I. Scope**

This policy shall apply to all funds held by the Authority in excess of those required to meet current expenses and shall be in compliance with Section 218.415, Florida Statutes.

## **II. Objectives**

The objectives of the Authority Investment Policy, in order of priority, are to provide safety of capital (preservation of the real value), liquidity of funds, and competitive net returns. For funds held with the expectation of expenditure within 6 months, the principal investment objective shall be preservation of the real value (i.e. inflation-adjusted value) of capital. For funds held with the expectation of expenditure beyond 6 months, capital may be invested subject to moderate levels of interest rate risk, credit risk and liquidity risk, and minimal levels of other forms of risk, provided that the Authority has reasonably determined that the expected return premium associated with these risks is sufficiently high to warrant the investment. The optimization of investment returns shall be secondary to the requirements for safety and liquidity.

## **III. Performance Measurement**

The State Board of Administration's Local Government Surplus Funds Trust Fund (Prime Fund) will be used as a benchmark for funds invested with the expectation of expenditure within 6 months. For funds invested with the expectation of expenditure beyond 6 months, the benchmark shall be an index comprised of US Treasuries or Government securities as set by the Committee. The externally managed intergovernmental pools each specify a benchmark appropriate for the pool.

## **IV. Prudence and Ethical Standards**

The primary standard for investment of the Authority's assets shall be the Prudent Person Rule, which states that "Investments should be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion, and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived from the investment."

Officers, employees, investment managers and advisor vendors of the Authority who are involved in the investment process shall refrain from personal business activity that could conflict with State Statutes, resolutions, proper management of the investment portfolio or which could impair their ability to make

impartial investment decisions. Investment officials and employees, including members of the Committee, shall disclose any material financial interests in any investment firms, or financial institutions that conduct business with the Authority and shall refrain from undertaking personal investment transactions with the same individual with whom business is conducted on behalf of the Authority.

## V. Authority

Responsibility for the investment program is vested with the Committee. The Executive Director shall assist the Committee by maintaining an Investment Procedures and Internal Controls Manual based on this Policy. The Authority may retain one or more professional organizations, as investment manager(s), to manage the portfolio under the guidance of these policies and the Authority's Committee, and may also retain the services of investment advisor(s). The Executive Director shall perform the duties and responsibilities of the investment manager in the event an investment manager is not retained by the Authority. No person may engage in an investment transaction except as stated in the Internal Controls Section of this Policy.

The investment manager(s) shall have substantial discretion in the management of the investments within the defined objective range. The investment manager(s) is expected to optimize the Authority's expectations. The investment manager(s) and investment advisor(s) serve at the will of the Authority's Board of Governors, subject to the specific terms of contracts between the parties. Yield or growth targets, if any, established by the Authority shall be implemented by, and used in the performance evaluation of, the manager(s).

The investment manager(s) and investment advisor(s) will provide the Committee with reports in sufficient detail as may be requested by the Committee in order for them to review the performance of the portfolio. The Committee will establish portfolio benchmarks in order to judge the performance of the internally managed portfolio with respect to the market and other portfolios of similar size and limitations. The Committee will provide the Board a report at the close of the fiscal year recapping the performance of the portfolio and any outside managers, and at such other times as the Board may request.

## **VI. Investment Manager(s)**

The duties and responsibilities of the investment manager(s) are to:

- Exercise discretion in the management of the assets under its control in accordance with the Investment Policy objectives and guidelines and also expressed in separate written agreements.
- Comply with all applicable state and federal laws, rules, regulations and fiduciary prudence, and due diligence requirements.
- Promptly inform the Committee in writing regarding all significant and/or material matters and changes pertaining to the investment of assets or the ownership, management or financial stability of the investment management firm.
- Recommend to the Committee changes, additions or deletions to the Investment Policy as deemed advisable.
- Promptly vote all proxies and related actions in a manner consistent with the long-term interests and objectives of the Authority, including the responsibility to vote proxies related to the investment manager's proprietary investment funds held, unless voting responsibility has been reserved in writing to the Committee or its designee. The manager(s) has the right hereunder to solicit proxy voting recommendations from an independent qualified party, on matters that might involve potential conflicts of interest in the performance of the manager's duties hereunder.
- Acknowledge in writing the receipt of this Policy and acceptance of its terms.

## **VII. Investment Advisor(s)**

The Committee, with the Board's consent, is authorized to hire an investment advisor on an as needed basis and the duties and responsibilities of the investment advisor(s) shall consist of the following, but are not limited to: participation in the selection, monitoring the performance of, and generally supervising any investment manager(s). The investment advisor shall also provide reports to the Committee, Executive Director, and Board of Governors.

## VIII. Authorized Investments

Investments should be made subject to the cash flow needs of the Authority; and such cash flows are subject to revisions as market conditions and the Authority's needs change. However, when the invested funds are needed in whole or in part for the purpose originally intended or for more optimal investments, authorized staff-- with the approval of the Committee, the Authority's Executive Committee, or Board Chair -- may direct the sale of the investment at the then-prevailing market price and place the proceeds into the proper account at the Authority's custodian.

The following are the guidelines for authorized investments and the limits on security types, issuers, and maturities that will be established by the Committee. The Committee shall have the option to further restrict investment percentages from time to time based on market conditions. The percentage allocations requirements for investment types and issuers are calculated based on the original cost of each investment. Investments not listed in this policy are prohibited.

The Authority shall invest in the following authorized instruments at the prevailing market prices or rates, subject to the limitations of Section 218.415 (16), Florida Statutes:

- A. The following intergovernmental investment pools authorized by Section 163.01 Florida Statutes:
  - 1. Local Government Surplus Trust Fund (Florida Prime)
  - 2. Treasury Special Purpose Investment Account (SPIA)
  - 3. Florida Local Government Investment Trust (FLGIT)
  - 4. Florida Municipal Investment Trust (FMIVT)
- B. Savings accounts in state-certified qualified public depositories as defined by Section 280.02, Florida Statutes.
- C. Certificates of deposit in state-certified qualified public depositories as defined by Section 280.02, Florida Statutes.
- D. Constant Net Asset Value Money Market Mutual Funds, which include U.S Government securities, repurchase Agreements, Commercial Paper and Bankers' Acceptances.  
Investments may be made in SEC qualified constant net asset value fixed income money

market mutual funds rated AAAM or AAAG comprised of only those investment instruments as authorized in this section policy, provided that such funds do not allow derivatives.

- E. Repurchase Agreements comprised of only those investments as authorized in this policy and based on the requirements set forth in the Master Repurchase Agreement.
  - 1. All firms with whom the Authority enters into repurchase agreements will have in place and executed a Master Repurchase Agreement.
  - 2. All repurchase agreements with a term longer than one business day will have the collateral held by a third party custodian. The collateral held pursuant to a repurchase agreement shall have a maturity of less than five years and must have a mark-to-market value of 102 percent during the term of the repurchase agreement.
- F. Bankers' Acceptances which are inventory based and issued by a bank, which has at the time of purchase, an unsecured, uninsured and un-guaranteed obligation rating of at least "Prime-1" and "A" by Moody's and "A-1" and "A" by Standard & Poor's.
- G. Commercial Paper of any United States company, which is rated at the time of purchase, "Prime-1" by Moody's and "A-1" by Standard & Poor's (prime commercial paper).
- H. United States Government Securities including, but not limited to: Treasury and Cash Management Bills, State and Local Government Series (SLGS), Notes, Bonds Treasury Strips, and Treasury Inflation Protected Securities (TIPS).
- I. United States Federal Agencies - Investments may be made in bonds, debentures or notes issued or guaranteed by United States Government agencies, provided such obligations are backed by the full faith and credit of the United States Government.
- J. Federal Instrumentalities - Investments may be made in bonds, debentures or notes issued or guaranteed by the United States Government sponsored agencies (Federal Instrumentalities), which are non-full faith and credit agencies.
- K. Corporate Debt Securities - Investments may be made in notes, medium term notes, discount notes and variable-rate securities issued by any corporation, provided that such instrument is rated A or better by at least two Nationally Recognized Statistical Rating Organizations (NRSRO) at time of purchase. All corporate transactions must be payable in U.S. dollars.
- L. Municipal Bonds - Investments may be made in notes or bonds issued by governmental entities or territorial boundaries of the United States, provided that such instrument is rated A or better by at least one NRSRO.

**IX. Maturity and Liquidity Requirements**

The investment portfolio is structured in such a manner as to provide sufficient liquidity to pay obligations as they come due. To that end, investments will be made to match investment maturities with known cash flow needs and anticipated cash-flow requirements. Investment of current operating funds shall have maturities of no longer than twenty-four (24) months.

Investments of non-operating funds (core funds) shall have a term appropriate to the need for the funds. The purchase of investments for core funds with maturities longer than three (3) years requires Committee approval before purchase.

**X. Risk and Diversification**

Assets shall be diversified to the extent practicable to control the risk of loss resulting from over concentration of assets in a specific maturity, issuer, instrument, dealer, or bank through which financial instruments are bought and sold. Diversification strategies within the established guidelines shall be reviewed and revised periodically, as deemed necessary by the Committee. The structure of the portfolio is designed to minimize credit risk.

The majority of the securities held will be those of the highest available credit quality ratings. These would include government pools, U. S Government (AAA) securities, and commercial paper, of only the highest applicable rating. Should an investment rating be downgraded to below investment grade, the status of the funds in question will be reviewed by the Committee to determine the costs associated with risk and the benefits that may still be yielded.

For purposes of this Policy, the top nationally-recognized statistical rating organizations (NRSROs) for all credit-sensitive securities are Moody's Investor Services, Standard and Poor's, and Fitch Investor Services.

**XI. Authorized Investment Institutions and Dealers**

The investment manager(s) shall only purchase securities from financial institutions, which are qualified as public depositories by the Treasurer of the State of Florida or from institutions designated as "Primary Securities Dealers" by the Federal Reserve Bank of New York.

**XII. Internal Controls**

Included in any periodic financial review by an independent auditor will be an examination of the written system of internal controls and operational procedures established by the Executive Director and approved by the Board. The internal controls shall be designed to prevent losses of funds which might arise from fraud, employee error, and misrepresentation by third parties, or imprudent actions by employees of the Authority.

Such controls shall include, but not be limited to, the following:

- A. The function of authorizing or performing investment transactions will be separated from the function of recording the transaction.
- B. Confirmation. All telephone or other electronically initiated transactions will be supported by written communications and approved by a person other than the person initiating the transaction. Repetitive wires do not require a secondary approval; however, all non-repetitive wires shall have secondary approval.
- C. All securities purchased or sold will be transferred only under the "deliver versus payment" (DVP) method to insure that funds or securities are not released until all criteria relating to the specific transaction are met.
- D. The Executive Director will accept, on behalf of and in the name of the Authority, bank trust receipts or confirmations as evidence of actual delivery of the obligations or securities in return for investment of funds.
- E. Trust receipts or confirmations shall fully describe the various obligations or securities held. The receipt or confirmation shall state that the investment is held in the name of the Authority.
- F. The actual obligations or securities, whether in book-entry or physical form, on which trust receipts or confirmations are issued, may be held by a third-party custodial bank and/or



institution or a designated correspondent bank which has a correspondent relationship to the Authority's third-party custodian.

**XIII. Reporting**

The investment manager(s) and investment advisor(s) are responsible for preparing periodic reports for submission to the Committee and Board. These reports shall include securities in the portfolio by class or type, book value, income earned, and market value as of the report date as well as comparisons of their performance with agreed upon benchmarks. Such reports shall be available to the public.

**XIV. Sale of Securities**

When invested funds are needed in whole or in part for the purposes originally intended, the investment manager(s) may sell such investments at the then-prevailing market price and place the proceeds into the proper account or fund of the Authority.

**XV. Preemption**

Any provision of any special act, municipal charter, or other law which prohibits or restricts the Authority from complying with Section 218.415, Florida Statutes, or any rules under Section 218.415, Florida Statutes, is void to the extent of the conflict.

**XVI. Audits**

Certified public accountants conducting audits of the Authority pursuant to Section 11.45, Florida Statutes, shall report as part of the audit, whether or not the Authority has complied with Section 218.415, Florida Statutes.

**XVII. Adoption of Investment Policy**

This Investment Policy was adopted by the Leon County Research and Development Authority's Board of Governors on October 4, 2011, and revised August 7, 2013, December 4, 2014, and October 1, 2015.

Approved \_\_\_\_\_

Anne Longman, Chair

\_\_\_\_\_ Date

Board of Governors

**Investment Manager’s Certification**

I have read, understand and agree to abide by the requirements of this policy.

**Accepted:** \_\_\_\_\_

**Signature**

**Date**

\_\_\_\_\_

**Print Name**

\_\_\_\_\_

**Name of Investment Firm**

**Investment Advisory Committee**  
**Leon County Research and Development Authority**

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**Investment Advisory Committee Charter**

**Purpose**

The primary purposes of the Investment Advisory Committee are to:

1. Assist the Board with review and oversight of the Authority's investment policy, objectives, guidelines and investment performance;
2. Provide recommendations to the Board on major investment objectives, strategies and policies; and,
3. Oversee the Authority's investment consultants and/or fund managers.

**Authority**

The Investment Advisory Committee shall have the resources and appropriate authority to interview consultants and/or fund managers and recommend its selection(s) of such to the Board for its ratification. Its recommendation to the Board will include fees and terms of service.

**Composition**

The Investment Advisory Committee shall consist of at least three members, but no more than seven, with at least one member being a member of the Board of Governors. Non-board members may serve on the Committee, but may not serve as the Committee Chair. The Authority shall request the Finance Director for the Leon County Clerk of the Circuit Court and Comptroller or his/her designee serve on the Committee in a non-voting capacity. The Board Chair shall appoint the Committee Chair from among Board members serving on the committee. The Committee Chair shall nominate individuals for committee membership. Nominated individuals shall have investment or related financial management experience. The Board Chair's appointments for non-board members must be in writing.

**Qualifications for Committee Members**

Each member of the Investment Advisory Committee must have investment experience and be financially literate. Members are expected to have:

1. A general understanding of investment principles, strategies, transactions, and performance criteria;
2. Experience with and understanding of investment statements and reports;
3. Experience with investment consultants and/or fund managers; and,
4. A general understanding of investment markets

## **Meetings**

The Committee shall meet annually in November, or upon call of the Committee Chair as circumstances require. The Committee will invite Board members, investment advisors, fund managers, or others to attend meetings and provide pertinent information as necessary. Meeting agendas will be prepared in advance, along with appropriate briefing materials. Minutes will be prepared for approval. Meetings will be conducted in accordance with provisions of Florida's Sunshine laws.

## **Responsibilities**

The Committee will carry out the following responsibilities:

1. Review the Authority's investment policy, objectives and guidelines, including risk tolerance, at least annually, presenting to the Board recommendations for any additions, deletions or modifications;
2. Develop selection criteria and recommend to the Board the selection and termination of the Authority's investment consultants and/or fund managers;
3. Review the performance of the investment portfolios, the investment consultants and fund managers and take appropriate action as necessary;
4. Conduct a formal review of the consultants and/or fund managers at least every two years;
5. Regularly report to the Board of Governors about Committee activities, issues, and related recommendations;
6. Perform other activities that may from time to time be delegated to the Committee by the Board of Governors; and
7. Review and assess the adequacy of the Investment Advisory Committee Charter annually requesting Board approval for proposed changes.

Adopted by the Board of Governors, May 10, 2011  
Revised August 7, 2013, October 2, 2014, and June 2, 2016.

**Leon County Research and Development Authority  
Jump Start Committee Meeting**

Thursday, December 15, 2016  
Knight Administrative Centre  
1736 W Paul Dirac Drive, Tallahassee, FL 32310

**Report**

**Members in Attendance:** Kristin Dozier, Reis Alsberry (joined the meeting at 3:10pm), Dustin Daniels (joined the meeting at 3:18pm), Domenick Eanniello, Eric Holmes, Wendy Plant (left the meeting at 4:43pm), David Ramsay, Mary Jo Spector, Lawrence Tinker (left the meeting at 3:58pm), Barbara Wescott.

**Members not in Attendance:** None.

**Guests:** Ron Miller, Denise Bilbow, Peggy Bielby (LCRDA staff)

1. Call to Order

Chair Kristin Dozier called the meeting to order at 3:05pm

2. Introduction of Guests

None.

3. Modifications to the Agenda

None.

4. Public Comment

None.

5. Approval of the draft minutes

*Dave Ramsay offered a motion to approve the October 11, 2016 and November 1, 2016 Jump Start Committee meeting minutes. Eric Holmes seconded the motion which passed unanimously.*

6. Updated Lean Business Model Canvas

Ron Miller explained the LBMC has been updated based on discussions with potential clients and the survey results, and the Target Client (2) and Key Activities (3) components have been revised accordingly.

7. Survey and Prospective Client Interview Review/Discussion

Ron Miller reported that there were 21 respondents to the survey, 11 of whom are prospective clients, and reviewed and discussed the results. Ron Miller stated that the survey responses regarding shared equipment generally corresponded to the prior findings of the 2015 Feasibility Needs Assessment Report. An advisory board and admissions committee will use admission standards, oversee and enforce benchmarks, and maintain graduation requirements. Program management will help with planning, space availability, and recruitment. Approximately 12-20 volunteers will be needed to mentor, and to provide services and program support.

8. Shared Equipment Requirements Discussion

A list compiled by Lawrence Tinker sets forth the general needs for all labs, as well as specifically for biotech and engineering labs. The next steps are determining the core equipment needs and the purchasing options, including available university resources. Cost, demand, use, space: all determine what will be useful for the minimum viable core equipment product.

9. University Resources Requirements List and Access Procedures Discussion

Ron Miller presented a list of existing FSU labs, facilities, and other resources, and discussed the relationships with FSU and FAMU, plus the other items to consider, such as library/database/web access, rates/fee structure, scheduling, and marketing.

10. Facility Space Plan Concept Discussion

Mary Jo Spector presented an overview of the Collins Building planning process: conditions assessment and building capabilities determination. The conditions assessment includes the building's current condition, how much is reasonable to spend, code and regulatory compliance needed, and site assessment: hardscaping, landscaping, drainage, signage, exterior, structure, systems. The building capabilities determination includes assessing the overall goal, cost, flexibility, usage, space, renovation concepts and possible phasing. Cost, quality, and square footage are the three primary objective components to balance.

11. Architectural and Engineering Contract Discussion

A full building assessment by an architectural and engineering firm can be initiated with the information gathered to date. The AE firm will take the concept and provide a study with several variations that capture the intent, allow phasing, and provide a cost estimate. Four to six months is reasonable to finalize the AE assessment and concept drawings. Finalizing the specifics of the space needs and allocation should occur simultaneously by the committee. The committee will then use the AE assessment and determine the final option to implement. Once the concept is finalized, the construction drawings will be completed within 3-6 months, and then permitting process begins, followed by construction. A total of 18 months is likely needed achieve to the finished product. It will be an iterative process to reach the optimal desired result. Ron Miller explained that using a Leon County continuing service contracted AE firm will avoid the necessity of doing an RFP.

12. New Business

Ron Miller reported he is still receiving inquiries regarding donations or sponsorships. Creation of a 501(c)(3) foundation is underway.

13. Adjourn.

The meeting adjourned at 5:05pm.

**Next Meeting: Tuesday, January 17, 2017**

3:00 – 5:00pm

Knight Administrative Centre, 1736 W Paul Dirac Dr 32310

**Leon County Research and Development Authority**  
**Jump Start Committee Meeting**  
Tuesday, January 17, 2017  
Knight Administrative Centre  
1736 W Paul Dirac Drive, Tallahassee, FL 32310

**Report**

**Members in Attendance:** Kristin Dozier, Domenick Eanniello, Eric Holmes, Wendy Plant (left the meeting at 4:35pm), David Ramsay, Mary Jo Spector, Lawrence Tinker, Barbara Wescott.

**Members not in Attendance:** Reis Alsberry, Dustin Daniels

**Guests:** Lucas Lindsey, Executive Director, Domi Station; Ron Miller, Denise Bilbow, Peggy Bielby (LCRDA staff)

1. Call to Order

Chair Kristin Dozier called the meeting to order at 3:05pm

2. Introduction of Guests

Kristin Dozier introduced Lucas Lindsey

3. Modifications to the Agenda

Ron Miller noted that the Sales and Marketing agenda item will be a) Sales and Marketing Plan discussion, b) Branding

4. Public Comment

None.

5. Approval of the draft minutes

*Dave Ramsay offered a motion to approve the December 15, 2016 Jump Start Committee meeting minutes. Domenick Eanniello seconded the motion which passed unanimously.*

6. Updated Lean Business Model Canvas

Ron Miller explained the LBMC has been updated as a result of the last meeting discussions: (4) Key Resources and the (2) Target Client components; (5) Marketing Plan, (6) Sales Plan, and (7) Key Partners will be discussed later in the meeting.

7. Key Partners Discussion

What sort of partners will make us efficient and effective? Domi, Jim Moran Institute, schools are sources both for entrepreneurs, but also for mentors, programs, education, and training components. Formalizing strategic partnership relationships will help when seeking funding.

Lucas Lindsey presented a video highlighting Domi's mission, history, operations, and programs. Domi's space is more IT oriented, with no wet or dry labs. For tech transfer and research commercialization Domi is well-positioned to partner with Innovation Park's incubator, particularly Domi's "TCAP" (Technology Commercialization Accelerator Program) begun in 2015. Utilizing a DOMI program for Jump Start clients, at least initially, makes sense. A needs



assessment will determine the best approach for each client. Ron Miller summarized that key partnerships make sense to effect a speedy start up and sharing of expertise and expenses, but our individual brand has to be distinct.

8. Sales and Marketing

a) Marketing: Eighteen marketing questions focused on potential clients but also apply to potential partners/sponsors/stakeholders. Marketing means how we reach potential clients and get the word out. “Product” is services, and we will need impact tracking to demonstrate the program benefits. “Price” structure includes rent charged and free space made available. “Place” is a component of how much will be spent on the facility and the quality. “Promotion” will include social media. “People” will determine what type of staff.

b) Sales: Initial step: identifying the new clients: via EEP or other programs, the needs assessment and formalizing the entry criteria and evaluating where they are and whether they are coachable. Subsequent steps: for existing clients: promotion in the community, coaching and evaluating. For all clients: exit criteria: clients cannot stay indefinitely, although anchor tenants have a value. The Advisory Board will create and enforce both entry and exit evaluations.

Possible names: Committee members should submit any name ideas for the facility to LCRDA staff. Board of Governors member April Salter will be consulted also.

Denise Bilbow reported that the Innovation Park website incubator landing page is live, and will be revised and expanded as the project progresses and develops.

9. Architectural and Engineering (A&E) update

Ron Miller and Mary Jo Spector met with Cam Whitlock of Lewis + Whitlock, PA regarding the proposal for A&E study as discussed last meeting. The firm has a continuing service agreement with Leon County, so an RFP is not required. The proposal should be ready in one week, the chair can sign the contract with Lewis + Whitlock, and then it will be 6-8 weeks for the final A&E assessment.

10. Economic Development Administration (EDA) visit update

Kristin Dozier reported that she and Ron Miller met with the U.S. Department of Commerce, EDA’s Florida representative Greg Vaday who was encouraging regarding applications for EDA grant funding for construction. He will serve as a resource for funding requests, and the applications are accepted on a rolling basis.

11. Next Steps

A&E/LBMC: Building a business plan/self-sustaining financial model and budget.

12. New Business

Creation of a 501(c)(3) foundation is underway.

13. Adjourn.

The meeting adjourned at 5:10pm.

**Next Meeting: TBD**

## **SERVICE AGREEMENT**

This Service Agreement (“Service Agreement”) is entered this \_\_\_\_ day of February, 2017 (the “Effective Date”), by and between the **LEON COUNTY RESEARCH AND DEVELOPMENT AUTHORITY**, of the County of Leon and State of Florida (“LCRDA”) and **ARCHITECTS LEWIS + WHITLOCK** (“Architect”).

### **Recitals**

A. Architect and Leon County, a charter county and political subdivision of the State of Florida (“County”) are parties to that certain Agreement effective October 23, 2014 (“County Contract”), which, together with all exhibits to the County Contract is incorporated herein by reference.

B. Pursuant to paragraph XII of the Solicitation Document attached as Exhibit A to the County Contract, LCRDA may engage Architect’s services pursuant to the terms and conditions of the County Contract.

C. LCRDA desires to retain Architect to provide certain services to LCRDA and Architect desires to perform the services for LCRDA, all under the terms and conditions of the County Contract and as set forth below.

Now therefore, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto have agreed, and do hereby agree as follows:

### **Agreement**

1. **Recitals.** The foregoing recitals are true and correct and are incorporated into this Agreement.
2. **Term.** LCRDA hereby retains Architect for a period commencing on the Effective Date and ending upon the earlier of completion of the Services (as hereafter defined) or termination pursuant to the County Contract (the “Term”).
3. **Services.** During the Term, Architect shall provide the services (the “Services”) set forth on Exhibit “A” attached hereto and incorporated herein.
4. **Compensation.** Architect shall be compensated at the lump sum fee set forth in Exhibit “A”.
5. **Notices.** Any notice or other communication required or permitted hereunder shall be deemed sufficiently given if sent by registered or certified mail, return-receipt-requested, and addressed as follows (the address of either party may be changed by giving notice thereof to the other party):

If to LCRDA: Leon County Research and Development Authority  
Attn: Ron Miller  
1736 W. Paul Dirac Drive  
Tallahassee, Florida 32310

If to Architect: Architects Lewis + Whitlock  
Attn: Camden Whitlock  
206 W. Virginia Street  
Tallahassee, Florida 32301

6. County Contract. The terms and conditions of the County Contract shall govern the parties, the performance of the Services, and this Agreement. LCRDA assumes all rights and responsibilities of Leon County and Architect assumes all rights and responsibilities of Architect, as set forth in the County Contract. In the event there is a conflict between the terms of this Service Agreement and the County Contract, the terms of the County Contract shall control.

7. Counterparts. This Service Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. This Service Agreement may be executed by facsimile signature.

[SIGNATURE PAGE TO FOLLOW]

IN WITNESS WHEREOF, the parties hereto have set their signatures as of the date first written above.

\_\_\_\_\_  
Witness as to Architect

\_\_\_\_\_  
(Type or print name of witness)

\_\_\_\_\_  
Witness as to Architect

\_\_\_\_\_  
(Type or print name of witness)

**ARCHITECTS LEWIS + WHITLOCK,**

By: \_\_\_\_\_  
\_\_\_\_\_, President

\_\_\_\_\_  
Witness as to Authority

\_\_\_\_\_  
(Type or print name of witness)

\_\_\_\_\_  
Witness as to Authority

\_\_\_\_\_  
(Type or print name of witness)

**LEON COUNTY RESEARCH AND  
DEVELOPMENT AUTHORITY**

By: \_\_\_\_\_  
Anne Longman, Chair

**EXHIBIT A**

DRAFT

## Architects | Lewis + Whitlock

January 19, 2017 (Rev. 1/26/17)

Mr. Ronald J. Miller, Executive Director  
Leon County R&D Authority / Innovation Park  
1736 W. Paul Dirac Drive  
Tallahassee, FL 32310

### **RE: Proposal for Professional Services Jump Start / Collins Building Study**

Dear Mr. Miller:

Architects: Lewis + Whitlock, P.A. (AL+W) is pleased to present this proposal for professional services.

#### **Scope of Project**

This study consists of a building assessment and schematic design study to convert the Collins Building (at Innovation Park) into a co-working / fab lab facility for start-up businesses. The building size is approximately 25,800 gross square feet.

The initial design concept provided by the owner (see attached) includes modular maker spaces in the eastern half of the building, subdivided (existing) wet lab space, a new classroom, meeting rooms, office space, and coffee/collaboration space.

H2 Engineering and Structural Solutions Consulting Engineers are included on our team for this study.

#### **Services/Deliverables**

1. Building assessment: cursory survey of existing building, ADA review; assessment of site envelope/structure/MPE systems.
2. Schematic design concept: develop/refine floor plan concept, code review, cost estimate.
3. Project deliverables: executive summary report and associated floor plan graphics for the above. Deliverables include 5 hardcopies and a digital (.pdf) copy.
4. Services excluded from this proposal:
  - a. Civil Engineering
  - b. Hazardous materials investigation

#### **Project Schedule**

The following sequential schedule is proposed for this project. Variations from this schedule imposed by delayed Owner Review or changes to the scope may result in delays to the project.

Architects Notice-to-proceed  
Building Assessment  
Schematic Design

Day 1  
4 Weeks  
4 Weeks

**Fee and Invoicing**

Basic services for the project scope referenced herein shall be provided for a lump sum fee. The project fee, project tasks and billing milestones are indicated on the Architectural Fee Schedule.

**Additional Services**

Any changes to the project scope delineated herein following authorization of this proposal shall be undertaken as additional services requiring compensation to the Architect.

We appreciate the opportunity to work with you once again. Please call if you have any questions or concerns regarding this proposal.

Sincerely,

**Architects: Lewis + Whitlock, P.A.**



Camden Whitlock, AIA | LEED AP  
Principal

Att: Architectural Fee Schedule  
H2 Engineering Proposal  
Structural Solutions Proposal  
Design concept

**ARCHITECTURAL FEE SCHEDULE**

**Jump Start | Collins Building SD Study**  
**January 19, 2017 (Rev. 1/26/17)**

| <b>Hourly Rates:</b> |  |  |  | <b>Hourly Rate</b> |
|----------------------|--|--|--|--------------------|
| Principal            |  |  |  | \$160.00           |
| Project Manager      |  |  |  | \$125.00           |
| Graduate Architect   |  |  |  | \$85.00            |
| Clerical             |  |  |  | \$40.00            |

| <b>Study</b>                              | <b>Principal</b> | <b>Project Manager</b> | <b>Graduate Architect</b> | <b>Clerical</b> | <b>Subtotal</b>  |
|---|------------------|------------------------|---------------------------|-----------------|------------------|
| Building Assessment                       | 8.0              | 24.0                   | 24.0                      | -               |                  |
| Code Review                               | 2.0              | 8.0                    | -                         | -               |                  |
| Floor Plans                               | 2.0              | 16.0                   | 40.0                      | -               |                  |
| Cost Estimate                             | 6.0              | 2.0                    | 4.0                       | -               |                  |
| Report                                    | 2.0              | 4.0                    | 4.0                       | 4.0             |                  |
| Coordination / Meetings / Quality Control | 8.0              | 16.0                   | -                         | 4.0             |                  |
| total hours                               | 18.0             | 38.0                   | 48.0                      | 8.0             |                  |
| hourly rate                               | \$160.00         | \$125.00               | \$85.00                   | \$40.00         |                  |
| task sub-total                            | 2,880.00         | 4,750.00               | 4,080.00                  | 320.00          | <b>\$ 12,030</b> |
| <b>Sub-Total</b>                          |                  |                        |                           |                 | <b>\$ 12,030</b> |

**Consultant Fees**

Structural Solutions Engineers \$1,250  
H2 Engineering, Inc. \$9,860

**Lump Sum Fee** **\$ 23,140**

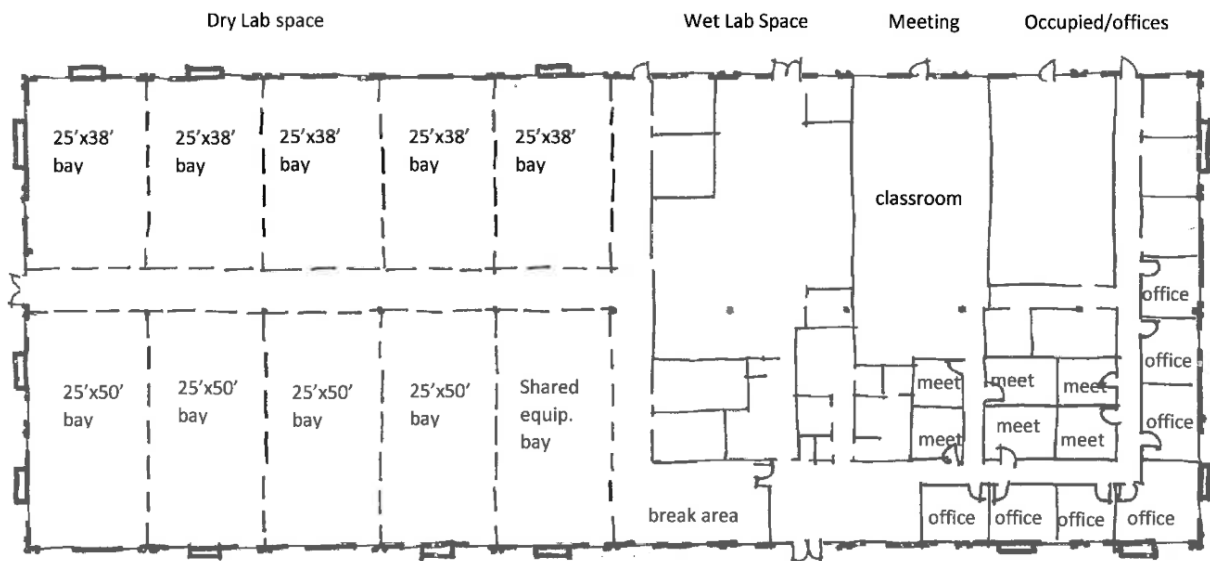




## EXHIBIT A – Scope of Services

### A1 PROJECT UNDERSTANDING/BACKGROUND

- .1 The project consists of a building assessment and schematic design study to convert the Collins Building (at Innovation Park) into a co-working/fab lab / innovation hub for the Park.
- .2 The building is approximately 25,000 square feet.



Collins Building – Proposed Incubator Space

Not to scale - August 24, 2016

### A2 PRE-DESIGN

- .1 Assessment
  - .a Meet with OWNER to ascertain project requirements.
  - .b Review of available existing construction documents.
  - .c Site investigation(s) to survey existing conditions, locations and types of MEP systems.
  - .d Florida Building Code and NFPA Codes analysis as applicable to MEP systems.
  - .e Memo style narrative describing existing conditions based on site survey and as-built plans review.
  - .f No functional testing MEP systems is included.
- .2 Schematic Design
  - .a Meet with OWNER to gather utility needs.
  - .b Preliminary MEP load estimates and utility impacts.
  - .c Assist project team with design considerations associated with MEP facilities.



- .d Memo style recommended MEP scope narrative based on understanding of desired space program and existing conditions survey and as-built plans review.
- .e MEP opinion of probable cost for recommended program.

**A3 EXCLUSIONS**

- .1 Construction documents.
- .2 Existing conditions drawings.

**END OF EXHIBIT A**



**EXHIBIT B – Compensation**

**B1 LUMP SUM FEE**

- .1 The lump sum fee for the Basic Services is \$9,860.00.
- .2 The basic services fee is derived as follows:

| Position                                    | Leon County<br>Minor Services<br>Billing Rates | Hours |   |           |                 |  |
|---|--|-------|---|-----------|-----------------|--|
| Principal                                   | \$177.50                                       | x 8   | = | \$        | 1,420.00        |  |
| Registered Professional (PE, RCDD, CxA, PA) | \$138.75                                       | x 40  | = | \$        | 5,550.00        |  |
| Graduate Engineer                           | \$100.00                                       | x 28  | = | \$        | 2,800.00        |  |
| Engineering Designer                        | \$76.25  | x 0   | = | \$        | -               |  |
| Construction Administrator/Cx Tech          | \$75.00  | x 0   | = | \$        | -               |  |
| BIM / CAD Technician                        | \$60.00  | x 0   | = | \$        | -               |  |
| Administrative                              | \$45.00  | x 2   | = | \$        | 90.00           |  |
| <b>Total Fee</b>                            |  |       |   | <b>\$</b> | <b>9,860.00</b> |  |

**B2 PAYMENT SCHEDULE**

|  |                    |
|--|--------------------|
| Upon delivery of Conditions Assessment                                   | \$ 4,140.00        |
| Upon delivery of Schematic Design Narrative and Opinion of Probable Cost | \$ 5,720.00        |
| <b>Total</b>   | <b>\$ 9,860.00</b> |

**B3 REIMBURSABLES**

- .1 Reimbursable factor –1.1

**END OF EXHIBIT B**

January 19, 2017

Camden Whitlock, AIA  
Principal  
Architects | Lewis + Whitlock  
206 West Virginia Street | Tallahassee, Florida | 32301

Ref: **Collins Building**

Subj. **Proposal and Letter Agreement for Structural Engineering Services**

Mr. Whitlock:

We appreciate the opportunity to provide this draft proposal for Structural Engineering Services on the above referenced Project. This letter will present our understanding of the project conditions, scope-of-work, and our proposed professional fees based on the project description and assumptions presented herein.

**A. Project Description**

1. The purpose of this project is evaluate the existing plans and existing condition of the Collins Building and to prepare a structural assessment report including the potential structural ramifications as they pertain to the proposed renovation.
2. The Collins Building is a 250'x100' pre-engineered metal building, clad with masonry.

**B. SSCE Scope of Structural Services**

1. Complete a site investigation to observe the existing components
2. Review the original construction documents.
3. Contact the City of Tallahassee Building department to discuss project requirements.
4. Prepare a report outlining observed structural deficiencies and possible structural concerns relative to the proposed renovation

**C. Project Conditions, Limitations and Exclusions:**

1. Measuring the existing structural components is not included in the scope of this proposal.
2. Performing calculations on the structural capacity of the existing structural components is not included in the scope of this proposal.
3. Construction documents are not included.
4. Cost Estimates are not included in this scope of services.

**D. Proposed Fees for Engineering Services: Proposed Structural Engineering fees will be a LUMP SUM FEE of \$1,250.00.**

**AGREEMENT AND NOTICE TO PROCEED**

By authorized signature below, both parties signify their agreement with the above contractual terms.

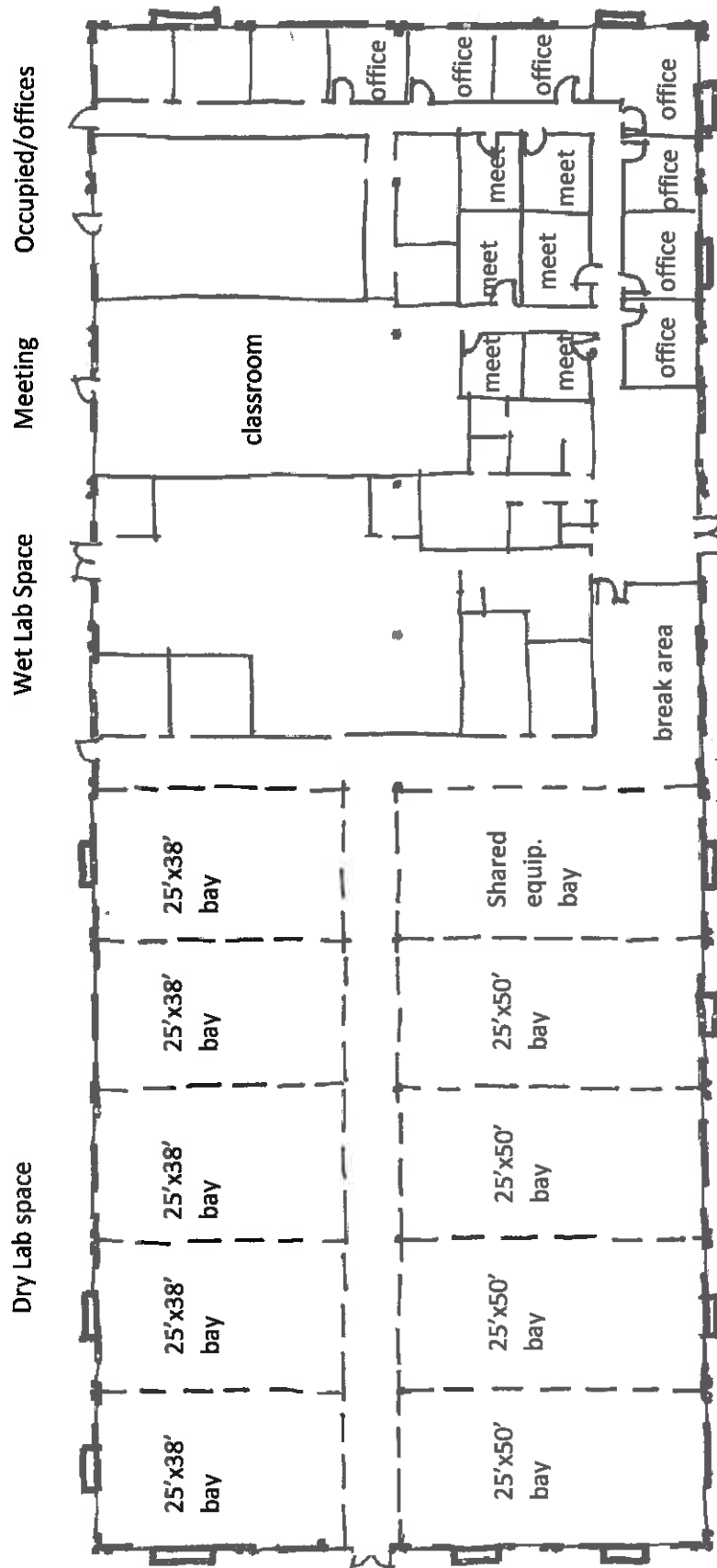


\_\_\_\_\_  
Structural Solutions Consulting Engineers, LLC Architect Lewis+Whitlock.

January 19, 2017

Date

\_\_\_\_\_  
Date



Collins Building – Proposed Incubator Space

Not to scale - August 24, 2016

**LEON COUNTY  
CONTRACT ROUTING FORM**

LOGGED IN A14-0853  
14 of 98  
LOGGED OUT HAS

Original  
 Renewal  
 Amendment( # )

County Contract No. 4108

Division Contact: JOHN WARD Phone # 606-5000

Department/Division: FACILITIES Management

Contractor: LEWIS & WHITLOCK

Address: 206 W Virginia St

City, State, Zip: Tallahassee, FL 32301 Phone 850-942-1718

Contract Period: From October 1, 2014 To September 30, 2016

Renewal Periods: Number 3 Term ONE YEAR

Contract Total \$ Amount: \_\_\_\_\_ or check if  Unit Price Agreement

|   |  |   |
|---|--|---|
| <b>Contract Type:</b>                                 | <b>Procurement Method:</b>                                 | <b>Forms Required:</b>  |
| <input type="checkbox"/> Conservation Easement        | <input checked="" type="checkbox"/> Bid*                   | <input checked="" type="checkbox"/> Public Entity Crimes State    |
| <input type="checkbox"/> Construction                 | <input type="checkbox"/> RFP*                              | <input type="checkbox"/> Performance Bond                         |
| <input checked="" type="checkbox"/> Continuing Supply | <input type="checkbox"/> Sole Source                       | <input type="checkbox"/> Materials & Payment Bond                 |
| <input type="checkbox"/> Deed                         | <input type="checkbox"/> Gov't Entity                      | <input type="checkbox"/> Warranty Bond                            |
| <input type="checkbox"/> Interlocal Agreement         | <input type="checkbox"/> Other (Explain Below)             | <input type="checkbox"/> Certification Regarding Department       |
| <input type="checkbox"/> Grant                        |  |   |
| <input type="checkbox"/> Lease                        | <b>Insurance Certificates:</b>                             | *Bid/RFP # <u>BC-0626-14-41</u>                                   |
| <input type="checkbox"/> Other Services               | <input checked="" type="checkbox"/> General Liability      | <b>Awarded by:</b>  |
| <input type="checkbox"/> Performance Agreement        | <input checked="" type="checkbox"/> Professional Liability | <input type="checkbox"/> Purchasing Director                      |
| <input type="checkbox"/> Professional Services        | <input checked="" type="checkbox"/> Workers' Compensation  | <input type="checkbox"/> County Administrator                     |
| <input type="checkbox"/> Purchase                     | <input type="checkbox"/> Errors & Omissions                | <input checked="" type="checkbox"/> Board of County Commissioners |
| <input type="checkbox"/> Other (Explain below)        | <input checked="" type="checkbox"/> Automobile Coverage    | Agenda Date <u>9/23/14</u> Item # <u>22</u>                       |

Comments: \_\_\_\_\_

RECEIVED  
 14 OCT 27 PM 3:06  
 CLERK & COMPTROLLER  
 FINANCE DIVISION  
 808 TAZER  
 RECEIVED  
 14 OCT 14 PM 3:51  
 RECEIVED  
 CLERK & COMPTROLLER  
 FINANCE DIVISION  
 808 TAZER

**Routing:**

| Required                            | Initials | Date            | Originating Division                     |
|-------------------------------------|----------|-----------------|--|
| <input type="checkbox"/>            |          |                 | Group Director                           |
| <input checked="" type="checkbox"/> |          | <u>10/20</u>    | Purchasing                               |
| <input checked="" type="checkbox"/> |          | <u>10/23</u>    | County Attorney's Office                 |
| <input type="checkbox"/>            |          |                 | Deputy or Assistant County Administrator |
| <input checked="" type="checkbox"/> |          | <u>10.23.14</u> | County Administrator                     |
| <input type="checkbox"/>            |          |                 | Chairman, BCC                            |
| <input checked="" type="checkbox"/> |          | <u>10/24/14</u> | Clerk's Office (Finance)                 |

Return completed documents to: Don Tassin, Purchasing

Be sure to return and file a fully executed agreement with the Finance Division

10/23/14 15:29:38  
 Received By  
 Leon County Attorney's Office

## AGREEMENT

THIS AGREEMENT, by and between LEON COUNTY, a charter county and a political subdivision of the State of Florida, hereinafter referred to as the "County" and ARCHITECTS LEWIS + WHITLOCK, hereinafter referred to as the "Contractor."

WHEREAS, the County has determined that it would be in the best interest of the citizens of Leon County, Florida, that the County be able to utilize the services of private persons when such services cannot be reasonably provided by the County; and

WHEREAS, the County has determined that it would be better to contract for these services than to hire the necessary personnel to satisfy the needs of the County; and

WHEREAS, in order to secure the lowest cost for these services, the County has sought and received competitive bids from contractor for such services.

NOW, THEREFORE, the parties hereto agree as follows:

### 1. SERVICES TO BE PROVIDED

The Contractor hereby agrees to provide to the County services related to Architectural & Interior Design Services in accordance with: 1) Architectural, Engineering, Interior Design and Related Services, RFP# BC-06-26-14-41 which is attached hereto and incorporated herein as Exhibit A, to the extent that it is not inconsistent with this Agreement; and 2) the Contractor's bid submission, which is attached hereto and incorporated herein as Exhibit B, to the extent that it is not inconsistent with this Agreement or with Exhibit A.

### 2. WORK

Any work to be performed shall be upon the written request of the County Administrator or his representative, which request shall set forth the commencing date of such work and the time within which such work shall be completed.

The performance of Leon County of any of its obligations under this Agreement shall be subject to and contingent upon the availability of funds lawfully expendable for the purposes of this Agreement for the current and any future periods provided for within the bid specifications.

### 3. TIME:

The Agreement shall be for a period of two (2) years, commencing on October 1, 2014, and shall continue until September 30, 2016. After the initial two (2) year period, at the sole option of the County, this Agreement may be extended for no more than three additional one (1) year periods. Such one (1) year extensions will be automatic unless the County provides written notice of non-renewal to the Contractor no less than thirty (30) days prior to the expiration date of the then current term.

### 4. CONTRACT SUM

The Contractor agrees that for the performance of the Services as outlined in Section 1 above, it shall be remunerated by the County according to the unit prices contained in this agreement, Exhibit C, which is attached hereto.

### 5. PAYMENTS

The County shall make such payments within forty-five (45) days of submission and approval of invoice for services.



6. PROMPT PAYMENT INFORMATION REQUIREMENTS

A. The County Project Manager is:

Name: John Ward  
Street Address: 1907 S. Monroe St.  
City, State, Zip Code Tallahassee, FL 32301  
Telephone: 850-606-5000  
E-mail: wardjoh@leoncountyfl.gov

B. The Contractor's Project Manager is:

Name: C. Camden Whitlock, AIA  
Street Address: 206 W Virginia Street  
City, State, Zip Code Tallahassee, FL 32301  
Telephone: 850.942.1718  
E-mail: cwhitlock@think3d.net

C. Proper form for an invoice is:

A numbered invoice document with date of invoice; reference of the County purchase order number; itemized listing of all goods and services being billed with unit prices and extended pricing; vendor's name, address, billing contact person information, and Federal tax identification number. The invoice must be properly addressed to the Division listed on the County purchase order and delivered to that address. Delivery to another County address will void the invoice.

7. STATUS

The contractor at all times relevant to this Agreement shall be an independent contractor and in no event shall the Contractor nor any employees or sub-contractors under it be considered to be employees of Leon County.

8. INSURANCE

Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors. The cost of such insurance shall be included in the Contractor's bid.

A. Minimum Limits of Insurance. Contractor shall maintain limits no less than:

1. General Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
2. Automobile Liability: \$1,000,000 combined single limit per accident for bodily injury and property damage. (Non-owned, Hired Car).
3. Workers' Compensation and Employers Liability: Insurance covering all employees meeting Statutory Limits in compliance with the applicable state and federal laws and Employer's Liability with a limit of \$500,000 per accident, \$500,000 disease policy limit, \$500,000 disease each employee. Waiver of Subrogation in lieu of Additional Insured is required.

B. Deductibles and Self-Insured Retentions

AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK  
BC-06-26-14-41

Any deductibles or self-insured retentions must be declared to and approved by the County. At the option of the County, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the County, its officers, officials, employees and volunteers; or the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

C. Other Insurance Provisions The policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability and Automobile Liability Coverages (County is to be named as Additional Insured).

a. The County, its officers, officials, employees and volunteers are to be covered as insureds as respects; liability arising out of activities performed by or on behalf of the Contractor, including the insured's general supervision of the Contractor; products and completed operations of the Contractor; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protections afforded the County, its officers, officials, employees or volunteers.

b. The Contractor's insurance coverage shall be primary insurance as respects the County, its officers, officials, employees and volunteers. Any insurance of self-insurance maintained by the County, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

c. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the county, its officers, officials, employees or volunteers.

d. The Contractor's insurance shall apply separately to each insured against whom claims is made or suit is brought, except with respect to the limits of the insurer's liability.

2. All Coverages  
Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days' prior written notice by certified mail, return receipt requested, has been given to the County.

D. Acceptability of Insurers. Insurance is to be placed with insurers with a Best's rating of no less than A:VII.

E. Verification of Coverage. Contractor shall furnish the County with certificates of insurance and with original endorsements effecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the County before work commences. The County reserves the right to require complete, certified copies of all required insurance policies at any time.

F. Subcontractors. Contractors shall include all subcontractors as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

9. PERMITS

The Contractor shall pay for all necessary permits as required by law.

AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK  
BC-06-26-14-41

10. LICENSES

The Contractor shall be responsible for obtaining and maintaining his city or county occupational license and any licenses required pursuant to the laws of Leon County, the City of Tallahassee, or the State of Florida. Should the Contractor, by reason of revocation, failure to renew, or any other reason, fail to maintain his license to operate, the contractor shall be in default as of the date such license is lost.

11. ASSIGNMENTS

This Agreement shall not be assigned or sublet as a whole or in part without the written consent of the County nor shall the contractor assign any monies due or to become due to him hereunder without the previous written consent of the County.

12. INDEMNIFICATION

The Contractor agrees to indemnify, defend and hold harmless the County, its officials, officers, employees and agents, from and against any and all claims, damages, liabilities, losses, costs, or suits of any nature whatsoever arising out of, because of, or due to any acts or omissions of the Contractor, its delegates, employees and agents, arising out of or under this Agreement, including reasonable attorney's fees. The County may, at its sole option, defend itself or require the Contractor to provide the defense. The Contractor acknowledges that ten dollars (\$10.00) of the amount paid to the Contractor is sufficient consideration for the Contractor's indemnification of the County.

13. AUDITS, RECORDS, AND RECORDS RETENTION

The Contractor agrees:

- a. To establish and maintain books, records, and documents (including electronic storage media) in accordance with generally accepted accounting procedures and practices, which sufficiently and properly reflect all revenues and expenditures of funds provided by the County under this Agreement.
- b. To retain all client records, financial records, supporting documents, statistical records, and any other documents (including electronic storage media) pertinent to this Agreement for a period of five (5) years after termination of the Agreement, or if an audit has been initiated and audit findings have not been resolved at the end of five (5) years, the records shall be retained until resolution of the audit findings or any litigation which may be based on the terms of this Agreement.
- c. Upon completion or termination of the Agreement and at the request of the County, the Contractor will cooperate with the County to facilitate the duplication and transfer of any said records or documents during the required retention period as specified in paragraph 1 above.
- d. To assure that these records shall be subject at all reasonable times to inspection, review, or audit by Federal, state, or other personnel duly authorized by the County.
- e. Persons duly authorized by the County and Federal auditors, pursuant to 45 CFR, Part 92.36(l)(10), shall have full access to and the right to examine any of provider's Agreement and related records and documents, regardless of the form in which kept, at all reasonable times for as long as records are retained.
- f. To include these aforementioned audit and record keeping requirements in all approved subcontracts and assignments.

14. MONITORING

To permit persons duly authorized by the County to inspect any records, papers, documents, facilities, goods, and services of the provider which are relevant to this Agreement, and interview any clients and

AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK  
BC-06-26-14-41

employees of the provider to assure the County of satisfactory performance of the terms and conditions of this Agreement.

Following such evaluation, the County will deliver to the provider a written report of its findings and will include written recommendations with regard to the provider's performance of the terms and conditions of this Agreement. The provider will correct all noted deficiencies identified by the County within the specified period of time set forth in the recommendations. The provider's failure to correct noted deficiencies may, at the sole and exclusive discretion of the County, result in any one or any combination of the following: (1) the provider being deemed in breach or default of this Agreement; (2) the withholding of payments to the provider by the County; and (3) the termination of this Agreement for cause.

15. TERMINATION

Leon County may terminate this Agreement without cause, by giving the Contractor thirty (30) days written notice of termination. Either party may terminate this Agreement for cause by giving the other party hereto thirty (30) days written notice of termination. The County shall not be required to give Contractor such thirty (30) day written notice if, in the opinion of the County, the Contractor is unable to perform its obligations hereunder, or if in the County's opinion, the services being provided are not satisfactory. In such case, the County may immediately terminate the Agreement by mailing a notice of termination to the Contractor.

16. PUBLIC ENTITY CRIMES STATEMENT

In accordance with Section 287.133, Florida Statutes, Contractor hereby certifies that to the best of his knowledge and belief neither Contractor nor his affiliates has been convicted of a public entity crime. Contractor and his affiliates shall provide the County with a completed public entity crime statement form no later than January 15 of each year this Agreement is in effect. Violation of this section by the Contractor shall be grounds for cancellation of this Agreement by Leon County.

17. UNAUTHORIZED ALIEN(S)

The Contractor agrees that unauthorized aliens shall not be employed nor utilized in the performance of the requirements of this solicitation. The County shall consider the employment or utilization of unauthorized aliens a violation of Section 274A(e) of the Immigration and Naturalization Act (8 U.S.C. 1324a). Such violation shall be cause for unilateral termination of this Agreement by the County.

18. NON-WAIVER

Failure by the County to enforce or insist upon compliance with any of the terms or conditions of this Agreement or failure to give notice or declare this Agreement terminated shall not constitute a general waiver or relinquishment of the same, or of any other terms, conditions or acts; but the same shall be and remain at all times in full force and effect.

19. REVISIONS

In any case where, in fulfilling the requirements of this Agreement or of any guarantee, embraced in or required thereby it is necessary for the Contractor to deviate from the requirements of the bid, Contractor shall obtain the prior written consent of the County.

20. VENUE

Venue for all actions arising under this Agreement shall lie in Leon County, Florida.

21. CONSTRUCTION

The validity, construction, and effect of this Agreement shall be governed by the laws of the State of Florida.

AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK  
BC-06-26-14-41

22. CONFLICTING TERMS AND CONDITIONS

In the instance that any other agreement exists concerning the matters herein, then the terms and conditions in this Agreement shall prevail over all other terms and conditions.

ATTACHMENTS

- Exhibit A – Solicitation Document
- Exhibit B - Vendors Response
- Exhibit C – Unit Pricing Sheet

**The remainder of this page intentionally left blank.**

AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK  
BC-06-26-14-41

WHERETO, the parties have set their hands and seals effective the date whereon the last party executes this Agreement.

LEON COUNTY, FLORIDA

By:

*Vincent S. Long*  
Vincent S. Long  
County Administrator



Date:

10-23-14

ARCHITECTS LEWIS + WHITLOCK

By:

*[Signature]*  
President or designee

Charles C. Whitlock  
Printed Name

Title:

President

Date:

Oct. 16, 2014

ATTEST:

Bob Inzer, Clerk of the Circuit Court & Comptroller  
Leon County, Florida

BY:

*John Stott, Deputy Clerk*

Approved as to Form:  
Leon County Attorney's Office

BY:

*[Signature]*  
Herbert W. A. Thiele, Esquire  
County Attorney



**REQUEST FOR PROPOSALS**

**FOR**

**ARCHITECTURAL, ENGINEERING, INTERIOR DESIGN, AND  
RELATED SERVICES;**

**CONTINUING SUPPLY**

**PROPOSAL NUMBER BC-06-26-14-41**

**BOARD OF COUNTY COMMISSIONERS  
LEON COUNTY, FLORIDA**

Release Date: May 23, 2014

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

---

## I. INTRODUCTION

Leon County requests proposals from firms interested in providing professional design services on a continuing supply basis for work in the following categories:

- a. Electrical
- b. Mechanical
- c. Plumbing
- d. Structural
- e. Site Civil
- f. Architectural
- g. Interior Design

Services may include, but are not be limited to preparation of plans and specifications for projects; administration of each activity required to implement the concepts from start to final completion; studies within the discipline area; and other such duties as may be allowed under Florida law. Services will be on an as needed basis for small projects to be coordinated primarily by the Facilities Management Division. However, other County divisions may requires services as well during the term of this contract.

Firms shall identify in their response to this Request for Proposals the categories of work for which they want to be considered (please mark the appropriate box(es) on the Proposal Response Cover Sheet (page 18). During the selection process, each firm will be evaluated and ranked as to their qualifications to provide the services for each category of work for which they have requested to be considered. It is anticipated that up to five firms will be selected for each category of work, and that firms selected for more than one category will have their work scope based on those work categories. Consultants under contract with the County will only be authorized to provide the services described in the work categories for which they were selected. Firms not selected for a work category will not be authorized to provide services in that category. In cases where a work assignment may bridge two categories, Leon County staff shall make the determination as to the work category that applies to the assignment.

All professional services to be provided under this agreement shall be performed by Professionals licensed to practice in the State of Florida and in strict compliance with the Consultant's Competitive Negotiation Act, 287.055 F.S. (CCNA). Consultants providing services under this contract shall at all times be knowledgeable of the limiting thresholds of the CCNA statutes and shall insure that full compliance therewith is maintained at all times. Professional services shall be provided according to the Leon County Professional Services Guidelines, available on the Leon County Facilities Management web site.

Applicants should be aware that projects to be developed under this contract may have a construction value of from \$10,000 to almost \$2,000,000. Studies may have a fee of up to \$200,000. Information provided for consideration should bear these limitations in mind.

Leon County reserves the right to negotiate with the successful vendor (s) for related items not specifically list within the category limits listed in 287.055.

It is the intent of the County to contract with several firms in each category, in order to meet the anticipated need for services. The contract period shall be for two (2) years with three optional one (1) year periods for a possible total of five (5) years.

## II. GENERAL INSTRUCTIONS:

- A. Response Address: The response to the proposal should be submitted in a sealed envelope/package addressed in the following manner:

*Proposal Number*  
*Purchasing Division*  
*1800-3 N. Blair Stone Road*  
*Tallahassee, FL 32308*



RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, **Continuing Supply**  
 Proposal Number: BC-06-26-14-41  
 Opening Date: Thursday, June 26, 2014 at 2:00 PM

- B. **Proposal Copies:** One ORIGINAL, five (5) copies and one electronic copy of the Response ("Proposal") must be furnished on or before the deadline. Responses will be retained as property of the County. **The ORIGINAL of your reply must be clearly marked "Original" on its face and must contain an original, non-electronic signature of an authorized representative of the responding firm or individual**, all other copies may be photocopies and should be printed double-sided. The contents of the proposal of the successful Proposer will become part of the contractual obligations.
- C. **Schedule of Events:** Below in Table 1 is the current schedule of the events that will take place as part of this solicitation. Leon County reserves the right to make changes or alterations to the schedule as the Leon County determines is in the best interest of the public. If any changes to the Schedule of Events are made, Leon County will post the changes on the Leon County website either as a public meeting notice, or as an addendum, as applicable. **It is the responsibility of Registered Planholders and other interested persons and parties to review the Purchasing Division's website to stay informed of the Schedule of Events, addenda to the RFP, and public meetings.** The website addresses follow:

**Addenda:** <http://www.leoncountyfl.gov/Purchasing/Addenda>

**Public Meetings:** <http://www.leoncountyfl.gov/Purchasing/PublicMeetingNotices>

| Table 1 - Schedule of Events                   |  |
|--|--|
| Date and Time<br>(all eastern time)            | Event  |
| May 23, 2014                                   | Release of the RFP   |
| Not later than:<br>June 16, 2014               | <b>QUESTIONS/INQUIRIES DEADLINE:</b><br>Date and time by which written questions and inquiries regarding the RFP must be received by the Leon County Purchasing Division via e-mail submittal to Shelly Kelley at <a href="mailto:kelleys@leoncountyfl.gov">kelleys@leoncountyfl.gov</a> and Don Tobin at <a href="mailto:tobind@leoncountyfl.gov">tobind@leoncountyfl.gov</a> . Respondents are requested to send the e-mail to both representatives. |
| Not later than:<br>June 26, 2016 at<br>2:00 PM | <b>OPENING DATE:</b><br>Date and time by which <b>Proposals</b> must be received by the Leon County Purchasing Division, located at 1800-3 North Blair Stone Road, Tallahassee, FL 32308   |

- D. **Information:** Any questions concerning the request for proposal process, required submittals, evaluation criteria, proposal schedule, and selection process should be directed to Shelly W. Kelley and Don Tobin at (850) 606-1600; FAX (850) 606-1601; or e-mail at [kelleys@leoncountyfl.gov](mailto:kelleys@leoncountyfl.gov) and [tobind@leoncountyfl.gov](mailto:tobind@leoncountyfl.gov). **Vendors are requested to send such requests to both representatives of the Purchasing Division.** Email inquiries are preferred.

Each Vendor shall examine the request for proposal documents carefully; and, no later than seven days prior to the date for receipt of proposals, he shall make a written request to the County for interpretations or corrections of any ambiguity, inconsistency or error which he may discover. All interpretations or corrections will be issued as addenda. The County will not be responsible for oral clarifications. No negotiations, decisions or actions shall be initiated or executed by the proposer as a result of any discussions with any County employee prior to the opening of proposals. Only those communications which are in writing from the County may be considered as a duly authorized expression on the behalf of the Board. Also, only communications from firms which are in writing and signed will be recognized by the Board as duly authorized expressions on behalf of proposers.

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- E. **Prohibited Communications:** Any Form of communication, except for written communication with the Purchasing Division requesting clarifications or questions, shall be prohibited regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between:
1. Any person or person's representative seeking an award from such competitive solicitation; and
  2. Any County Commissioner or Commissioner's staff, or any county employee authorized to act on behalf of the Commission to award a particular contract.

For the purpose of this section, a person's representative shall include, but not be limited to, the person's employee, partner, officer, director, consultant, lobbyist, or any actual or potential subcontractor or consultant of the person.

The prohibited communication shall be in effect as of the release of the competitive solicitation and terminate at the time the Board, or a County department authorized to act on behalf of the Board, awards or approves a contract, rejects all bids or responses, or otherwise takes action which ends the solicitation process.

The provisions of this section shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, contract negotiations during any public meetings, presentations made to the Board, and protest hearings. Further, the provisions of this section shall not apply to contract negotiations between any employee and the intended awardee, any dispute resolution process following the filing of a protest between the person filing the protest and any employee, or any written correspondence with any employee, County Commissioner, or decision-making board member or selection committee member, unless specifically prohibited by the applicable competitive solicitation process.

The penalties for an intentional violation of this article shall be those specified in §125.69(1), Florida Statutes, as amended, and shall be deemed supplemental to the penalties set forth in Section 1-9 of the Code of Laws, Leon County, Florida.

- F. **Special Accommodation:** Any person requiring a special accommodation at a Pre-Proposal Conference or Bid/RFP opening because of a disability should call the Division of Purchasing at (850) 606-1600 at least five (5) workdays prior to the Pre-Proposal Conference or Bid/RFP opening. If you are hearing or speech impaired, please contact the Purchasing Division by calling the County Administrator's Office using the Florida Relay Service which can be reached at 1(800) 955-8771 (TDD).
- G. **Proposer Registration:** Proposers who obtain solicitation documents from sources other than the Leon County Purchasing Division or DemandStar.com MUST officially register with the County Purchasing Division in order to be placed on the planholders list for the solicitation. This list is used for communications from the County to prospective Proposers. Also, Proposers should be aware that solicitation documents obtained from sources other than those listed above may be drafts, incomplete, or in some other fashion different from the official solicitation document(s). Failure to register as a prospective Proposer through the Purchasing Division or online through DemandStar.com may cause your submittal to be rejected as non-responsive.

As a convenience to vendors, Leon County has made available via the internet lists of all registered planholders for each bid or request for proposals. The information is available on-line at <http://www.leoncountyfl.gov/Purchasing/Bid.asp> by simply clicking the planholder link to the right of the respective solicitation. A listing of the registered vendors with their telephone and fax numbers is designed to assist vendors in preparation of their responses.

- H. **Proposal Deadline:** Your Proposal prepared in response to this RFP must be received by the Purchasing Division at the above listed address no later than the Opening Date (date and time), as

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identified in the Schedule of Events, to be considered.

- I. **Receipt and Opening of Vendor Responses:** Vendor responses will be opened publicly at the date and time identified in the Schedule of Events as the Opening Date. A tabulation sheet of timely received Proposals will be made public and will be posted on the Purchasing Division website at: <http://www.leoncountyfl.gov/Purchasing/TabulationSheets>. A vendor may request, in their submittal, a copy of the tabulation sheet to be mailed in a vendor provided, stamped self-addressed envelope for their record.
- Responses to the RFP received prior to the time of opening will be secured unopened. The Purchasing Agent, whose duty it is to open the responses, will decide when the specified time has arrived and no proposals received thereafter will be considered. The Purchasing Agent will not be responsible for the premature opening of a proposal not properly addressed and identified by Proposal number on the outside of the envelope/package.
- Sealed bids, proposals, or replies received by the County pursuant to a competitive solicitation are exempt from public records disclosure until such time as the County posts an intended decision or until 30 days after opening of the documents, whichever is earlier.
- J. **Timely Delivery:** It is the Proposers responsibility to assure that the proposal is delivered at the proper time and location. Responses received after the scheduled receipt time will be marked "TOO LATE." Late proposals may be returned unopened to the vendor.
- K. **Preparation Costs:** The County is not liable for any costs incurred by Respondents prior to the issuance of an executed contract.
- L. **Interviews:** Firms responding to this RFP must be available for interviews by County staff and/or the Board of County Commissioners.
- M. **Preparation and Changes:** Proposal must be typed or printed in ink. All corrections made by the Proposer prior to the opening must be initialed and dated by the Proposer. No changes or corrections will be allowed after proposals are opened.
- N. **Reservation of Rights:** The County reserves the right to reject any and/or all proposals, in whole or in part, when such rejection is in the best interest of the County. Further, the County reserves the right to withdraw this solicitation at any time prior to final award of contract.
- O. **Cancellation:** The contract may be terminated by the County without cause by giving a minimum of thirty (30) days written notice of intent to terminate. Contract prices must be maintained until the end of the thirty (30) day period. The County may terminate this agreement at any time as a result of the contractor's failure to perform in accordance with these specifications and applicable contract. The County may retain/withhold payment for nonperformance if deemed appropriate to do so by the County.
- P. **Public Entity Crimes Statement:** A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, 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. By submission of a proposal in response to this solicitation, the proposer certifies compliance with the above requirements as stated in Section 287.133, Florida Statutes.
- Q. **Certification Regarding Debarment, Suspension, and Other Responsibility Matters:** The prospective

primary participant must certify to the best of its knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency and meet all other such responsibility matters as contained on the attached certification form.

- R. Licenses and Registrations: The contractor shall be responsible for obtaining and maintaining throughout the contract period his or her city occupational license and any licenses required pursuant to the laws of Leon County, the City of Tallahassee, or the State of Florida.

If the contractor is operating under a fictitious name as defined in Section 865.09, Florida Statutes, proof of current registration with the Florida Secretary of State **shall be submitted** with the bid. A business formed by an attorney actively licensed to practice law in this state, by a person actively licensed by the Department of Business and Professional Regulation or the Department of Health for the purpose of practicing his or her licensed profession, or by any corporation, partnership, or other commercial entity that is actively organized or registered with the Department of State **shall submit** a copy of the current licensing from the appropriate agency and/or proof of current active status with the Division of Corporations of the State of Florida or such other state as applicable.

Failure to provide the above required documentation may result in the proposal being determined as non-responsive.

- S. Audits, Records, and Records Retention:

The Contractor shall agree:

1. To establish and maintain books, records, and documents (including electronic storage media) in accordance with generally accepted accounting procedures and practices, which sufficiently and properly reflect all revenues and expenditures of funds provided by the County under this contract.
2. To retain all client records, financial records, supporting documents, statistical records, and any other documents (including electronic storage media) pertinent to this contract for a period of five (5) years after termination of the contract, or if an audit has been initiated and audit findings have not been resolved at the end of five (5) years, the records shall be retained until resolution of the audit findings or any litigation which may be based on the terms of this contract.
3. Upon completion or termination of the contract and at the request of the County, the Contractor will cooperate with the County to facilitate the duplication and transfer of any said records or documents during the required retention period as specified in paragraph 1 above.
4. To assure that these records shall be subject at all reasonable times to inspection, review, or audit by Federal, state, or other personnel duly authorized by the County.
5. Persons duly authorized by the County and Federal auditors, pursuant to 45 CFR, Part 92.36(l)(10), shall have full access to and the right to examine any of provider's contract and related records and documents, regardless of the form in which kept, at all reasonable times for as long as records are retained.
6. To include these aforementioned audit and record keeping requirements in all approved subcontracts and assignments.

- T. Monitoring:

To permit persons duly authorized by the County to inspect any records, papers, documents, facilities, goods, and services of the provider which are relevant to this contract, and interview any clients and employees of the provider to assure the County of satisfactory performance of the terms and conditions of this contract.

Following such evaluation, the County will deliver to the provider a written report of its findings and

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will include written recommendations with regard to the provider's performance of the terms and conditions of this contract. The provider will correct all noted deficiencies identified by the County within the specified period of time set forth in the recommendations. The provider's failure to correct noted deficiencies may, at the sole and exclusive discretion of the County, result in any one or any combination of the following: (1) the provider being deemed in breach or default of this contract; (2) the withholding of payments to the provider by the County; and (3) the termination of this contract for cause.

U. Local Preference in Purchasing and Contracting:

1. Preference in requests for proposals. In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures for which a request for proposals is developed with evaluation criteria, a local preference of the total score may be assigned for a local preference, as follows:
  - a) Individuals or firms which have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a local business as set forth in this section, shall be given a preference in the amount of five percent.
  - b) Individuals or firms which do not have a home office located within Leon, Gadsden, Wakulla, or Jefferson County, and which meet all of the criteria for a local business as set forth in this article, shall be given a preference in the amount of three percent.
2. Local business definition. For purposes of this section, "local business" shall mean a business which:
  - a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six (6) months immediately prior to the issuance of the request for competitive bids or request for proposals by the County; and
  - b) Holds any business license required by Leon County, and, if applicable, the City of Tallahassee; and
  - c) Is the principal offeror who is a single offeror; a business which is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.
3. Certification. Any vendor claiming to be a local business as defined herein, shall so certify in writing to the Purchasing Division. The certification shall provide all necessary information to meet the requirements set forth above. The Local Vendor Certification Form is enclosed. The purchasing agent shall not be required to verify the accuracy of any such certifications, and shall have the sole discretion to determine if a vendor meets the definition of a "local business."

V. Addenda To The RFP: If any addenda are issued after the initial RFP is released, the County will post the addenda on the Leon County website at <http://www.co.leon.fl.us/purchasing/addenda>. It is the responsibility of the vendor prior to submission of any proposal to check the above website or contact the Leon County Purchasing Division at (850) 606-1600 to verify any addenda issued. The receipt of all addenda must be acknowledged on the response sheet.

W. Unauthorized Alien(s): The Contractor agrees that unauthorized aliens shall not be employed nor utilized in the performance of the requirements of this solicitation or any work authorized thereunder. The County shall consider the employment or utilization of unauthorized aliens a violation of Section 274A(e) of the Immigration and Naturalization Act (8 U.S.C. 1324a). Such violation shall be cause for unilateral termination of this Agreement by the County. As part of the response to this solicitation, please complete and submit the attached form "AFFIDAVIT CERTIFICATION IMMIGRATION LAWS."

X. Employment Eligibility Verification:

1. Contractor agrees that it will enroll and participate in the federal E-Verify Program for Employment Verification under the terms provided in the "Memorandum of Understanding" governing the program. Contractor further agrees to provide to the County, within thirty days of the effective date of this contract/amendment/extension, documentation of such enrollment in the form of a copy of the E-Verify "Edit Company Profile" screen, which contains proof of enrollment in the E-Verify Program (this page can be accessed from the "Edit Company Profile" link on the left navigation menu of the E-Verify employer's homepage).
2. Contractor further agrees that it will require each subcontractor that performs work under this contract to enroll and participate in the E-Verify Program within sixty days of the effective date of this contract/amendment/extension or within sixty days of the effective date of the contract between the Contractor and the subcontractor, whichever is later. The Contractor shall obtain from the subcontractor(s) a copy of the "Edit Company Profile" screen indicating enrollment in the E-Verify Program and make such record(s) available to the Agency upon request.
3. Contractor will utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of: (a) all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida; and (b) all persons (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement.
  - a. Contractor must use E-Verify to initiate verification of employment eligibility for all persons employed during the term of the Agreement by Contractor to perform employment duties within Florida within 3 business days after the date of hire.
  - b. Contractor must initiate verification of each person (including subcontractors) assigned by Contractor to perform work pursuant to the Agreement within 60 calendar days after the date of execution of this contract or within 30 days after assignment to perform work pursuant to the Agreement, whichever is later.
4. Contractor further agrees to maintain records of its participation and compliance with the provisions of the E-Verify program, including participation by its subcontractors as provided above, and to make such records available to the County or other authorized state entity consistent with the terms of the Memorandum of Understanding.
5. Compliance with the terms of this Employment Eligibility Verification provision is made an express condition of this contract and the County may treat a failure to comply as a material breach of the contract.

- Y. Award of RFP and Protest: The proposal will be awarded as soon as possible to the responsive, responsible respondent(s) who rank highest in the evaluation process, unless otherwise stated elsewhere in this document. The County reserves the right to waive any informality in proposals and to award a proposal in whole or in part when either or both conditions are in the best interest of Leon County.

Notice of the Intended Decision will be posted on the Leon County website at: <http://www.leoncountyfl.gov/purchasing/IntendedDecision> for a period of seventy-two (72) consecutive hours, which does not include weekends or County observed holidays. Any Bidder/Respondent who desires to protest the Intended Decision must file a notice of intent to protest in writing within seventy-two (72) hours after the posting of the Notice of Intended Decision. Any bid award recommendation may be protested on the grounds of irregularities in the specifications, bid procedure, or the evaluation of the bid. Such notice of intent of bid protest shall be made in writing to the Purchasing Director, 1800-3 Blair Stone Road, Tallahassee, Florida 32308.

Protestor shall file a formal written bid protest within 10 days after the date in which the notice of

intent of bid protest has been submitted. Failure to file a notice of intent of bid protest or failure to file a formal written bid protest shall constitute a waiver of all rights granted under this section. The vendor shall be responsible for inquiring as to any and all award recommendation/postings.

Should concerns or discrepancies arise during the bid process, vendors are encouraged to contact the Purchasing Division prior to the scheduled bid opening. Such matters will be addressed and/or remedied prior to a bid opening or award whenever practically possible. Vendors are not to contact departments or divisions regarding the vendor complaint.

- Z. Errors and Omissions: The County and its representatives shall not be responsible for any errors or omission in the RFP. Due care and diligence has been exercised in the preparation of this RFP, and all information contained herein is believed to be substantially correct. Information is subject to review by the successful proposer.

AA. WORK

Contractor understands that no amount of work is guaranteed to it nor is the County under an obligation to utilize the services of the Contractor in those instances where the work to be performed can be done by County personnel or under separate contract. Any work to be performed shall be upon the written request of the County Administrator or his representative, which request shall set forth the commencing date of such work and the time within which such work shall be completed.

BB. PRICE INCREASES

Upon written request from the vendor, no less than 45 days prior to each anniversary date of the agreement, and at the discretion of the County, an annual price increase may be negotiated. It is the intent of the County to not allow a price increase greater than the Consumer Price Index for All Consumers (CPI-U) for the latest twelve month period reported at the time of request. In the event of an extraordinary factor (such as an increase in the federal minimum wage) occurring out of the annual cycle, the County may consider a price adjustment on a case-by-case basis upon the written request of the contractor. All price increases shall be at the sole discretion of the County and are not seen as automatic.

III. SCOPE OF SERVICES:

Services may include, but are not be limited to:

- architectural services
- interior design services
- structural engineering
- mechanical engineering
- electrical engineering
- plumbing engineering
- structural failure repairs
- remodeling projects
- building systems modifications
- alternative energy systems
- forensic investigations
- energy conservation studies and upgrades
- water conservation studies
- sustainability improvements and LEED evaluations
- specialty services (Environmental Analysis Phase I & II)
- environmental & building permitting assistance
- water & sewer engineering
- real estate land surveying
- roofing and re-roofing
- waterproofing projects

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- water intrusion investigations
- PV systems
- Energy efficiency systems
- Water harvesting systems
- Geothermal systems

#### IV. REQUIRED SUBMITTALS:

**Proposals are to be submitted bound by binder clips only.** No manner of plastic, comb or wire bindings, three ring binders, or staples are acceptable. All copies of proposals are to be printed double-sided, on paper with no less than 30% post-consumer recycled content. As a part of our sustainability program, Leon County is reducing the excess packaging, binders, and waste associated with submittals.

Each Applicant is requested to provide the following information using the same numbering/lettering scheme as the format below.

In preparation of responses, Applicants shall address the Selection Criteria listed in Section V. below. Applicants shall consider the general information provided herein and provide information appropriate for consideration for this RFP. Specific information to be submitted is listed below.

##### A. APPLICANT INFORMATION

1. Firm name or Joint Venture, business address and office location, telephone number, and e-mail address for contact person for this RFP. If a joint venture, list participating firms and outline specific areas of responsibility (including administrative, technical, and financial) of each firm.
2. Provide address of the office that is to perform the work, if different.

##### B. EXECUTIVE SUMMARY

1. Present in brief, concise terms, a summary level description of the company, its capabilities, and the distinctive competitive attributes of the respondent to provide the scope of services. Give the names of the person(s) who will be authorized to make representations for the respondent, their title(s), address(es), and telephone and fax number(s).
2. The summary must be limited to a maximum of two pages and the signer of the RFP must declare that the RFP is in all respects fair and in good faith without collusion or fraud and that the signer of the RFP has the authority to bind principal proponent.

##### C. ABILITY OF PROFESSIONAL PERSONNEL

1. Provide the total number of professionals in your organization who may be assigned to this category of project and their availability to provide services on relatively short notice for the small to medium size projects that are contemplated in this contract.
2. Give brief resume of key persons to be assigned to projects including but, not limited to:
  - 1) Name & title
  - 2) Job assignment for other projects
  - 3) How many years with this firm
  - 4) How many years with other firms
  - 5) Experience
    - a) Types of projects
    - b) Size of projects (e.g., dollar value, size and scope of project)
    - c) What was the specific project involvement?
  - 6) Education



- 7) Active registration
  - 8) Other experience and qualifications relevant to this project
3. If the respondent is not a joint venture, list outside consultants anticipated to be used on this project. When listing consultants, give the respective specialty of the firm. Standard form SF330 may be used for consultants, if desired.
- D. EXPERIENCE WITH PROJECTS OF A SIMILAR TYPE AND SIZE**
1. List the projects in the Work Category which best illustrate the experience of the firm and current staff which is being assigned to this project. (List no more than 10 projects, nor projects which were completed more than five (5) years ago.)
    - a) Name and location of the project
    - b) The nature of the firm's responsibility on this project
    - c) Project Owner's representative name, address and phone number
    - d) Project user agency's representative name, address and phone number
    - e) Date project was completed or is anticipated to be completed
    - f) Project manager and other key professionals involved and specify the role of each.
  2. Provide names and descriptions of projects for which the firm is presently under contract that demonstrate capabilities and qualifications for this work category.
  3. Describe the Firm/Joint Venture's process and procedures for insuring that current design standards, codes and other regulatory direction are utilized by staff in project design for this Work Category.
  4. Describe the Firm/Joint Venture's process and procedures for insuring that current design standards, codes and other regulatory direction are utilized by staff in project design for this Work Category.
  5. Describe basic and special resources available to the firm for the performance of the duties that may be assigned in this work category. Examples would be specialty software, equipment, computers, vehicles, etc.
- E. WILLINGNESS TO MEET SCHEDULE AND BUDGET REQUIREMENTS**
- Given the fiscal constraints of local governments, and Leon County in particular, all budget requirements for projects to be assigned must be met. Describe your methodology for ensuring the schedule is met and for ensuring budget requirements are not exceeded.
- F. EFFECT OF FIRM'S RECENT, CURRENT AND PROJECTED WORKLOAD**
1. Provide names and descriptions of projects for which the firm is presently under contract and the anticipated completion dates of those projects.
  2. Describe the firm's ability to absorb any projects resulting from this contract.
- H. APPROACH TO THE PROJECT**
- Present in brief, concise terms, a summary level description of the company's approach to accepting and completing any specific projects that may be assigned under this contract.
- C. REQUIRED FORMS**
- Complete and submit the following forms: Affidavit Certification Immigration Laws; Equal

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Employment Policies; Insurance Certification Form; Certification Regarding Debarment, Suspension, And Other Responsibility Matters Primary Covered Transactions; and if applicable, the Local Vendor Certification form.

**V. SELECTION PROCESS**

- A. The County Administrator shall appoint an Evaluation Committee composed of three to five members who will review all proposals received on time, and select one or more firms for interview based on the responses of each proposer. All meetings of Evaluation Committees subsequent to the opening of the solicitation shall be public meetings. Notice of all meetings shall be posted in the Purchasing Division Offices no less than 72 hours (excluding weekends and holidays) and all respondents to the solicitation shall be notified by facsimile or telephone.
- B. The Evaluation Committee will recommend to the Board of County Commissioners (BCC), in firms deemed to be most highly qualified to perform the requested services. The Evaluation Committee may give preference in its selection of firms to those highly skilled in certain of the specialized services listed in Part III in order to have those firms under contract if the need arises. The specialized services of major importance to the BCC include, but are not limited to, structural repairs, remodeling projects, alternative energy systems, forensic investigations, energy studies, water conservation studies, and sustainability improvements and LEED evaluations. Should more than one firm demonstrate a high level of competence in one of these areas of specialization, the County reserves the right to evaluate these firms with the following criteria. The BCC reserves the right to give preference to small businesses. Small business applicants are encouraged to apply for SBE vendor status through the Leon County Minority, Women and Small Business Enterprise Division.
- C. The (BCC) will negotiate with the recommended firms for the proposed services at compensation which the BCC determines is fair, competitive, and reasonable for said services.
- D. Should the BCC be unable to negotiate a satisfactory contract with a recommended firm considered to be fair, competitive and reasonable, negotiations with that firm shall be formally terminated. The (BCC) will negotiate with the most qualified firm (first ranked firm) for the proposed services at compensation which the BCC determines is fair, competitive, and reasonable for said services.
- E. Should the County be unable to negotiate a satisfactory contract with any of the selected firms, the Board representative shall select additional firms to continue negotiations.
- F. Evaluation Criteria: Evaluation of Proposals. Only written responses of statements of qualifications, performance data, and other data received in the purchasing office by the publicized submission time and date shall be evaluated. Proposals will be evaluated and scored by the members of the Evaluation Committee on the basis of the following considerations:

| CRITERIA  | MAXIMUM RATING |
|---|----------------|
| Ability of Professional Personnel                       | 25             |
| Firm's Experience with services listed                  | 25             |
| Willingness to Meet Schedule and Budget Requirements    | 10             |
| Effect of Firm's Recent, Current and Projected Workload | 15             |
| Approach  | 20             |
| Local Preference  | 5              |

- 1) The initial ranking of proposals is based upon the points given in the Weighted Scoring Sheet

utilizing the Evaluation Criteria Matrix. The scores will be provided by the Purchasing and MWSBE Divisions for Local preference and MWBE participation, respectively.

- 2) Short-listing. The best-qualified respondents shall be based upon the CCNA Evaluation Committee's ability to differentiate qualifications applicable to the scope and nature of the services to be performed as indicated by the ratings on the Weighted Scoring Sheet. At the option of the Evaluation Committee, no more than the top three rated firms for each specialized service, if there are at least three responsive respondents, will be considered as the short-listed firms, unless the County Administrator, after input and discussion with the CCNA Evaluation Committee, approves adding additional firms to the shortlist.
- 3) Presentations/Interviews and Final Ranking. After reviewing the applicants in each category and their initial ranking, the CCNA Evaluation Committee may request formal interviews for some or all of the applicant categories. The committee shall utilize the Ordinal Process Rating System to rank the firms and shall list respondents in order of preference. The list of best-qualified firms, along with the number of firms to include in each category, shall be forwarded to the County Administrator or Board, as appropriate, for approval prior to beginning contract negotiations. Negotiation sequence shall be based on the order of preference.

## VI. INDEMNIFICATION

The Contractor shall indemnify and hold harmless the County, its officials, officers and employees from and against all liabilities, damages, losses, and costs, including, but not limited to, reasonable attorney's fee, to the extent caused by negligence, recklessness, or intentionally wrongful conduct of the Contractor and other persons employed or utilized by the Contractor in the performance of this agreement.

The County may, at its sole option, defend itself or require the Contractor to provide the defense. The Contractor acknowledges that the sum of ten dollars (\$10.00) of the amount paid to the Contractor constitutes sufficient consideration for the Contractor's indemnification of the County, its officials, officers and employees..

The Contractor shall be liable to the County for any reasonable costs incurred by it to correct, modify, or redesign any portion of the project, which is the subject of the services provided under this Agreement, that is found to be defective or not in accordance with this Agreement, as a result and to the extent caused by the negligence, recklessness, or intentional wrongful conduct on the part of the Contractor and other persons employed or utilized by the Contractor in the performance of this Agreement.

## VII. MINORITY/WOMEN BUSINESS ENTERPRISE AND EQUAL OPPORTUNITY POLICIES

### A. Minority Business Enterprise (MBE) and Women (WBE) Business Enterprise Requirements

1. There is no Minority and Women Business Enterprise aspirational target prescribed for this solicitation.
2. The purpose of the Minority and Women-Owned Business Enterprise (MWBE) Program is to effectively communicate Leon County procurement and contracting opportunities, through enhanced business relationships, to end disparity and to increase participation opportunities for certified minority and women-owned business enterprises in a competitive environment. This program shall:
  - a. Eliminate any policies and/or procedural barriers that inhibit MBE and WBE participation in our procurement process.
  - b. Established targets designed to increase MBE and WBE utilization proportionate to

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documented underutilization.

- c. Provide increased levels of information and assistance available to MBE's and WBEs.
  - d. Implement mechanisms and procedures for monitoring MBE and WBE compliance by prime contractors.
3. Each Respondent is strongly encouraged to secure MBE and WBE participation through the purchase of those goods or services when opportunities are available. For additional information regarding Leon County's Minority, Women and Small Business Enterprise Policy, or to obtain a listing of certified MWBE's, please contact Shanea Wilks, MWSBE Director, at 1800-3 N. Blair Stone Road, Tallahassee, FL 32308, by telephone at (850) 606-1650; fax (850) 606-1651 or by e-mail [wilkssh@leoncountyfl.gov](mailto:wilkssh@leoncountyfl.gov).

#### B. Equal Opportunity/Affirmative Action Requirements

The contractors and all subcontractors shall agree to a commitment to the principles and practices of equal opportunity in employment and to comply with the letter and spirit of federal, state, and local laws and regulations prohibiting discrimination based on race, color, religion, national region, sex, age, handicap, marital status, and political affiliation or belief.

For federally funded projects, in addition to the above, the contractor shall agree to comply with Executive Order 11246, as amended, and to comply with specific affirmative action obligations contained therein.

In addition to completing the Equal Opportunity Statement, the Respondent shall include a copy of any affirmative action or equal opportunity policies in effect at the time of submission.

### VIII. INSURANCE

Respondent's attention is directed to the insurance requirements below. Respondents should confer with their respective insurance carriers or brokers to determine in advance of bid submission the availability of insurance certificates and endorsements as prescribed and provided herein. If an apparent low bidder fails to strictly comply with the insurance requirements, that bidder may be disqualified from award of the contract, or otherwise found non-responsive.

Respondent procure and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Respondent, his agents, representatives, employees, or subcontractors. The cost of such insurance shall be included in the Respondent's pricing.

#### 1. Minimum Limits of Insurance

Contractor shall maintain limits no less than:

- a. General Liability: \$1,000,000 Combined Single Limit for bodily injury and property damage per occurrence with a \$2,000,000 annual aggregate. Completed operations coverage will be provided for a period of three (3) years beyond termination and/or completion of the project. Coverage must include bodily injury and property damage, including Premise/Operations: a per location aggregate, Broad Form Contractual liability; Broad Form Property Damage; Fire Legal liability; Independent Contractors coverage; Cross Liability & Severability of Interest Clauses; and Personal Injury (deleting employee and contractual exclusions), and coverage for explosion, collapse, and underground (X,C,U).
- b. Automobile Liability: One Million and 00/100 (\$1,000,000.00) Dollars combined single limit per accident for bodily injury and property damage. **(Non-owned, Hired Car)**.

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- c. Workers' Compensation Employers Liability: Insurance covering all employees meeting Statutory Requirements in compliance with the applicable state and federal laws and Employer's Liability with a limit of \$500,000 per accident, \$500,000 disease policy limit, \$500,000 disease each employee. **Waiver of Subrogation in lieu of Additional Insured is required.**
- d. Professional Liability Insurance, including errors and omissions: for all services provided under the terms of this agreement with minimum limits of One Million and 00/100 (\$1,000,000.00) Dollars per occurrence; or claims made form with "tail coverage" extending four (4) years beyond the term of the agreement. Proof of "tail coverage" must be submitted with the invoice for final payment. In lieu of "tail coverage", Contractor may submit annually to the County a current Certificate of Insurance proving claims made insurance remains in force throughout the same four (4)-year period.
- e. Umbrella: \$5,000,000 combined single limit for bodily injury and property damage combined per occurrence and annual aggregate. The coverage shall provide excess coverage for employer's liability, general liability, including completed operations and auto liability.
- f. Installation Floater: In the amount of the estimated cost of materials necessary to complete the contract. Should include temporary location, job site, and in transit coverage.
- g. Mobile Equipment (Contractors Equipment) coverage should be in place while job is in process. Equipment should be covered whether owned, leased, borrowed, or rented by contractor or by employees of the contractor.

2. Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the County. At the option of the County, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the County, its officers, officials, employees and volunteers; or the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

3. Other Insurance Provisions

The policies are to contain, or be endorsed to contain, the following provisions:

- a. General Liability and Automobile Liability Coverages (**County is to be named as Additional Insured**).
  1. The County, its officers, officials, employees and volunteers are to be covered as additional insureds as respects; liability arising out of activities performed by or on behalf of the Contractor, including the insured's general supervision of the Contractor; products and completed operations of the Contractor; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protections afforded the County, its officers, officials, employees or volunteers.
  2. The Contractor's insurance coverage shall be primary insurance as respects the County, it officers, officials, employees and volunteers. Any insurance of self-insurance maintained by the County, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it. Contractor hereby waives subrogation rights for loss or damage against the county.
  3. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the county, its officers, officials, employees or volunteers.
  4. The Contractor's insurance shall apply separately to each insured against whom claims

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is made or suit is brought, except with respect to the limits of the insurer's liability.

5. Companies issuing the insurance policy, or policies, shall have no recourse against the County for payment of premiums or assessments for any deductibles with are all at the sole responsibility and risk of Contractor.

b. All Coverages

Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the County.

4. Acceptability of Insurers

Insurance is to be placed with insurers with a Best's rating of no less than A:VII.

5. Verification of Coverage

Contractor shall furnish the County with certificates of insurance and with original endorsements effecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the County before work commences. The County reserves the right to require complete, certified copies of all required insurance policies at any time.

6. Subcontractors

Contractors shall include all subcontractors as insureds under its policies or shall furnish separate certificates and endorsements for each subcontractor. All coverages for subcontractors shall be subject to all of the requirements stated herein.

## IX. TRAVEL EXPENSES

Consultant travel which is not covered within the scope of the consultant's contract and which is billed separately to the County on a cost reimbursement basis must receive prior approval and will be reimbursed in accordance with the Leon County Travel Policy. Travel expenses shall be limited to those expenses necessarily incurred in the performance of a public purpose authorized by law to be performed by the Leon County Board of County Commissioners and must be within limitations described herein and in Ch. 112.06, Florida Statutes. Consultants and contractors, traveling on a cost reimbursement basis, must have their travel authorized by the department head from whose budget the travel expenses will be paid and the County Administrator.

## X. ETHICAL BUSINESS PRACTICES

- A. Gratuities. It shall be unethical for any person to offer, give, or agree to give any County employee, or for any County employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, or preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or performing in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter, subcontract, or to any solicitation or proposal therefor.
- B. Kickbacks. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

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- C. The Board reserves the right to deny award or immediately suspend any contract resulting from this proposal pending final determination of charges of unethical business practices. At its sole discretion, the Board may deny award or cancel the contract if it determines that unethical business practices were involved.

**XI. AGREEMENT:**

After the proposal award, the County will, at its option, prepare a purchase order or an agreement specifying the terms and conditions resulting from the award of this bid. Every procurement of contractual services shall be evidenced by a written agreement. The respondent will have five calendar days after receipt to acknowledge the purchase order or execute the agreement.

The performance of Leon County of any of its obligations under the purchase order or agreement shall be subject to and contingent upon the availability of funds lawfully expendable for the purposes of the purchase order or agreement for the current and any future periods provided for within the bid specifications.

**XII. PURCHASES BY OTHER PUBLIC AGENCIES:**

With the consent and agreement of the successful vendor(s), purchases may be made under this solicitation by other governmental agencies or political subdivisions within the State of Florida. Such purchases shall be governed by the same pricing, terms and conditions stated herein with no deviations allowed. This agreement in no way restricts or interferes with the right of any public agency or political subdivision to bid any or all of the items or services independently.

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**PROPOSAL RESPONSE COVER SHEET**

This page is to be completed and included as the cover sheet for your response to the Request for Proposals.

The Board of County Commissioners, Leon County, reserves the right to accept or reject any and/or all bids in the best interest of Leon County.

Shelly W. Kelley, Purchasing Director

Kristin Dozier, Chairman  
Leon County Board of County Commissioners

This solicitation response is submitted by the below named firm/individual by the undersigned authorized representative.

BY \_\_\_\_\_  
(Firm Name)  
\_\_\_\_\_  
(Authorized Representative)  
\_\_\_\_\_  
(Printed or Typed Name)

ADDRESS \_\_\_\_\_  
\_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

TELEPHONE \_\_\_\_\_

FAX \_\_\_\_\_

**ADDENDA ACKNOWLEDGMENTS: (IF APPLICABLE)**

Addendum #1 dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum #2 dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum #3 dated \_\_\_\_\_ Initials \_\_\_\_\_

Please indicate the categories that you are responding to/bidding on:

- a. Electrical \_\_\_\_\_
- b. Mechanical \_\_\_\_\_
- c. Plumbing \_\_\_\_\_
- d. Structural \_\_\_\_\_
- e. Site Civil \_\_\_\_\_
- f. Architectural \_\_\_\_\_
- g. Interior Design \_\_\_\_\_





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**INSURANCE CERTIFICATION FORM**

To indicate that Bidder/Respondent understands and is able to comply with the required insurance, as stated in the bid/RFP document, Bidder/Respondent shall submit this insurance sign-off form, signed by the company Risk Manager or authorized manager with risk authority.

A. Is/are the insurer(s) to be used for all required insurance (except Workers' Compensation) listed by Best with a rating of no less than A:VII?

YES     NO

Commercial General Liability:    Indicate Best Rating:  
Indicate Best Financial Classification:

---

Business Auto:    Indicate Best Rating:  
Indicate Best Financial Classification:

---

Professional Liability:    Indicate Best Rating:  
Indicate Best Financial Classification:

---

1. Is the insurer to be used for Workers' Compensation insurance listed by Best with a rating of no less than A:VII?

YES     NO

Indicate Best Rating:  
Indicate Best Financial Classification:

If answer is NO, provide name and address of insurer:

2. Is the Respondent able to obtain insurance in the following limits (next page) as required for the services agreement?

YES     NO

Insurance will be placed with Florida admitted insurers unless otherwise accepted by Leon County. Insurers will have A.M. Best ratings of no less than A:VII unless otherwise accepted by Leon County.



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**CERTIFICATION REGARDING DEBARMENT, SUSPENSION,  
AND OTHER RESPONSIBILITY MATTERS  
PRIMARY COVERED TRANSACTIONS**

1. The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:
  - a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - b) Have not within a three-year period preceding this been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statues or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of these offenses enumerated in paragraph (1)(b) of this certification; and
  - d) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.
3. No subcontract will be issued for this project to any party which is debarred or suspended from eligibility to receive federally funded contracts.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Contractor/Firm

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Containing Supply  
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**AFFIDAVIT CERTIFICATION**  
**IMMIGRATION LAWS**

Leon County will not intentionally award County contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324 A(e) {Section 274a(e) of the Immigration and Nationality Act ("INA").

Leon County may consider the employment by any Contractor of Unauthorized Aliens a violation of Section 274A(e) of the INA. **Such violation by the Recipient of the employment provision contained in Section 274A(e) of the INA shall be ground for unilateral cancellation of the contract by Leon County.**

BIDDER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

Company Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

Personally known \_\_\_\_\_

\_\_\_\_\_  
NOTARY PUBLIC

OR Produced identification \_\_\_\_\_

Notary Public - State of \_\_\_\_\_

\_\_\_\_\_  
(Type of identification)

My commission expires: \_\_\_\_\_

\_\_\_\_\_  
Printed, typed, or stamped commissioned name of notary

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

**LEON COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

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**LOCAL VENDOR CERTIFICATION**

The undersigned, as a duly authorized representative of the vendor listed herein, certifies to the best of his/her knowledge and belief, that the vendor meets the definition of a "Local Business." For purposes of this section, "local business" shall mean a business which:

- a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six (6) months immediately prior to the issuance of the request for competitive bids or request for proposals by the County; and
- b) Holds any business license required by Leon County (or one of the other local counties), and, if applicable, the City of Tallahassee; and
- c) Is the principal offeror who is a single offeror; a business which is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.

Please complete the following in support of the self-certification and submit copies of your County and City business licenses. Failure to provide the information requested will result in denial of certification as a local business.

|   |                |
|---|----------------|
| Business Name:  |                |
| Current Local Address:  | Phone:<br>Fax: |
| If the above address has been for less than six months, please provide the prior address. |                |
| Length of time at this address:   |                |
| Home Office Address:  | Phone:<br>Fax: |

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

STATE OF \_\_\_\_\_  
COUNTY \_\_\_\_\_  
OF \_\_\_\_\_

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

By \_\_\_\_\_ of \_\_\_\_\_

(Name of officer or agent, title of officer or agent) (Name of corporation acknowledging)

a \_\_\_\_\_ Corporation, on behalf of the corporation. He/she is personally known to me

(State or place of  
incorporation)

or has produced \_\_\_\_\_ as identification.

**Return Completed form with supporting documents to:**

**Leon County Purchasing Division  
1800-3 N. Blair Stone Road  
Tallahassee, Florida 32308**

\_\_\_\_\_  
Signature of Notary

\_\_\_\_\_  
Print, Type or Stamp Name of Notary

\_\_\_\_\_  
Title or Rank

\_\_\_\_\_  
Serial Number, If Any

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**PROPOSAL RESPONSE COVER SHEET**

This page is to be completed and included as the cover sheet for your response to the Request for Proposals.

The Board of County Commissioners, Leon County, reserves the right to accept or reject any and/or all bids in the best interest of Leon County.

Shelly W. Kelley, Purchasing Director

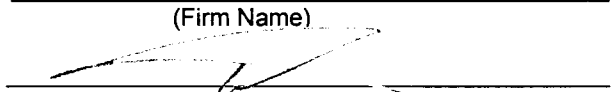
Kristin Dozier, Chairman  
Leon County Board of County Commissioners

This solicitation response is submitted by the below named firm/individual by the undersigned authorized representative.

**Architects | Lewis + Whitlock**

(Firm Name)

BY

  
\_\_\_\_\_  
(Authorized Representative)

**C. Camden Whitlock, AIA, LEED<sup>AP</sup> BD+C**

(Printed or Typed Name)

ADDRESS

**206 W. Virginia Street**

CITY, STATE, ZIP

**Tallahassee, Florida 32301**

E-MAIL ADDRESS

**cwhitlock@think3d.net**

TELEPHONE

**850.942.1718**

FAX

**850.942.2110**

**ADDENDA ACKNOWLEDGMENTS: (IF APPLICABLE)**

Addendum #1 dated **6/23/2014** Initials **PAA**

Addendum #2 dated \_\_\_\_\_ Initials \_\_\_\_\_

Addendum #3 dated \_\_\_\_\_ Initials \_\_\_\_\_

Please indicate the categories that you are responding to/bidding on:

- a. Electrical \_\_\_\_\_
- b. Mechanical \_\_\_\_\_
- c. Plumbing \_\_\_\_\_
- d. Structural \_\_\_\_\_
- e. Site Civil \_\_\_\_\_
- f. Architectural **X**
- g. Interior Design **X**

## Architects | Lewis + Whitlock

July 10, 2014

Leon County Board of County Commissioners  
Purchasing Division  
1800-3 N Blairstone Road  
Tallahassee, Florida 32308

**Re: RFP# BC-06-26-14-41: Request for Proposal for Architectural, Engineering, Interior Design and Related Services, Continuing Supply**

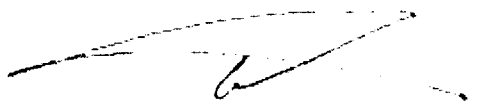
Dear Leon County Board of County Commissioners:

It is a pleasure for Architects | Lewis + Whitlock (AL+W) to submit our proposal and qualifications for the above-referenced Leon County continuing supply services contract project.

AL+W's 15+ years of experience serving as project Architect to our continuing service contract and repeat clients has provided us with an unparalleled knowledge in managing the vast range of projects encountered under this type of contract. Such projects typically include: renovations, alterations, additions, code corrections, site assessments, building surveys, programming and planning studies. Our team knows how to successfully manage the issues that are encountered with these types of projects such as: identification of underground utilities, scheduling construction in and around user occupied buildings, conducting site and building accessibility assessments, upgrading code deficiencies and providing economical design solutions on limited budgets and schedules. We feel like we have developed an inherent understanding of these projects, yet we are constantly mindful that attention to detail and quick turnaround are the keys to success. As the attached submittal illustrates, we have recent relevant experience, and we have the staffing expertise and ability to manage your projects and begin immediately.

Architects | Lewis + Whitlock is committed to creating design solutions that provide functional and economical, yet distinctive results. We approach your project with a profound sense of responsibility. We are prepared to deliver services that exceed your expectations and respect your schedule and budget. It is our hope that we have the opportunity to continue our working relationship with you.

Sincerely,  
Architects | Lewis + Whitlock



C. Camden Whitlock, AIA, LEED<sup>AP</sup> BD+C  
Principal



T A B L E O F C O N T E N T S



|           |                                       |
|-----------|---------------------------------------|
| SECTION A | APPLICANT INFORMATION                 |
| SECTION B | EXECUTIVE SUMMARY                     |
| SECTION C | ABILITY OF PROFESSIONAL PERSONNEL     |
| SECTION D | PROJECT EXPERIENCE                    |
| SECTION E | WILLINGNESS TO MEET SCHEDULE & BUDGET |
| SECTION F | CURRENT AND PROJECTED WORKLOAD        |
| SECTION G | APPROACH TO THE PROJECT               |
| SECTION H | REQUIRED FORMS                        |

A. APPLICANT INFORMATION

1. FIRM NAME & LOCATION

**Architects | Lewis + Whitlock**  
206 W Virginia Street  
Tallahassee, Florida 32301

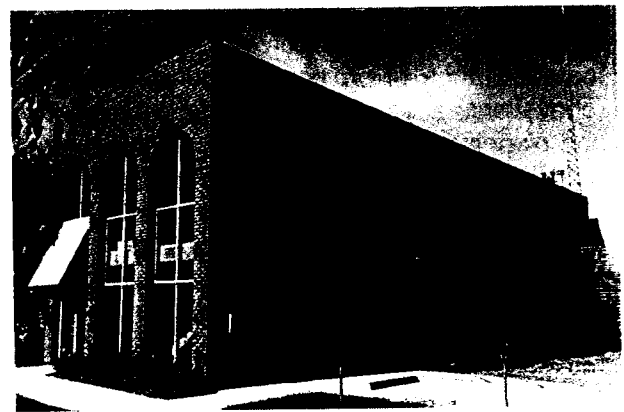
Phone: 850.942.1718  
Fax: 850.942.2110

Email: [cwhitlock@think3d.net](mailto:cwhitlock@think3d.net)

This is not a joint-venture.

2. LOCATION OF OFFICE PERFORMING WORK

All work will be performed and coordinated out of our one office located at the address listed above.



## 1. FIRM SUMMARY

Architects: Lewis + Whitlock is an S-Corporation incorporated in the State of Florida.

Founded in January of 2000 by Rodney Lewis and Camden Whitlock, AL+W offers an expansive array of project experience including new and renovation projects in governmental, commercial offices, higher education, health-care, recreation facilities, retail, multi-family housing, residential, pre-school, banking, campus development, and faith-based facilities.

The majority of AL+W's experience comes from projects under continuing service contracts. Over the past decade, AL+W has managed well over 400 projects for our continuing contract clients including, the Leon County Board of County Commissioners, the Florida Department of Management Services, Florida State University, Florida A & M University and Leon County Schools. In addition, many of our small projects are for repeat clients, and this diverse experience has provided us with an unparalleled knowledge in managing the vast range of projects encountered under this type of contract. Such projects typically include: renovations, alterations, additions, code corrections, site assessments, building surveys, programming and planning studies. Our team knows how to successfully manage the issues that are encountered with these types of projects such as: identification of underground utilities, scheduling construction in and around user occupied buildings, conducting site and building accessibility assessments, upgrading code deficiencies and providing economical design solutions on limited budgets and schedules. We feel like we have developed an inherent understanding of these projects, yet we are constantly mindful that attention to detail and quick turnaround are the keys to success. As a result of our vast experience with minor projects, we understand the necessity for flexibility, responsiveness, cost and quality control.

As is the nature of most minor projects, renovation efforts require thorough code investigation. It is not uncommon for AL+W to investigate the relative codes for a given project and meet with code officials prior to submittal of a proposal to the client so that we can gain a thorough understanding of the project scope. As part of our standard practice, construction documents issued by AL+W include a detailed code summary as well as life safety plans that helps to facilitate the plan review process.

**CONTINUING CONTRACT / REPEAT CLIENTS**

- FLORIDA DEPARTMENT OF MANAGEMENT SERVICES | 2001 to Present
- FLORIDA STATE UNIVERSITY | 2000 to Present
- FLORIDA A & M UNIVERSITY | 2011 to Present
- LEON COUNTY SCHOOL BOARD | 2007 to Present
- LEON COUNTY BOARD OF COUNTY COMMISSIONERS | 2011 to Present
- CAPITAL HEALTH PLAN | Since 2000
- PREMIER BANK | Since 2006
- TALCOR | Since 2002
- WESTMINSTER OAKS | Since 2007



**AUTHORIZED REPRESENTATIVES**

**C. Camden Whitlock, AIA | LEED<sup>AP</sup> BD+C**  
President  
206 W. Virginia Street  
Tallahassee, FL 32301  
850.942.1718 x 301-voice  
850.942.2110-fax  
Email: cwhitlock@think3d.net



**Rodney L. Lewis, AIA**  
Vice-President  
206 W. Virginia Street  
Tallahassee, FL 32301  
850.942.1718 x 303-voice  
850.942.2110-fax  
Email: rlewis@think3d.net



**DECLARATION**

The information provided in this submittal of qualifications in response to the Request for Proposals for Architectural and Interior Design Services; Continuing Supply (BC-06-26-14-41) is in all respects fair and in good faith without collusion or fraud. I further certify that I, Rodney L. Lewis, have authority to bind this document as principal proponent for Architects: Lewis + Whitlock, PA.

\_\_\_\_\_  
C. Camden Whitlock, AIA LEED<sup>AP</sup> BD+C  
Principal  
Architects | Lewis + Whitlock

July 10, 2014

1. AL+W STAFF SIZE & AVAILABILITY

Currently there are a total of 12 professional staff members available to meet the demands of the Leon County Continuing Supply contract for Architectural and Interior Design Services. At any given time during the contract period, any one or combination of several staff members will be available to provide services on short-notice for the small to medium size projects that are contemplated in this contract.

|                          |     |   |
|--------------------------|-----|---|
| R                        | ALA | R |
| Principals Architects:   | 2   |   |
| Additional Architect:    | 1   |   |
| Interior Designer:       | 1   |   |
| Project Managers:        | 4   |   |
| Drafters Designers:      | 4   |   |
| Support Staff Marketing: | 1   |   |


2. Please see resumes on the following pages.

AL+W REGISTRATION

STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
 BOARD OF ARCHITECTURE & INTERIOR DESIGN

LICENSE NUMBER  
 AR0015053

The ARCHITECT  
 Named below IS LICENSED  
 Under the provisions of Chapter 481 FS  
 Expiration date FEB 28 2015



WHITLOCK CHARLES CAMDEN  
 226 W VIRGINIA STREET  
 TALLAHASSEE FL 32301

RICK SCOTT  
 GOVERNOR


ISSUED 02/11/2013 SEQ # L130210002615  
 DISPLAY AS REQUIRED BY LAW

KEN LAWSON  
 SECRETARY

STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
 BOARD OF ARCHITECTURE & INTERIOR DESIGN

LICENSE NUMBER  
 ID0007146

The INTERIOR DESIGNER  
 Named below IS LICENSED  
 Under the provisions of Chapter 481 FS  
 Expiration date FEB 28 2015



WHITLOCK ROBBYNN DEANNE  
 557 LITCHFIELD COURT  
 TALLAHASSEE FL 32312

RICK SCOTT  
 GOVERNOR


ISSUED 02/20/13 SEQ # L13020000968  
 DISPLAY AS REQUIRED BY LAW

KEN LAWSON  
 SECRETARY

STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
 BOARD OF ARCHITECTURE & INTERIOR DESIGN

LICENSE NUMBER  
 AR0019607

The ARCHITECT  
 Named below IS LICENSED  
 Under the provisions of Chapter 481 FS  
 Expiration date FEB 28 2015



LEWIS RODNEY LEE  
 206 WEST VIRGINIA STREET  
 TALLAHASSEE FL 32301

RICK SCOTT  
 GOVERNOR


ISSUED 02/18/2013 SEQ # L130210001279  
 DISPLAY AS REQUIRED BY LAW

KEN LAWSON  
 SECRETARY

STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
 BOARD OF ARCHITECTURE & INTERIOR DESIGN

LICENSE NUMBER  
 AR001759

The ARCHITECT  
 Named below IS LICENSED  
 Under the provisions of Chapter 481 FS  
 Expiration date FEB 28 2015



LAYARD MICHAEL HAYS  
 2142 ARMISTEAD ROAD  
 TALLAHASSEE FL 32308

RICK SCOTT  
 GOVERNOR

ISSUED 08/11/2013 SEQ # L130810000105  
 DISPLAY AS REQUIRED BY LAW

KEN LAWSON  
 SECRETARY

U.S. Green Building Council  
 LEED Accredited Professional

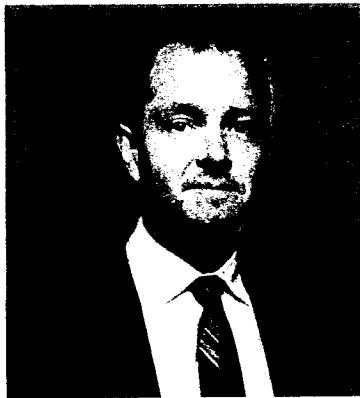
Camden Whitlock

LEED ACCREDITED PROFESSIONAL

U.S. Green Building Council  
 LEED Accredited Professional

Sean Morgan

LEED ACCREDITED PROFESSIONAL



# Camden Whitlock, AIA, LEED AP

Principal

Project Architect

Architects | Lewis + Whitlock

Time with AL+W 14 years

Time with other firms: 11 years

Current Assignments

FSU Dirac Plaza

FSU Dirac Starbucks



## Project Experience

### Domi Ventures Incubator | Tallahassee, Florida

This renovation of an existing 7000 sf warehouse building worked within the original brick shell to carve out inspirational spaces for Tallahassee's newest incubator space. It is a testament to our team's ability to provide quality design with a limited budget and a quick schedule.

Pro Bono Service Role in Project: Principal-in-Charge

### Leon County Court Annex | Tallahassee, Florida

The 15,900 square foot project includes two courtrooms, litigation chambers, jury room, court building support on the first floor. The second floor includes Guardian Ad Litem administrative office space, a 15-person conference room and 4,000 sf of shell space. Building shell improvements include a new roof and new windows. The project site was redesigned to provide new landscape islands meeting local environmental standards while at the same time improving accessibility for the impaired.

Construction cost: \$2 million Role in Project: Principal, Project Designer and Project Manager

### Florida Capitol ADA Upgrades | D/S Continuing Contract - Tallahassee, Florida

After completion of an ADA Study, AL+W was commissioned to undertake design and construction of the first phase of the recommended improvements including ramps and restrooms. Design of the expansion of the 22nd floor restrooms required keen attention to detail, and appreciation for the hallowed grounds of the Capitol Complex resulted in a unique serpentine design solution for the new ADA ramp at the Monroe Street crossing

Construction Cost: \$400,000 Role in Project: Principal, Project Designer and Project Manager

### Florida Capitol ADA Upgrades Study | D/S Continuing Contract - Tallahassee, Florida

The study consists of analysis of portions of the Florida Capitol Building which appear to be deficient in terms of meeting the requirements of the 2010 ADA code. Several areas of the building and surrounding site were surveyed for ADA compliance. Any areas that were shown to be insufficient will be further examined and design solutions will be presented to the owner for review.

Study Fee Role in Project: Principal-in-Charge, Sr. Project Manager

### FSU Hoffman Teaching Labs | FSU Continuing Contract - Tallahassee, Florida

This project includes a renovation of the floor's Chemistry labs that followed a study conducted by AL+W. The study further determined a conceptual plan for improvements and provided a corresponding cost assessment, code analysis, as well as design and construction schedules for project completion. The scope of this renovation project includes: masonry partitions, doors, door hardware, flooring, suspended ceiling, paint, fume hoods, laboratory casework, and laboratory equipment.

Construction Cost: \$78,000 Role in Project: Principal, Project Designer and Project Manager



# Rodney Lewis, AIA

Principal  
Senior Project Manager Architect  
**Architects | Lewis + Whitlock**

Time with AL+W 14 years  
Time with other firms: 13 years

**Current Assignments**  
FSU Athletics Master Plan  
FSU Eppes 4th Floor (CA)

## Project Experience

**Leon County Jail Renovations | Leon County Continuing Contract - Tallahassee, Florida**  
The work includes replacement of 166 showers, modification of existing psychiatric observation cells and an outdoor exercise area, enclosing and conditioning of exterior corridors and replacement of windows in the administrative wing.

Project Budget: \$1.6 million. Role in Project: Principal-in-Charge.

**Warren Building Renovations | FSU Continuing Contract - Tallahassee, Florida**  
AL+W provided programming and space planning for this project, working with the FSU School of Communication Science and Disorders. The fully renovated facility includes the School's Clinic, Offices, Labs, Audiology Suite, Faculty, Seminar Rooms and Administration. Construction Documents CA was provided handicap ramp, mechanical yard, roof, building skin, foundation water proofing, interior partitioning, finishes, mechanical system and electrical system.

Construction Cost: \$5 million. Role in Project: Principal, Project Manager Architect, Construction Administration

**Eppes Building Renovations | FSU Continuing Contract - Tallahassee, Florida**  
This was an interior renovation to a historic building. Prior to the current renovation, the lower three floors had not been renovated in any significant way since the 1960's. The building heating system was outdated, and air conditioning was provided locally through window units and restrooms existing on just the lower floors. The fourth floor had undergone more recent renovation efforts to include newer finishes and removing asbestos containing materials. As a result of this project, all asbestos materials were removed from the building.

Construction Cost: \$3.7 million. Role in Project: Principal, Project Manager Architect, Construction Administration

**Carlton Building Study + Renovation | DSS Continuing Contract - Tallahassee, Florida**  
The 15,900 square foot project includes two courtrooms, litigation chambers, jury room, court building support on the first floor. The second floor includes Guardian Ad Litem administrative office space, a 15-person conference room and 4,000 sf of shell space. Building shell improvements include a new roof and new windows. The project site was redesigned to provide new landscape islands meeting local environmental standards while at the same time improving accessibility for the impaired.

Construction cost: \$2 million. Role in Project: Principal, Project Designer and Project Manager

**Buildings 4070 4075 Accessibility Upgrades | DSS Continuing Contract - Tallahassee, Florida**  
The project scope includes exterior and interior modifications to accommodate the +/- 20 handicapped personnel as well as visitors. Some of the modifications include: Providing accessible route from bldg. 4070 to bldg. 4075 (sloping sidewalks outside existing doorways will remain at existing slope); Providing accessible parking: 2 new spaces and accessible loading zones route to building on east side of bldg. 4070; Replacement of break room cabinetry for ADA compliance; Installation of automatic door openers for Training Room in 4075.

Construction Cost: \$200,000. Role in Project: Principal. Project Manager



**Days Layerd, A**  
Design Director  
Designer Project Manager  
**Architects | Lewis + Whitlock**

Time with AL+W 11 years  
Time with other firms: 9 years

**Current Assignments**  
Meridian Point Building  
Masslands Brewery

**Project Experience**

**Domi Ventures Incubator | Tallahassee, Florida**

This renovation of an existing 7000 sf warehouse building worked within the original brick shell to carve out inspirational spaces for Tallahassee's newest incubator space. It is a testament to our team's ability to provide quality design with a limited budget and a quick schedule.

Pro Bono Service Role in Project: Project Designer

**Leon County Court Annex | Tallahassee, Florida**

The 15,900 square foot project includes two courtrooms, litigation chambers, jury room, court building support on the first floor. The second floor includes Guardian Ad Litem administrative office space, a 15-person conference room and 4,000 sf of shell space. Building shell improvements include a new roof and new windows. The project site was redesigned to provide new landscape islands meeting local environmental standards while at the same time improving accessibility for the impaired.

Construction cost: \$2 million Role in Project: Designer and Production

**Kaye Scholer Operations Center | Tallahassee, Florida**

Kaye Scholer Operations Center occupies the third floor of a Southwood office building. This renovation consists of an overall reimagining of the interior floor plan. This office acts as a hub of connection offering support services to all Kaye Scholer law offices. The design aims to embrace a universal design, reflecting clean lines, a central node of private offices behind a ribbon of glass – surrounded by open office space. The finishes are based on a white overtone with pops of color to denote the various departments including in this operations center.

Construction cost: \$1 million Role in Project: Designer and Project Manager

**Softball Indoor Practice Facility | FSU Continuing Contract - Tallahassee, Florida**

AL+W was contracted for Schematic Design services to devise a Phase 1 Scheme that incorporated 4 batting nets, equipment storage, and a covered bullpen area within a metal building framework. In addition, a Phase 2 design was developed to depict a 2nd story practice and viewing area, with a ramped connection to the Soccer-Softball Building concourse and an additional vertical access.

Construction Cost: \$450,000 Role in Project: Designer, Production Team Leader

**Florida State Fire College | DSS Continuing Contract - Ocala, Florida**

The primary purposes for this study were to investigate critical building settlement issues, modernize the exterior building façades, and to address courtyard deficiencies. The scope of the study was limited to the Administration Building's main entry, and the Courtyard, defined as the space contained by the Administration Building, the Auditorium, and the Dormitory Cafeteria Building.

Construction Cost: \$2,100,000 (estimated) Role in Project: Designer and Production





**Royn Whitlock,**  
Interior Designer  
Architects | Lewis + Whitlock

Time with AL+W: 9 years  
Time with other firms: 12 years

**Current Assignments**  
FSU Continuing Contract - Eppes Finishes  
Celebration Baptist Church Finishes

**Project Experience**

**Leon County Court Annex | Tallahassee, Florida**

The 15,900 square foot project includes two courtrooms, litigation chambers, jury room, court building support on the first floor. The second floor includes Guardian Ad Litem administrative office space, a 15-person conference room and 4,000 sf of shell space. Building shell improvements include a new roof and new windows. The project site was redesigned to provide new landscape islands meeting local environmental standards while at the same time improving accessibility for the impaired.

Construction cost: \$2 million    Role in Project: Interior Designer

**Kaye Scholer Operations Center | Tallahassee, Florida**

Kaye Scholer Operations Center occupies the third floor of a Southwood office building. This renovation consists of an overall reimagining of the interior floor plan. This office acts as a hub of connection offering support services to all Kaye Scholer law offices. The design aims to embrace a universal design, reflecting clean lines, a central node of private offices behind a ribbon of glass – surrounded by open office space. The finishes are based on a white overtone with pops of color to denote the various departments including in this operations center.

Construction cost: \$1 million    Role in Project: Interior Designer

**FSU Student Success Center, Ph. I & II - Tallahassee, Florida**

This two-phased project consolidated 5 departments formerly spread throughout the FSU campus. Phase 1 was a 48,000 square foot project including a 1,000 s.f. classroom, 7,000 s.f. of program rooms, 10,000 s.f. of office space, and a 3,000 s.f. library, and Phase 2 provides 45,000 square feet for two departments.

Construction Cost: \$21.6 million    Role in Project: Interior Designer

**FSU Strozier Library Commons Renovation | FSU Continuing Contract - Tallahassee, Florida**

The 30,000 sf Library Commons project was a complete renovation of the first floor of the Strozier Library on Florida State's Campus. The new program included spaces for private study rooms, reading areas, an assistive technology area, instruction lab, partner area, circulation, reference, staff offices and a café.

Construction Cost: \$1.75 million.    Role in project: Interior Design

**FSU Heritage Museum at Dodd Hall | FSU Continuing Contract - Tallahassee, Florida**

A highly visible project, Florida State University approached AL+W for Design, Construction Documents, and Construction Administration services to renovate the historic, 3,800 square foot Werkmeister Room in order to create a University Heritage Museum to celebrate the tradition and history of Florida State University. AL+W subsequently designed multiple floor plans, an accented hardwood flooring pattern, a celebrated entry vestibule, sub-floor bracing/stiffening, and coordinated lighting and HVAC upgrades.

Construction Cost: \$445,000.    Role in project: Interior Design



Sean Moran, LEED AP  
Production  
Architects | Lewis + Whitlock

Time with ALW 4 years  
Time with other firms: 1 year

Current Assignments  
Leon County Sheriff's Window Replacement  
Leon County Huntington Oaks Ph II

Project Experience

Leon County Sheriff's Administration Envelope Repairs | Leon County Continuing Contract  
Tallahassee, Florida

The scope of work for this project includes the replacement of 16 windows, 3 broken glazing panels, and 2 locations of exterior finish repair. Change orders have added 11 additional windows to be replaced.

Project Budget: \$122,000. Role in Project: Project Manager.

Huntington Oaks Town Center Roof Repair | Leon County Continuing Contract - Tallahassee, Florida

The scope of work for this project includes a new metal roof and associated flashing for areas B and C of the center. Change orders addressed unforeseen structural deficiencies that were discovered in the roof framing.

Project Budget: \$111,000. Role in Project: Project Manager.

Huntington Oaks Town Center Roof Repair, Phase II | Leon County Continuing Contract  
Tallahassee, Florida

The scope of work for this project includes a new metal roof and associated flashing and gutter for area 'A' of the center. Also included is inspection of the existing structural conditions of the re-roof area. Additional Services are pending for unforeseen structural deficiencies that have been found.

Project Budget: \$169,000. Role in Project: Project Manager.

Leon County Sheriff's Administration, Phase II | Leon County Continuing Contract - Tallahassee, Florida

The scope of work for this project includes replacement of the remainder of windows (after phase I) on the main administrative building. This will involve wall/ floor/ ceiling repairs due to water infiltration at existing windows. Also included is patching of cracks and painting of the exterior of the building.

Project Budget: \$456,000. Role in Project: Project Manager.

Softball Indoor Practice Facility | FSU Continuing Contract - Tallahassee, Florida

AL+W was contracted for Schematic Design services to devise a Phase 1 Scheme that incorporated 4 batting nets, equipment storage, and a covered bullpen area within a metal building framework. In addition, a Phase 2 design was developed to depict a 2nd story practice and viewing area, with a ramped connection to the Soccer-Softball Building concourse and an additional vertical access.

Construction Cost: \$450,000 Role in Project: Production

Florida State Fire College | D...S Continuing Contract - Ocala, Florida

The primary purposes for this study were to investigate critical building settlement issues, modernize the exterior building façades, and to address courtyard deficiencies. The scope of the study was limited to the Administration Building's main entry, and the Courtyard, defined as the space contained by the Administration Building, the Auditorium, and the Dormitory Cafeteria Building.

Construction Cost: 2,100,000 (estimated) Role in Project: Production



**Articheels**

Project Manager  
**Architects | Lewis + Whitlock**

Time with AL+W: 1 year  
Time with other firms: 18 years

**Current Assignments**

- FA U Minor Projects (3 all at 100 CD s)
- D S Continuing Contract - (3 all at 100 CD s)
- Leon County Courthouse IS
- Leon County Jail Disc. Improvements

**Project Experience**

**Leon County Jail Renovations | Leon County Continuing Contract | Tallahassee, Florida**

The work includes replacement of 166 showers, modification of existing psychiatric observation cells and an outdoor exercise area, enclosing and conditioning of exterior corridors and replacement of windows in the administrative wing.

Project Budget: \$1.6 million. Role in Project: Project Manager.

**Florida D S Parking Garage Renovations | D S Continuing Contract - Tallahassee, Florida**

This project includes a wide array of renovations to existing state parking garages in downtown Tallahassee. The work ranges from pressure washing and sealing precast concrete to patching exposed rebar and cracking concrete.

Project Budget: \$720,000. Role in Project: Project Manager.

**FA U Grand Ballroom Interior Renovations | Florida A University Minor Projects Continuing Contract: Tallahassee, Florida**

AL+W is currently performing CA for the renovation of the existing Ballroom.

Project Budget: \$615,000. Role in Project: Project Manager.

**FA U Vet Tech, Quincy, Florida | Florida A University Minor Projects Continuing Contract Tallahassee, Florida**

The project entails construction of a new veterinary clinic and renovation to the existing building.

Project Budget: \$700,000. Role in Project: Project Manager.

**FA U Viticulture | Florida A University Minor Projects Continuing Contract - Tallahassee, Florida**

This project's scope is the construction of a new agricultural equipment storage building, classroom and laboratory.

Project Budget: \$628,000. Role in Project: Project Manager.



**Mike Lamantia, LEED AP**  
Project Manager  
Architects | Lewis + Whitlock

Time with AL+W: 2 years  
Time with other firms: 18 years



**Current Assignments**  
D S Capitol Complex ADA Upgrades (CA)  
Celebration Baptist Church (CA)

**Project Experience:**

**Celebration Baptist Church Core Building Addition, Tallahassee, FL**  
The building's 2,300 square foot Welcome Lobby serves as the campus' hub of activity and first point of contact for visitors each morning. A large welcoming canopy greets visitors at the main, pick-up and drop-off drive aisle. The 21,230 square foot building also contains a Pre-School for 110 children, a subdividable Children's Worship Room for 260 children, and a +/- 5,000 square foot Administrative Suite. Significant complexities are inherent with the project because the planned building lies adjacent to the existing Activities Building. The building is planned for completion in 2014.

Construction Cost: \$4.5 million Role in Project: Project Manager

**Less Lethal Manufacturing Training Facilities | ATEC Less Lethal Systems, Perry, Florida**  
AL+W was responsible for the design and documentation for ATEC Less Lethal Systems Perry Facility which includes a manufacturing component consisting of 8 buildings and 2 bunkers and a training component consisting of 5 buildings, 1 bunker and future exterior shooting ranges.

The project cost was \$8.2 million of which approximately \$5.8 million is allocated to vertical construction with the remaining 2.4 million for site improvements Role in Project: Project Manager

**Florida Capitol ADA Upgrades | D S Continuing Contract - Tallahassee, Florida**  
After completion of an ADA Study, AL+W was commissioned to undertake design and construction of the first phase of the recommended improvements including ramps and restrooms. Design of the expansion of the 22nd floor restrooms required keen attention to detail, and appreciation for the hallowed grounds of the Capitol Complex resulted in a unique serpentine design solution for the new ADA ramp at the Monroe Street crossing

Construction Cost: \$400,000 Role in Project: Construction Administrator

**Florida Capitol Complex - Tallahassee, Florida**  
Complete ADA upgrades to the Capitol complex including public restrooms, water fountains and ADA upgrades to the House, Senate, Old Capitol and Waller Park.

Construction Cost: \$2.5 million Role in Project: Construction Administrator



**Michael Carter**

Designer

**Architects | Lewis + Whitlock**

**Time with AL+W: 2 years**  
**Time with other firms: 2 years**

**Current Assignments**  
FSU Continuing Contract as needed

**Project Experience**

**Florida Capitol ADA Upgrades | D S Continuing Contract - Tallahassee, Florida**

After completion of an ADA Study, AL+W was commissioned to undertake design and construction of the first phase of the recommended improvements including ramps and restrooms. Design of the expansion of the 22nd floor restrooms required keen attention to detail, and appreciation for the hallowed grounds of the Capitol Complex resulted in a unique serpentine design solution for the new ADA ramp at the Monroe Street crossing

Construction Cost: \$400,000 Role in Project: Production

**Florida Capitol ADA Upgrades Study | D S Continuing Contract - Tallahassee, Florida**

The study consists of analysis of portions of the Florida Capitol Building which appear to be deficient in terms of meeting the requirements of the 2010 ADA code. Several areas of the building and surrounding site were surveyed for ADA compliance. Any areas that were shown to be insufficient will be further examined and design solutions will be presented to the owner for review.

Study Fee Role in Project: Production

**FSU Hoffman Teaching Labs | FSU Continuing Contract - Tallahassee, Florida**

This project includes a renovation of the floor's Chemistry labs that followed a study conducted by AL+W. The study further determined a conceptual plan for improvements and provided a corresponding cost assessment, code analysis, as well as design and construction schedules for project completion. The scope of this renovation project includes: masonry partitions, doors, door hardware, flooring, suspended ceiling, paint, fume hoods, laboratory casework, and laboratory equipment.

Construction Cost: \$78,000 Role in Project: Production

**Warren Building Renovations | FSU Continuing Contract - Tallahassee, Florida**

AL+W provided programming and space planning for this project, working with the FSU School of Communication Science and Disorders. The fully renovated facility includes the School's Clinic, Offices, Labs, Audiology Suite, Faculty Seminar Rooms and Administration. Construction Documents (CA) was provided handicap ramp, mechanical yard, roof, building skin, foundation water proofing, interior partitioning, finishes, mechanical system and electrical system.

Construction Cost: \$5 million. Role in Project: Production

**Florida State Fire College | D S Continuing Contract - Ocala, Florida**

The primary purposes for this study were to investigate critical building settlement issues, modernize the exterior building facades, and to address courtyard deficiencies. The scope of the study was limited to the Administration Building's main entry, and the Courtyard, defined as the space contained by the Administration Building, the Auditorium, and the Dormitory Cafeteria Building.

Construction Cost: \$2,100,000 (estimated) Role in Project: Production



## Randall Woods

Designer Production  
Architects | Lewis + Whitlock

Time with ALW: 1 year  
Time with other firms: 1 year

**Current Assignments**  
FSU Athletics Master Plan  
D S Holland Electrical Improvements

### Project Experience

**Leon County Jail Renovations | Leon County Continuing Contract - Tallahassee, Florida**  
The work includes replacement of 166 showers, modification of existing psychiatric observation cells and an outdoor exercise area, enclosing and conditioning of exterior corridors and replacement of windows in the administrative wing.

Project Budget: 1.6 million. Role in Project: Production

**Eppes Building Renovations | FSU Continuing Contract - Tallahassee, Florida**  
This was an interior renovation to a historic building. Prior to the current renovation, the lower three floors had not been renovated in any significant way since the 1960's. The building heating system was outdated, and air conditioning was provided locally through window units and restrooms existing on just the lower floors. The fourth floor had undergone more recent renovation efforts to include newer finishes and removing asbestos containing materials. As a result of this project, all asbestos materials were removed from the building.

Construction Cost: 3.7 million. Role in Project: Production

**Carlton Building Study + Renovation | D S Continuing Contract - Tallahassee, Florida**  
The 15,900 square foot project includes two courtrooms, litigation chambers, jury room, court building support on the first floor. The second floor includes Guardian Ad Litem administrative office space, a 15-person conference room and 4,000 sf of shell space. Building shell improvements include a new roof and new windows. The project site was redesigned to provide new landscape islands meeting local environmental standards while at the same time improving accessibility for the impaired.

Construction cost: 2 million. Role in Project: Production

**Buildings 4070 4075 Accessibility Upgrades | D S Continuing Contract - Tallahassee, Florida**  
The project scope includes exterior and interior modifications to accommodate the +/- 20 handicapped personnel as well as visitors. Some of the modifications include: Providing accessible route from bldg. 4070 to bldg. 4075 (sloping sidewalks outside existing doorways will remain at existing slope); Providing accessible parking: 2 new spaces and accessible loading zones route to building on east side of bldg. 4070; Replacement of break room cabinetry for ADA compliance; Installation of automatic door openers for Training Room in 4075.

Construction Cost: 200,000. Role in Project: Production



**Alana Taylor**

Designer

Architects | Lewis + Whitlock

Time with AL+W: 2 years

**Current Assignments**

FSU Dirac Starbucks

FSU Dirac - Dittmer Plaza

FSU Dunlap Renovations

**Project Experience**

**Domi Ventures Incubator | Tallahassee, Florida**

This renovation of an existing 7000 sf warehouse building worked within the original brick shell to carve out inspirational spaces for Tallahassee's newest incubator space. It is a testament to our team's ability to provide quality design with a limited budget and a quick schedule.

Pro Bono Service | Role in Project: Production

**Kaye Scholer Operations Center | Tallahassee, Florida**

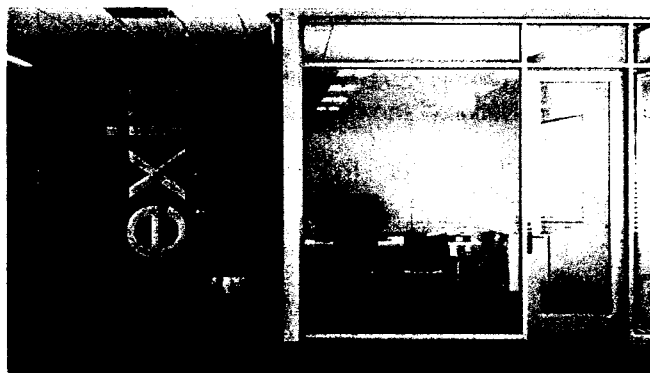
Kaye Scholer Operations Center occupies the third floor of a Southwood office building. This renovation consists of an overall reimagining of the interior floor plan. This office acts as a hub of connection offering support services to all Kaye Scholer law offices. The design aims to embrace a universal design, reflecting clean lines, a central node of private offices behind a ribbon of glass – surrounded by open office space. The finishes are based on a white overtone with pops of color to denote the various departments including in this operations center.

Construction cost: \$1 million | Role in Project: Production

**FSU Student Union Study | FSU Continuing Contract - Tallahassee, Florida**

AL+W was commissioned by Florida State University to undertake the Master Planning Study of the expansion and relocation of the Student Union. Phase I, the initial step of this multi-phase study, focuses on determining the types and quantities of space that will be required to accommodate the various components anticipated to be a part of the Union over the next 20 years. This study examines current space utilization within the Union, quantifies and organizes the various existing program areas, projects current and future space needs, and assigns an opinion of cost to each department. The Union is comprised of a diverse group of programs and spaces that together form the recreational and social heart of the campus.

Role in Project: Production



### 3. OUTSIDE CONSULTANTS

It has been our experience with similar continuing contracts that not all consultants are suited to work on all projects. Typically, we attempt to select the most qualified consultants to suit the scope of the project. For any given project that is assigned under this continuing supply contract, we propose to work with the Leon County Project Manager to identify the project scope at the very first meeting so that we can make a recommendation to the County. In some cases, the Owner and/or User Representative may have a recommendation that we will in turn give consideration to.

Over our fourteen years experience working under continuing contract projects we have worked with a wide variety of consultants, each selected to meet the requirements of the task at hand. A partial list of consultants that we have incorporated on such projects is as follows:

|                               |                            |
|-------------------------------|----------------------------|
| Allen Nobles & Associates     | LLT Building Corp.         |
| AME Engineering, Inc.         | Lawson Group               |
| Aquatic Design & Engineering  | Markey and Associates      |
| Barkley Consulting Engineers  | McCinniss & Fleming        |
| Bliss & Nyitray               | Merithir Environics        |
| Brailsford & Dunlavy          | Moore Bass Consulting      |
| Control Dynamics              | Patrick Hodges Land Studio |
| Creech Engineers              | Perry Dean Rogers Partners |
| Crossroads Consulting         | Pinnacle Engineering       |
| DEC Engineering               | Populous                   |
| Design Group                  | Rosenbaum Engineering      |
| Dieter Consulting Services    | Sasaki                     |
| DW Landscape Architecture     | Stewart Engineering        |
| Genesis                       | Smith Gilchrist            |
| George Associates Engineering | Southern Earth Sciences    |
| H2 Engineering                | Stevenson Architects       |
| HNTB                          | TLC Engineering            |
| HVAC Services                 | Tomahawk Engineering       |
| JP Structural Engineering     |                            |



EXPERIENCE WITH PROJECTS SIMILAR TO A1917E

**Leon County Courthouse Renovation | Tallahassee, FL**  
 Minor Project Continuing Contract

AL+W's Role: Prime  
 Owner: Leon County Board of County Commissioners  
 Contact: Jeff Williams | 850.606.5000  
 1907 South Monroe Street  
 Tallahassee, FL

Architects: Lewis + Whitlock has had the continuing services contract with Leon County for the past 3 years. This contract has provided a variety of projects. Some highlights from work completed through this contract include:

User: Multiple Users  
 Contacts: John Ward | 850.606.5022  
 Jeff Williams | 850.606.5000  
 Leon County Facilities  
 Maintenance  
 1907 South Monroe Street  
 Tallahassee, FL

**Bank of America Building 7th Floor Renovations**

This scope of work for this project involved the partial renovation of approximately 5,750 sf of the 7th Floor of the Bank of America Building located at 358 South Calhoun Street, Tallahassee, Florida.

**Team Members Roles:**

Construction Cost: \$186,000

|             |                     |
|-------------|---------------------|
| R. Lewis    | Principal-in-Charge |
| S. Morgan   | Project Manager     |
| D. Micheels | Project Manager     |
| D. Harter   | Production          |

**Leon County Jail Renovations**

The work includes replacement of 166 showers, modification of existing psychiatric observation cells and an outdoor exercise area, enclosing and conditioning of exterior corridors and replacement of windows in the administrative wing.

Project Budget: \$1.6 million

**Leon County Sheriff's Administration Window Repairs**

The scope of work for this project includes the replacement of 16 windows, 3 broken glazing panels, and 2 locations of exterior finish repair. Change orders have added 11 additional windows to be replaced.

Project Budget: \$122,000.

**Continental Bank Town Center Roof Repair**

The scope of work for this project includes a new metal roof and associated flashing for areas B and C of the center. Change orders addressed unforeseen structural deficiencies that were discovered in the roof framing.

Project Budget: \$111,000.

**Continental Bank Town Center Roof Repair, Phase II** | The scope of work for this project includes a new metal roof and associated flashing and gutter for area 'A' of the center. Also included is inspection of the existing structural conditions of the re-roof area. Additional Services are pending for unforeseen structural deficiencies that have been found.

Project Budget: \$169,000.

**Leon County Sheriff's Administration, Phase III**

The scope of work for this project includes replacement of the remainder of windows (after phase I) on the main administrative building. This will involve wall/ floor/ ceiling repairs due to water infiltration at existing windows. Also included is patching of cracks and painting of the exterior of the building.

Project Budget: \$456,000.

# EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

RECUR | Tallahassee, FL

AL+W's Role: Pro Bono Design Services  
Owner: Leon County Florida  
Contact: Mr. John Ward  
Leon County Facilities Management  
1907 South Monroe Street  
Tallahassee, FL

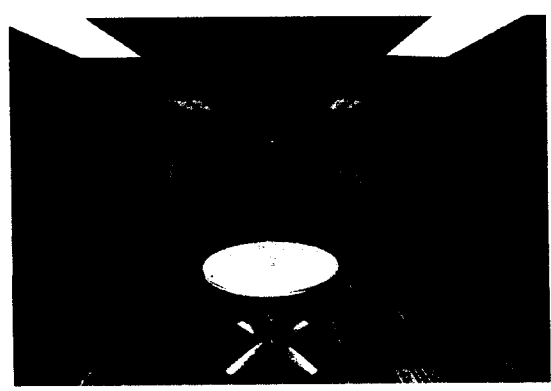
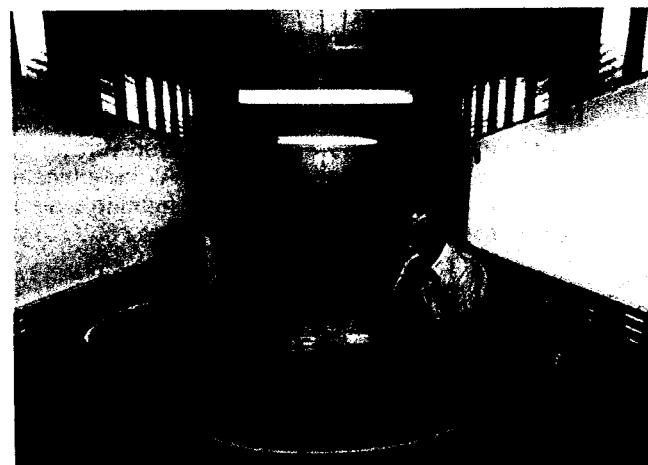
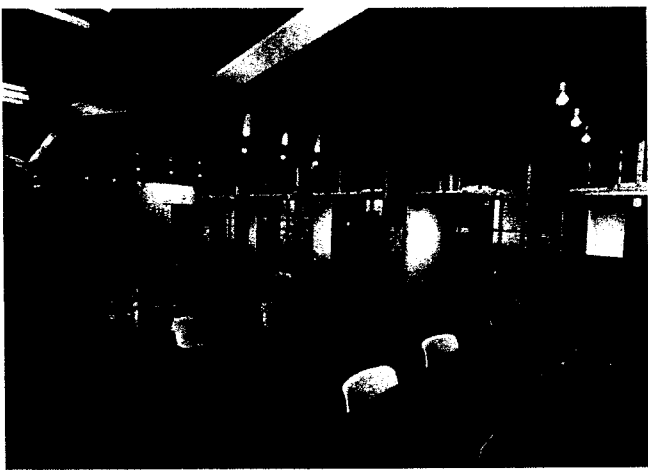
User: Domi Ventures, Nichah Widen | 812.322.9117  
918 Railroad Avenue  
Tallahassee, FL  
Date: 2014

- Team Members Roles:
- C. Whitlock Principal-in-Charge
  - H. Layerd Project Manager Designer
  - A. Taylor Production

**Project Description:**  
The Domi Ventures project, an incubator for start-up businesses, represents our firm's contribution to the growing creative environment in Tallahassee. This renovation of an existing 7000 sf warehouse building worked within the original brick shell to carve out inspirational spaces for Tallahassee's newest incubator space. It is a testament to our team's ability to provide quality design with a limited budget and a quick schedule.

While maintaining most portions of existing walls and restrooms, the empty warehouse area was transformed into a variety of open office space, private offices, college incubator studios, and even a phone booth. The palette of construction materials may seem common, but each material was used in a unique manner, OSB panels framing the storefront, corrugated plastic panels acting as separation between offices. An undulating gypsum soffit exists above the open office space pierced with linear gaps revealing suspended lighting.

The kitchen space incorporates a floating ceiling, a re-used bar element and provides an open floor area for socializing. The client's involvement through every step of the project made this renovation a true merging of ideas, which shows in each unique detail of the space.



EXPERIENCE WITH PROJECTS SIMILAR SIZE AND TYPE

LEON COUNTY COURTS COMPLEX | Tallahassee, FL  
14,000 gsf - Renovation | 1,900 gsf - Addition

AL+W's Role: Prime  
Owner: Leon County Board of County Commissioners  
Contact: John Ward | 850.606.5022  
1907 S Monroe Street  
Tallahassee, FL  
User: Leon County Traffic Court | 850.606.1228  
1920 Thomasville Road  
Tallahassee, FL  
Date: 2010  
Cost: 1,980,000

Team Members Roles:

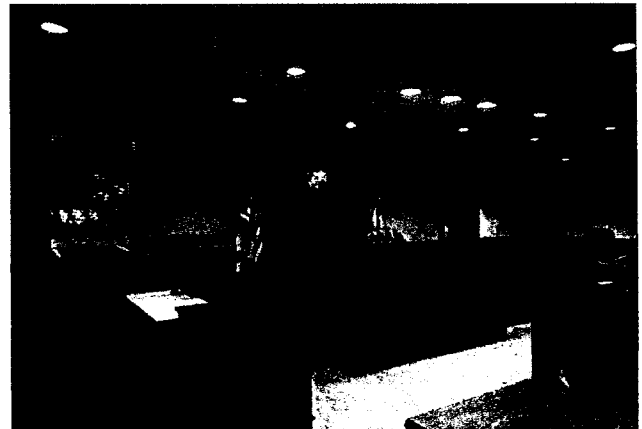
C. Whitlock Principal-in-Charge  
Project Architect  
H. Layerd Project Manager

Project Description:

The Leon County Court Annex project included renovation of an existing two-story, 14,000 gross square foot (gsf) building and a 1,900 gsf addition. Site work included demolition of an existing one-story addition, re-design of the parking lot, storm water conveyance, site lighting and new landscaping.

Renovation of the existing structure provided for a new metal roof system, two new court rooms, judge's chambers, conference rooms, an office suite for the County's Guardian Ad Litem Program, accessible rest rooms, and shell space for future tenant build-out.

The 1,900 gsf addition accommodated a new secure entry point to the building as well as improved vertical accessibility with the addition of new elevator. All new mechanical and electrical systems were provided, featuring an innovative, super-efficient variable refrigerant volume HVAC system.



EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

**WARREN BUILDING RENOVATION | Tallahassee, FL**  
Florida State University Minor Project Continuing Contract

AL+W's Role: Prime  
Owner: Florida State University  
Contact: Larry Rubin | 850.644.8314  
969 Learning Way | Henden Hall Bldg A  
Tallahassee, FL

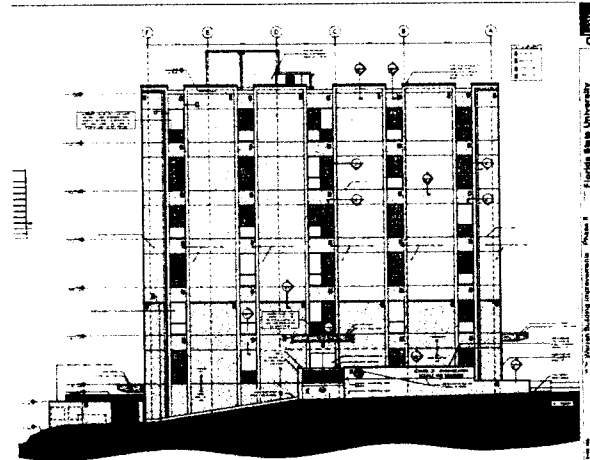
User: FSU School of Communication Science  
Disorders | 850.645.9371  
201 W. Bloxham  
Tallahassee, FL

Date: 2012  
Cost: 5,000,000

**Team Members & Roles:**

R. Lewis Principal-in-Charge  
Project Architect

S. Morgan CAD Production



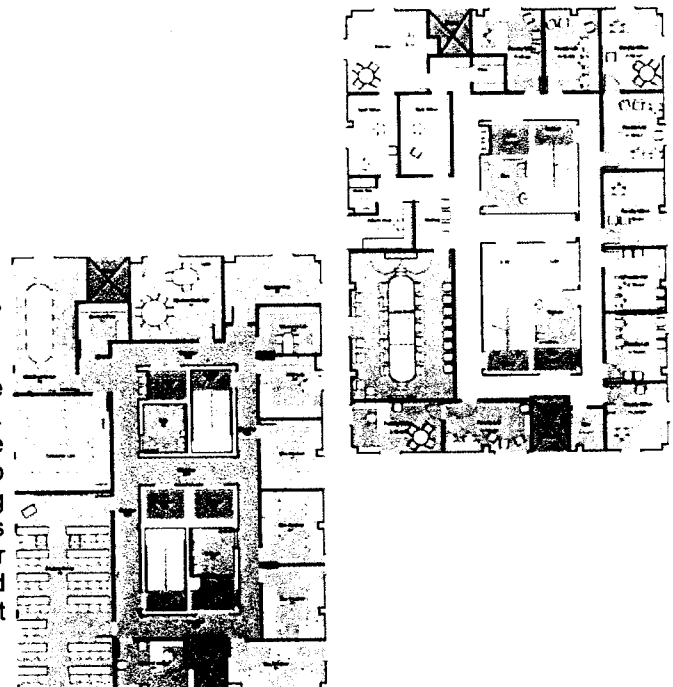
**Project Description:**

The Fuller Warren Building located at 201 Bloxham Street in Tallahassee, Florida was turned over to Florida State University in 2010. Originally constructed in 1965, the 7 story 36,900 square foot building had roof leaks, no exterior wall insulation, compromised foundation water proofing and utility systems that were well beyond their expected lifespan.

Architects: Lewis + Whitlock provided programming and space planning for the project, working with the FSU School of Communication Science and Disorders. The fully renovated facility includes the School's Clinic, Offices, Labs, Audiology Suite, Faculty, Seminar Rooms and Administration. AL+W provided construction documents and construction administration for the following scope: asbestos abatement; handicap ramp, mechanical yard, roof, building skin, foundation water proofing, interior partitioning, finishes, mechanical system and electrical system.

At the roof level: the two over roofs (retrofit metal and rigid insulation with multi-ply) were removed from the original built-up roof system. All rooftop HVAC equipment and rooftop storage rooms were removed. A new 2-ply modified bitumen roof over rigid insulation and protection board was provided over the original BUR.

The building interior was gutted due to the extensive amount of asbestos containing material and wood furring. Based on code evaluation and a Performance Compliance Method the project was able to achieve savings due to the installation of a new sprinkler system and removing the existing fire pump. The building infrastructure was modified to be served from two exterior chillers, a boiler and an exterior pump. New mechanical rooms were placed in the basement with vertical duct chases cut throughout the floors above.



EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

ARCHITECTURAL | TALLAHASSEE, FL

AL+W's Role: Prime  
Owner: Kaye Scholer, LLP  
Contact: Peter Loren, Facilities Manager  
425 Park Avenue  
New York, N

User: Kaye Scholer, Tallahassee Operations Center  
Lara Stubbs | 850.807.3700  
3800 Esplanade Way, Suite 300  
Tallahassee, FL  
Date: 2014

Team Members Roles:

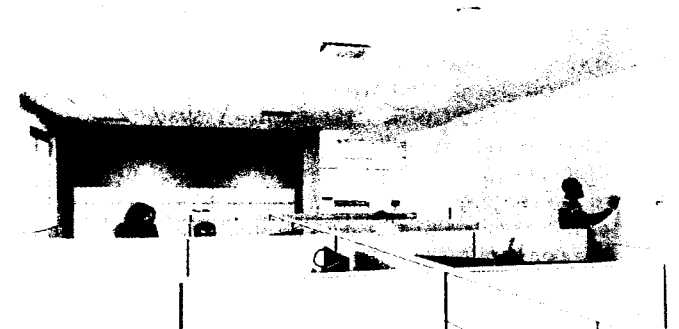
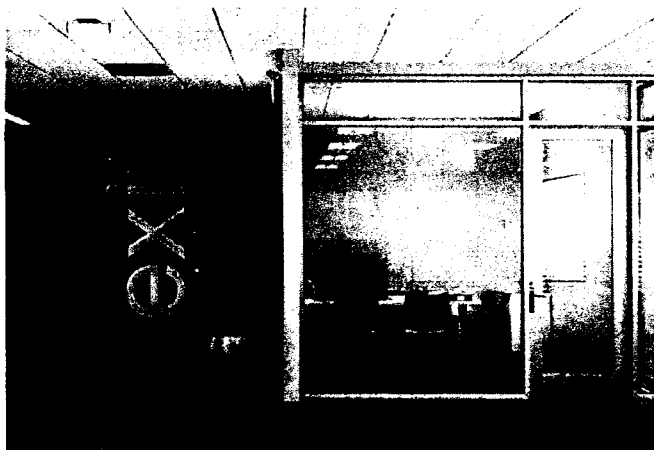
- C. Whitlock Principal-in-Charge  
Project Manager
- H. Layerd Project Designer
- R. Whitlock Interior Designer
- A. Taylor Production

Project Description:

Kaye Scholer Operations Center occupies the third floor of a Southwood office building. This renovation consists of an overall reimagining of the interior floor plan. Kaye Scholer is an international law firm with offices around the globe, from New York and Chicago, to Shanghai.

This office acts as a hub of connection offering support services to all Kaye Scholer law offices. The design aims to embrace a universal design, reflecting clean lines, a central node of private offices behind a ribbon of glass – surrounded by open office space. The finishes are based on a white overtone with pops of color to denote the various departments including in this operations center.

This project, with an interior entirely meant to link the occupants to lawyers worldwide, is linked back to Tallahassee through the expansive windows looking out at parks and homes in Tallahassee's Southwood community.



EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

**Lewis + Whitlock Architects + Interiors | Tallahassee, FL**  
Florida State University Minor Project Continuing Contract

AL+W's Role: Prime  
Owner: Florida State University  
Contact: Kimberley Strobel-Ball | 850.644.8314  
969 Learning Way | Hendenhall Bldg A  
Tallahassee, FL

User: Julia Zimmerman, Dean of University Libraries  
850.644.5211  
314 Strozier Library, Tallahassee, FL  
Date: 2010  
Cost: 1,750,000

Team Members Roles:

- R. Lewis Principal-in-Charge  
Project Architect  
Project Manager  
Construction Administrator
- R. Whitlock Interior Designer

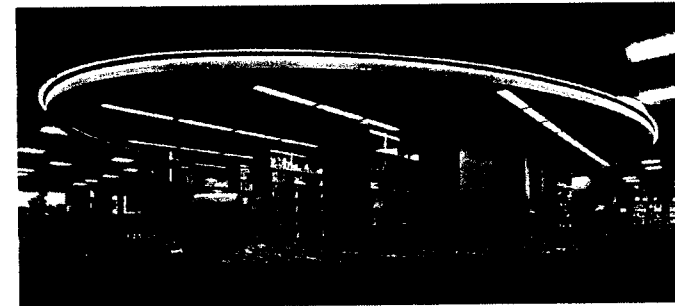
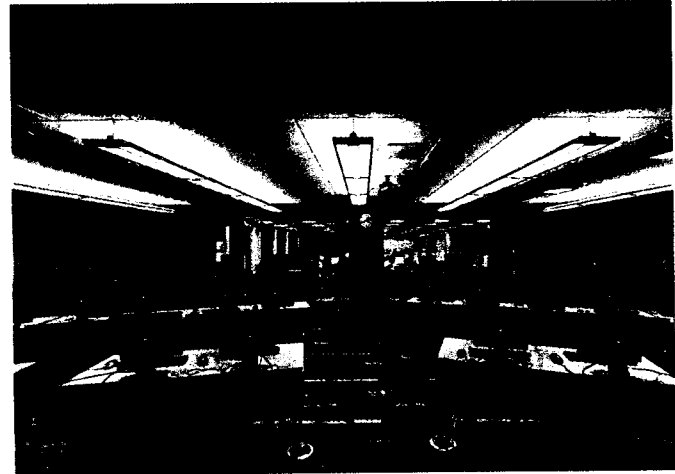
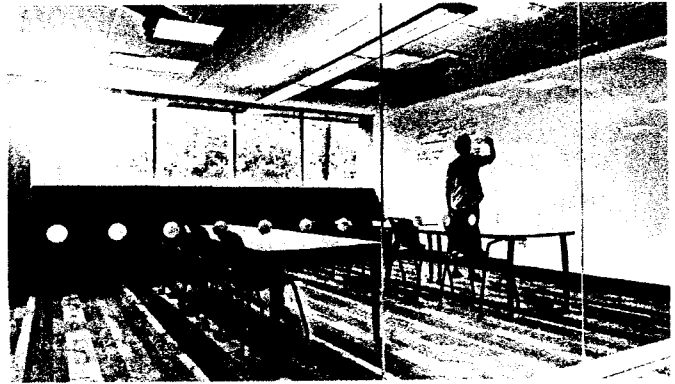
Project Description:

The 30,000 sf Library Commons project was a complete renovation of the first floor of the Strozier Library on Florida State's Campus. The existing floor plan design included large stack areas, several linear computer workstations (farms), and circulation and reference staff areas on opposite sides of the building with little space in the building dedicated to student study space.

AL+W was charged with not only opening up the floor, but also updating the 'feel' of the space to be a more contemporary, yet comfortable place for the students to study and spend time. The new program included spaces for private study rooms, reading areas, an assistive technology area, instruction lab, partner area, circulation, reference, staff offices and a café. The café area includes a Starbucks Coffee Shop that will provide support for food service to the café. The café will also serve as a space for additional programming and events within the Library.

Key design implementations include floor patterns and ceiling transitions to facilitate traffic flow, use of wall colors to facilitate way finding, ceiling enhancements to offset lower ceiling height conditions, opening the study rooms along the exterior wall to general floor space with glass walls to allow natural light to filter in, flexible and mobile furnishings.

The project delivery method was construction management.



# EXPERIENCE WITH PROJECTS SIMILAR TO THIS TYPE

ALL RCR Architects | Tallahassee, FL  
Florida State University Minor Project Continuing Contract

AL+W's Role: Prime  
Owner: Florida State University  
Contact: Biff Barles | 850.694.2454  
969 Learning Way | Hendenhall Bldg A  
Tallahassee, FL

User: Thomas Blomberg, Dean, College of  
Criminology & Criminal Justice  
850.644.4050  
145 Convocation Way, Tallahassee, FL

Date: 2014  
Cost: 3,700,000

### Team Members Roles:

- R. Lewis      Principal-in-Charge  
                  Project Architect  
                  Project Manager  
                  Construction Administrator
- H. Layerd     Project Designer
- S. Morgan     Production

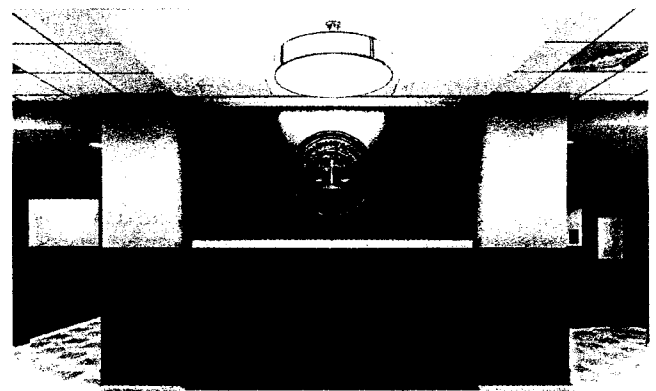
### Project Description:

Prior to the current renovation, the lower three floors had not been renovated in any significant way since the 1960's. The building heating system was outdated, and air conditioning was provided locally through window units and restrooms existing on just the lower floors.

The fourth floor had undergone more recent renovation efforts to include newer finishes and removing asbestos containing materials. As a result of this project, all asbestos materials were removed from the building.

The existing corridors had high volumes and often no ceilings, they were lined with tile wainscot and most doors have large transom openings that were filled with wood panels. Originally these transoms would have been glass and used to help move natural ventilation through the building. Due to the required addition of central heating and air conditioning, the addition of ceilings to conceal piping and duct work; the transoms required modification. The design solution provided for shortening the transoms and using the remaining above-ceiling opening to distribute piping and duct work. This option eliminated new penetrations through existing wire lath stucco walls. New wood framed glass transom panels were installed to provide additional daylighting from perimeter office areas into the corridors.

All ceilings were upgraded to conceal above ceiling piping and new mechanical equipment. A combination of gypsum bulkheads and suspended tile ceiling was used. All corridor and public entrance doors were upgraded to original era appropriate raised panel doors with oil rubbed finished accessible hardware. ***This project received an historic preservation award from the Tallahassee Trust for Historic Preservation.***



EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

**ALL ABOUT CA | Tallahassee, FL**  
Florida State University Minor Project Continuing Contract

AL+W's Role: Prime  
Owner: Florida State University  
Contact: Gary Feldman | 850.645.4990  
969 Learning Way | Hendenhall Bldg A  
Tallahassee, FL

User: Bernie Waxman, Assoc. Athletics Director  
850.644.9940  
403 Stadium Drive, Tallahassee, FL  
Date: 2011  
Cost: 1,000,000

Team Members Roles:

R. Lewis Principal-in-Charge  
Project Architect  
Project Manager  
Construction Administrator

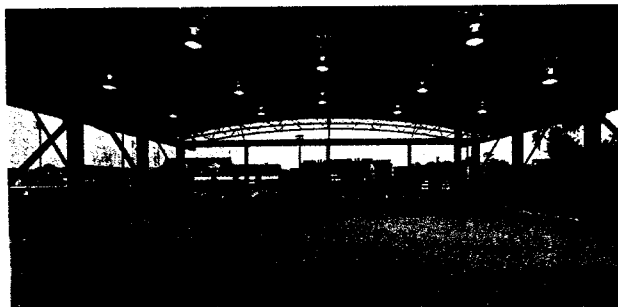
H. Layerd Project Designer

Project Description:

To aid the FSU Women's Softball Team in player development and in competing with the top collegiate softball programs in the country an Indoor Softball Batting Cage is needed to protect the players from inclement weather. AL+W was contracted for Schematic Design services to devise a Phase 1 Scheme that incorporated 4 batting nets, equipment storage, and a covered bullpen area within a metal building framework.

In addition, a Phase 2 design was developed to depict a 2nd story practice and viewing area, with a ramped connection to the Soccer-Softball Building concourse and an additional vertical access. Phase 2 is a long term planning goal of the program.

Building and site issues taken into consideration for this project are structural and roof systems suitable for the addition of a 2nd floor at a future date, the potential relocation of underground stormwater piping and other utilities, protection of a mature live oak tree East of the facility location, abuse resistant lighting and air circulation systems, screening to protect non-hitters from softballs, durable surfaces and finishes, padding on the field-side of the bullpen screens, retractable batting cage netting, retaining walls to prevent water intrusion, proper ceiling heights to accommodate practice routines, and adherence to historic FSU design guidelines and aesthetics. *This project received a Design Achievement award from AIA Tallahassee.*





EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

REAR REAR ALL | Tallahassee, FL  
 Florida State University Minor Project Continuing Contract

AL+W's Role: Prime  
 Owner: Florida State University  
 Contact: Ben Smith | 850.644.2902  
 969 Learning Wayendenhall Bldg A  
 Tallahassee, FL

User: Liaryanski, Vice President for University  
 Relations  
 850.644.1000  
 600 W. College Ave., Tallahassee, FL

Date: 2010  
 Cost: 445,000

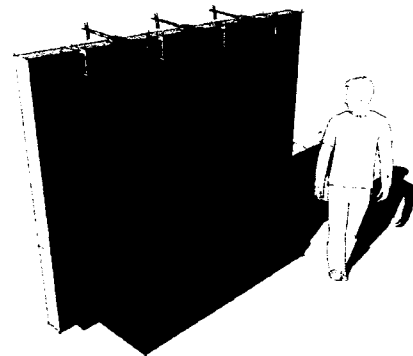
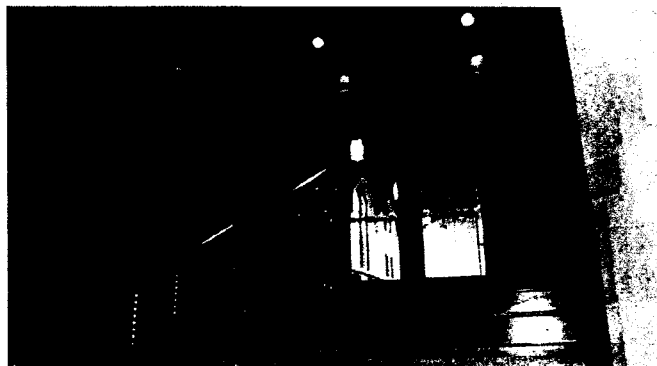
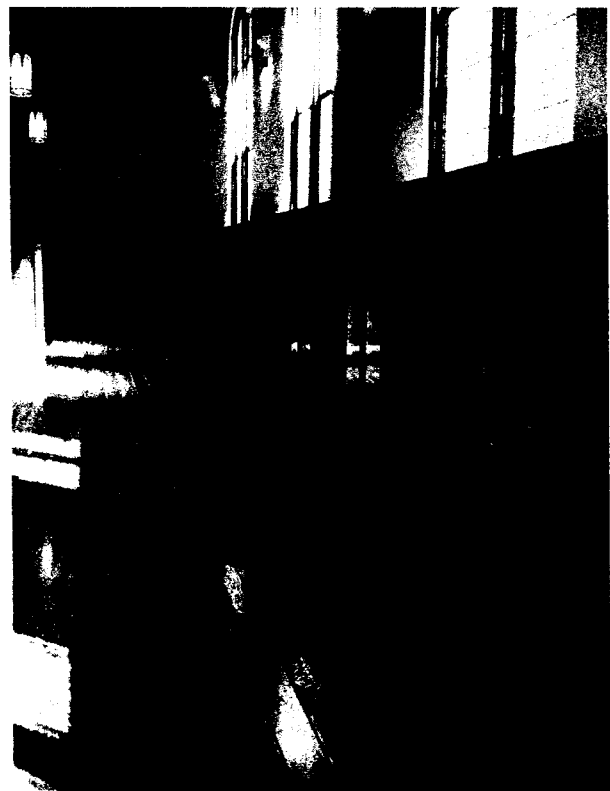
Team Members Roles:

- R. Lewis Principal-in-Charge  
Project Architect
- H. Layerd Project Designer  
Project Manager  
Construction Administrator
- R. Whitock Interior Designer

Project Description:

The Werkmeister Reading Room, in the original West wing of Dodd Hall, was constructed in 1925 and housed the University library until 1956. It has since been the home to the College of Arts and Sciences, the Philosophy Department, and WFSU-TV. A highly visible project, Florida State University approached AL+W for Design, Construction Documents, and Construction Administration services to renovate the historic, 3,800 square foot Werkmeister Room in order to create a University Heritage Museum to celebrate the tradition and history of Florida State University.

AL+W conducted design workshops with FSU departments and alumni groups to achieve a vision and concept for the museum which allows for versatile functionality and emphasizes the rich, architectural, character of the space. AL+W subsequently designed multiple floor plans, an accented hardwood flooring pattern, a celebrated entry vestibule, sub-floor bracing/stiffening, and coordinated lighting and HVAC upgrades. *This project received historic preservation awards from both the Florida Heritage Foundation and the Tallahassee Trust for Historic Preservation.*



EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

**LEWIS + WHITLOCK ARCHITECTS | Ocala, FL**  
**Florida Department of Management Services | Minor Project Continuing Contract**

AL+W's Role: Prime  
 Owner: State of Florida, D/S  
 Contact: Eugenio Nicoloso | 850.488.2521  
 Construction, Planning and Design manager  
 Real Estate Development management,  
 Project management Oversight  
 4050 Esplanade Way  
 Tallahassee, FL

User: Barry B. Baker, Bureau Chief | 352.369.2833  
 Division of State Fire Marshal  
 Bureau of Fire Standards and Training  
 11655 NW Gainesville Road, Ocala, FL

Date: 2012  
 Cost: Study fee

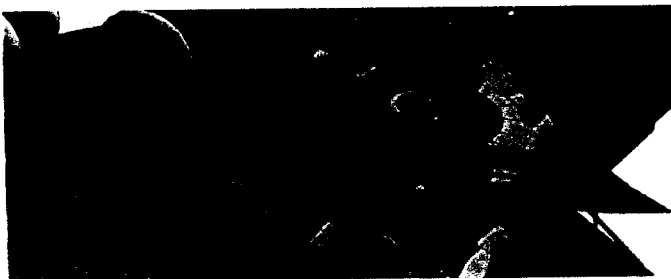
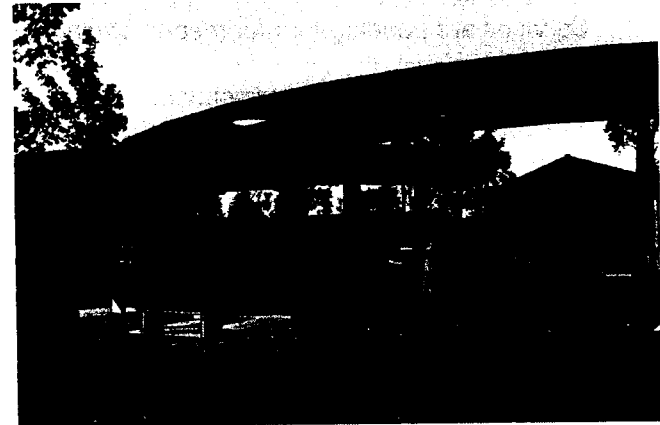
**Team Members Roles:**

|           |  |
|-----------|--|
| R. Lewis  | Principal-in-Charge<br>Project Architect |
| H. Layerd | Project Designer<br>Project Manager      |
| S. Morgan | Production                               |

**Project Description**

The State of Florida Department of Management Services (D/S) commissioned Architects: Lewis + Whitlock (AL+W) to complete a conceptual design study for improvements to the Florida State Fire College campus, located in Ocala, Florida. The primary purposes for this study were to investigate critical building settlement issues, modernize the exterior building facades, and to address courtyard deficiencies. The scope of the study was limited to the Administration Building's main entry, and the Courtyard, defined as the space contained by the Administration Building, the Auditorium, and the Dormitory Cafeteria Building.

The final solution that AL+W presented addressed the building entries, windows and doors, the courtyard, memorial, landscape, and lobby cupola. Each of these issues was studied through research and an iterative design process. The final design provides for needed accessibility, efficiency, and structural upgrades. It does this while providing for a reasonable phased development, and supporting the image of the College as a progressive institution.



## 2. PROJECTS CURRENTLY UNDER CONTRACT

### **Leon County Continuing Supply Contract for Architectural Services**

Architects: Lewis + Whitlock has held the continuing supply contract with the Leon County Board of County Commissioners since 2011. Current project under this contract include:

#### Leon County Jail Improvements | July 2015

Renovation to existing showers, E and G pod and ground floor corridor walls. Also includes administrative office window replacement.

#### Leon County Sheriff's Administration Envelope Repairs | Sept 2014

The scope of work for this project includes the replacement of 16 windows, 3 broken glazing panels, and 2 locations of exterior finish repair. Change orders have added 11 additional windows to be replaced.

#### Huntington Oaks Town Center Roof Repair, Phase II | July 2014

The scope of work for this project includes a new metal roof and associated flashing and gutter for area 'A' of the center. Also included is inspection of the existing structural conditions of the re-roof area. Additional Services are pending for unforeseen structural deficiencies that have been found.

#### Leon County Sheriff's Administration, Phase II | July 2014

The scope of work for this project includes replacement of the remainder of windows (after phase I) on the main administrative building. This will involve wall/ floor/ ceiling repairs due to water infiltration at existing windows. Also included is patching of cracks and painting of the exterior of the building.

#### Leon County Courthouse GIS | Dec 2014

Renovation of the information system areas of the Leon County Courthouse.

### **Florida State University Minor Projects Continuing Contract**

#### FSU Athletics Master Plan | July 2014

Cataloging existing facilities and future needs to create a introductory master plan.

#### FSU Eppes 4th Floor (CA) | Aug 2014

Minor renovation of an existing academic suite for a new tenant.

#### FSU Dirac Plaza | Dec 2014

Improvements to thoroughfare between Dirac and Dittmer Science buildings. Creating new walkway and improved ADA access.

#### FSU Dirac Starbucks | Sept 2014

Construction Administration on site for Starbucks project within existing Dirac Science Library.

### **Florida A&M University Minor Projects Continuing Contract**

#### FAU Grand Ballroom (CA) | Dec 2014

AL+W performing CA for the renovation of the existing Ballroom.

#### FAU Vet Tech, Quincy, Florida (bidding) | April 2015

Currently in the Design Development. Project entails construction of a new veterinary clinic and renovation to the existing building.

#### FAU Viticulture (bidding) | March 2015

Construction of a new agricultural equipment storage building, classroom and laboratory.

1. EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

2. PROJECTS CURRENTLY UNDER CONTRACT, CONTINUED

**Florida Minor Projects Continuing Contract**

- D.S Carlton Building Sprinkler Renovation
- D.S Holland Electrical Renovations
- D.S Garage Repair Construction Administration

**Capitol Complex ADA CA Phase 2 and Phase 3 Project**

CD's are complete. Renovation of the public restrooms on floor LL-5 to bring them up to current Accessibility Code.

**Barres on Main Grasslands Brewery Design and Build**

Brewery with small taproom. Includes equipment layouts and space arranging for storage and circulation of brewing process.

**Meridian Joint Permitting Only**

Renovation of existing space to use as dressing and dining space for guest performers at Cascades Park events. CA associated with mechanical upgrades.

**The Core Celebration Artist Church CA Only**

New Activities building situated between existing Sanctuary and Admin building. Project includes social space, preschool area, and a future second floor build-out.

2. ABILITY TO ABSORB NEW PROJECTS FROM THIS CONTRACT

As illustrated by the project completion dates listed above, almost all of the the current projects are scheduled to end prior to the end of 2014. The majority of them will be complete in the next few months, and most are currently bidding or in construction and not in design phases. In short, we have the staffing and the availability to take on several projects immediately.

## 3. EXPERIENCE WITH PROJECTS OF SIMILAR SIZE AND TYPE

### 3-4. UTILIZATION OF CURRENT DESIGN STANDARDS, CODES AND OTHER REGULATORY DIRECTION

One key to insuring that current design standards, codes and regulatory direction are applied to projects is to make sure that key staff are knowledgeable in the subject matter. AL+W encourages all staff to participate in educational opportunities in the field in order to stay abreast of constantly changing codes and standards. This information is shared collaboratively throughout the studio as projects progress through the various phases of development.

Another important step in this process is that each project is reviewed with the appropriate authorities having jurisdiction for the various codes that may come into play on any given project.

The final step in this process is that each project is under the guidance of one of the firms' principals, who will ultimately take the professional liability of sealing the documents. Both Cam Whitlock and Rodney Lewis stay current on the major building code, fire prevention code, ADA regulations through participation in workshops, continuing education courses and seminars.

### 5. BASIC AND SPECIAL RESOURCES

Buildings are no longer designed with the use of free hand sketches then drafted with simple lines and arcs. Today projects are modeled in three dimensional virtual reality, where all major building components are constructed in real time. For more than 10 years, AL+W has been a leader in development of the use of the virtual building model.

Unlike in years past, earlier decisions are required for building systems and components generally requiring a shift in the man hour efforts during the project Design Development phase versus the Construction Document phases. This 'shift' has allowed for AL+W to develop a workflow that includes inter-office coordination review as well as consultant reviews earlier in the process. The end result is a better coordinated set of Construction Documents. This workflow has also allowed AL+W to reduce production time to meet today's accelerated project schedules.

The virtual building model will include walls, roofs, millwork, slabs, ceilings, structure, plumbing and mechanical systems as required; all in three dimensions. With these tools AL+W is able to explore the model; identify and resolve component conflicts during development of the construction documents prior to construction; therefore reducing the potential cost of construction change orders.

We maintain a subscription to BSD Costlink for development of construction budgets and cost estimates and SpecLink for development of project specifications.

## PROJECT SCHEDULES

Quick response is key to the successful administration of minor projects. Often, the need for quick turn around starts with the preparation of the proposal, continues through design and construction documents, culminating with substantial completion and owner occupancy. Factors such as occupant schedules, funding requirements and code-related inspections can all play a role in determining a project's schedule. When it comes to responsiveness, one obvious advantage that AL+W has is an office location in downtown Leon County. The principals of AL+W maintain an active role in all minor projects and are available by cell phone at all times. The principals and project managers at AL+W understand the need for quick response and thorough professional services. As such, we maintain a commitment to providing timely service for continuing supply projects for Leon County.

## PROJECT BUDGETS

Architects: Lewis + Whitlock has an excellent track record of meeting project budgets. We take pride in our success in listening to our clients' needs and integrating their programmatic goals into a functional, distinctive design that is ultimately built within budget and maintains the project's schedule. We have found that our early, aggressive approach to budget control helps to keep projects on track and avoid complications during the Bid Phase.

In today's uncertain economic times, building systems must be efficient, flexible and as straightforward as possible. Architects must develop facilities that minimize maintenance requirements, are easily maintained, and utilize durable interior finishes to provide for a building that will successfully serve the County for many years.

AL+W's approach to developing budgets and cost control are based upon two complementary methods. First, during the schematic design phase a working cost model is developed that will evolve throughout the life of the project. Each major design component is itemized with cost information gathered from the local construction market through the use of recent bid information, as well as specific cost data from local contractors and subcontractors. This model serves as a basis for scope and budget control as the project matures through the design process. Establishing control of scope and budget is critical at the beginning of a project, not after the contract documents are complete and the project is out for bid.

Controlling cost during the construction phase is the second important method of cost control that AL+W utilizes. The key to cost control during this phase is a well coordinated, errors-and-omissions free set of contract documents. AL+W utilizes a highly effective system for efficiently documenting each aspect of a project to produce a high quality product. Particular attention to the coordination of mechanical, electrical and plumbing consultants with the architectural and structural systems is critical and receives the attention that is required during design team reviews at each project milestone. This approach to project documentation provides the basis to our document development.

Establishment of a working relationship between the construction manager and the design team is another important factor in the control of project cost. A team approach between the owner, architect and construction manager allows the architect take an active role during construction so that potential problems can be anticipated and expeditiously resolved.

1. CURRENT WORK LOAD

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**Leon County Sheriff's Administration Envelope Repairs | Sept 2014**

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**Huntington Oaks Town Center Roof Repair, Phase II | July 2014**

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**Leon County Courthouse - IS | Dec 2014**

Renovation of the information system areas of the Leon County Courthouse.

**Florida State University Minor Projects Continuing Contract**

**FSU Athletics Master Plan | July 2014**

Cataloging existing facilities and future needs to create a introductory master plan.

**FSU Eppes 4th Floor (CA) | Aug 2014**

Minor renovation of an existing academic suite for a new tenant.

**FSU Dirac Plaza | Dec 2014**

Improvements to thoroughfare between Dirac and Dittmer Science buildings. Creating new walkway and improved ADA access.

**FSU Dirac Starbucks | Sept 2014**

Construction Administration on site for Starbucks project within existing Dirac Science Library.

**Florida A&M University Minor Projects Continuing Contract**

**FAU Grand Ballroom (CA) | Dec 2014**

AL+W performing CA for the renovation of the existing Ballroom.

**FAU Vet Tech, Quincy, Florida | May 2015**

Currently in the Design Development. Project entails renovation to the existing FAU healthcare complex in Quincy, Florida.

**FAU Viticulture | March 2015**

New construction to the University's horticulture research facility.

1. CURRENT WORK LOAD, CONTINUED

**Florida Minor Projects Continuation Contract**

D. S. Carlton Building Sprinkler Renovation

D. S. Holland Electrical Renovations

D. S. Garage Repair Construction Administration

**Capital Construction Phase 1 and Phase 2**

CD's are complete. Renovation of the public restrooms on floor LL-5 to bring them up to current Accessibility Code.

**Cascades on Main Grasslands Brewery Design**

Brewery with small taproom. Includes equipment layouts and space arranging for storage and circulation of brewing process.

**Meridian Joint Permitting Only**

Renovation of existing space to use as dressing and dining space for guest performers at Cascades Park events. CA associated with mechanical upgrades.

**The Core Celebration Artist Church CA Only**

New Activities building situated between existing Sanctuary and Admin building. Project includes social space, preschool area, and a future second floor build-out.

2. ABILITY TO ABSORB NEW PROJECTS FROM THIS CONTRACT

As illustrated by the project completion dates listed above, almost all of the the current projects are scheduled to end prior to the end of 2014. The majority of them will be complete in the next few months, and most are currently bidding or in construction and not in design phases. In short, we have the staffing and the availability to take on several projects immediately.



## APPROACH TO PROJECT

The first step to any project under this contract will be to schedule a meeting with the Owners's Point of Contract and/or the end user to define the project scope and prepare a proposal for the work. This is the point where we will need to determine the need for outside consultants that are well suited for the project scope. Once we have submitted a proposal and it has been accepted, we will conduct a survey of the existing conditions. This is a key step in renovation and repair projects that will make or break the project. Careful observation and documentation is required to make sure that all building components and systems are accounted for. In some cases, if the project schedule is particularly brief, we may begin working on the project immediately to help expedite the schedule while the proposal process is being vetted.

The next step involves the design phase or phases, depending on the size of the project. This step is where the project is developed to meet the needs of the owner/user, code review occurs, consultant coordination, contractor input may be solicited and budget parameters are defined and tested. Once all these parameters have been met, and documents are complete, the project goes into permit review and bids are solicited either by the architect or bid packages are issued by the contractor.

During construction, the project is visited on a minimum weekly basis depending on the scope and schedule. Field reports are issued to all key players. The architect is a key player during construction to make sure that the design intent and code compliance are both maintained. A thorough substantial completion review is conducted to make

sure everything is in place. Project closeout is key to making sure all warranties, training and submittals are taken care of and turned over to the owner for building operation.

THERE ARE NO S ALL PROJECTS  
Every 'small project' requires the same level of attention as a 'large project', if not more.

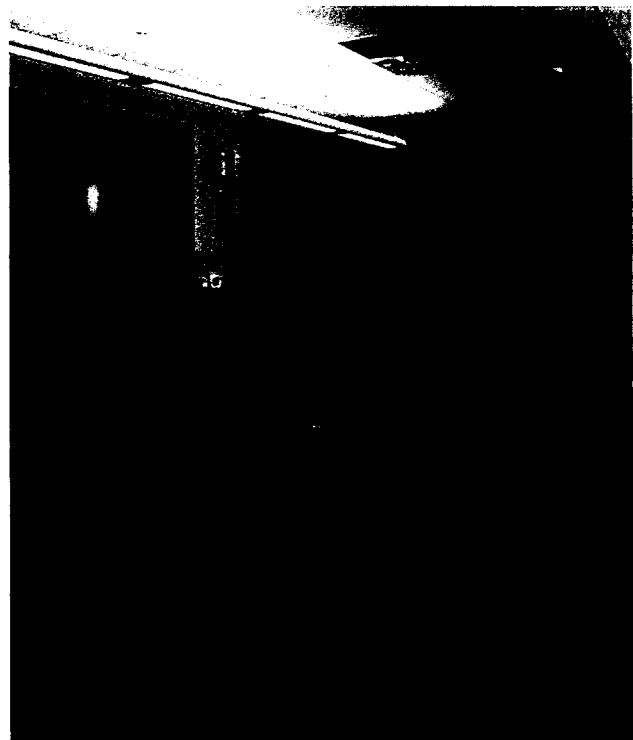
### UNDERSTAND THE PROJECT

Any times spaces are occupied before and during construction, detailed research of all project parameters and coordination among the entire project team, including the owners, users, contractors and design professionals is mandatory.

### TIME IS OF THE ESSENCE

There are often different user groups with a wide variety of needs. There can be a critical deadline for project completion. Construction is often phased with stringent schedule requirements for all trades.

Knowledge of these concepts enables our team to provide timely, well coordinated documents that allows the construction process to proceed with minimal problems.



LEARN ABOUT

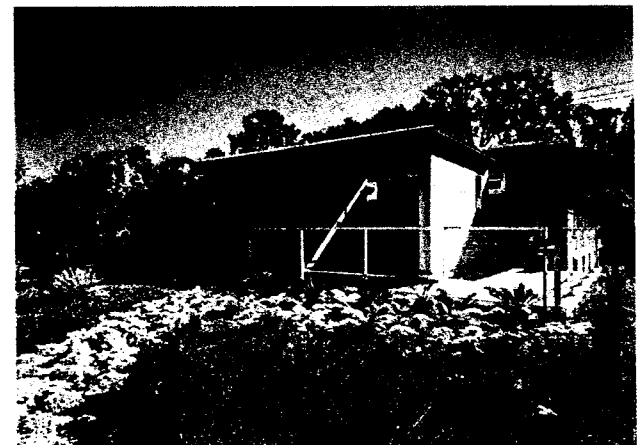
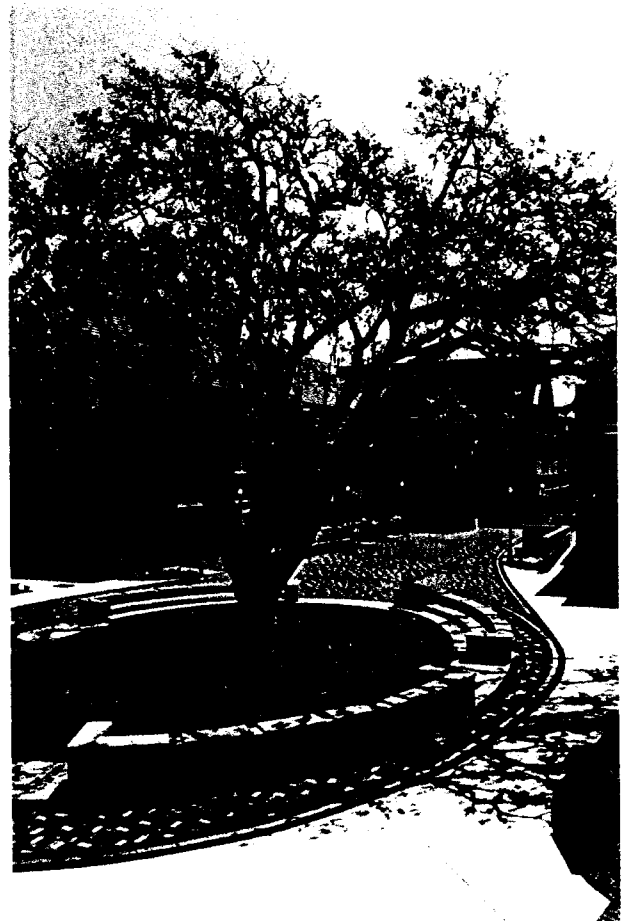
AL+W is committed to the principles of sustainable design and is fully qualified to create LEED certified architecture. Our sustainable design effort is led by Camden Whitlock, AIA LEED AP, ensuring that the projects incorporate appropriate high-performance sustainability standards.

AL+W has two projects that received LEED certification, the Student Success Center, Phase II (LEED Gold Certification), and Urban Green (LEED Gold Certification). Camden Whitlock, AIA, LEED AP, is a certified agent of the Florida Green Building Council, has a membership to the U.S. Green Building Council, and is a Tallahassee Green Building Coalition member, demonstrating commitment to the positive impacts of green design on our local and national built environment.

Not only does AL+W stand for excellent service to the client and to the community, we are taking the lead to help preserve, protect, and enhance our environment.



The FSU Student Success Center, Ph. II, was completed in January of 2010 and recently received LEED Gold certification. The mature Live Oak tree in the top picture was relocated cross-site in order to make Phase II feasible.



LEED Gold Certification

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

---

**EQUAL OPPORTUNITY/AFFIRMATIVE ACTION STATEMENT**

1. The contractors and all subcontractors hereby agree to a commitment to the principles and practices of equal opportunity in employment and to comply with the letter and spirit of federal, state, and local laws and regulations prohibiting discrimination based on race, color, religion, national region, sex, age, handicap, marital status, and political affiliation or belief.
2. The contractor agrees to comply with Executive Order 11246, as amended, and to comply with specific affirmative action obligations contained therein.

Signed:



C. Camden Whitlock, AIA, LEED<sup>AP</sup> BD+C

Title:

President

Firm:

Architects | Lewis + Whitlock

Address:

206 W. Virginia Street, Tallahassee, FL 32301



RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

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Required Coverage and Limits

The required types and limits of coverage for this bid/request for proposals are contained within the solicitation package. Be sure to carefully review and ascertain that bidder/proposer either has coverage or will place coverage at these or higher levels.

Required Policy Endorsements and Documentation

Certificate of Insurance will be provided evidencing placement of each insurance policy responding to requirements of the contract.

Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by Leon County. At the option of Leon County, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects Leon County, its officers, officials, employees and volunteers; or the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

Endorsements to insurance policies will be provided as follows:

Additional insured (Leon County, Florida, its Officers, employees and volunteers) -  
General Liability & Automobile Liability

Primary and not contributing coverage-  
General Liability & Automobile Liability

Waiver of Subrogation (Leon County, Florida, its officers, employees and volunteers) - General Liability,  
Automobile Liability, Workers' Compensation and Employer's Liability

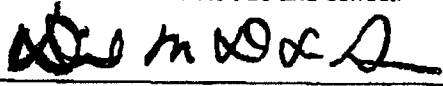
Thirty days advance written notice of cancellation to County - General Liability, Automobile Liability,  
Worker's Compensation & Employer's Liability.

Professional Liability Policy Declaration sheet as well as claims procedures for each applicable policy to be provided

Please mark the appropriate box:

Coverage is in place  Coverage will be placed, without exception

The undersigned declares under penalty of perjury that all of the above insurer information is true and correct.

Name Daniel M. De La Rosa Signature   
Typed or Printed  
Date 07/09/14 Title Vice President  
Authority (Company Risk Manager or Manager with Risk



RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

---

**INSURANCE CERTIFICATION FORM**

To indicate that Bidder/Respondent understands and is able to comply with the required insurance, as stated in the bid/RFP document, Bidder/Respondent shall submit this insurances sign-off form, signed by the company Risk Manager or authorized manager with risk authority.

- A. Is/are the insurer(s) to be used for all required insurance (except Workers' Compensation) listed by Best with a rating of no less than A:VII?

YES     NO

Commercial General Liability:    Indicate Best Rating: **A+**  
Indicate Best Financial Classification:

---

Business Auto:    Indicate Best Rating: **A++**  
Indicate Best Financial Classification:

---

Professional Liability:    Indicate Best Rating:  
Indicate Best Financial Classification:

---

1. Is the insurer to be used for Workers' Compensation insurance listed by Best with a rating of no less than A:VII?

YES     NO

Indicate Best Rating: **A+**  
Indicate Best Financial Classification:

If answer is NO, provide name and address of insurer:

2. Is the Respondent able to obtain insurance in the following limits (next page) as required for the services agreement?

YES     NO

Insurance will be placed with Florida admitted insurers unless otherwise accepted by Leon County. Insurers will have A.M. Best ratings of no less than A:VII unless otherwise accepted by Leon County.

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
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Required Coverage and Limits

The required types and limits of coverage for this bid/request for proposals are contained within the solicitation package. Be sure to carefully review and ascertain that bidder/proposer either has coverage or will place coverage at these or higher levels.

Required Policy Endorsements and Documentation

Certificate of Insurance will be provided evidencing placement of each insurance policy responding to requirements of the contract.

Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by Leon County. At the option of Leon County, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects Leon County, its officers, officials, employees and volunteers; or the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

Endorsements to insurance policies will be provided as follows:

Additional insured (Leon County, Florida, its Officers, employees and volunteers) -  
General Liability & Automobile Liability

Primary and not contributing coverage-  
General Liability & Automobile Liability

Waiver of Subrogation (Leon County, Florida, its officers, employees and volunteers) - General Liability,  
Automobile Liability, Workers' Compensation and Employer's Liability

Thirty days advance written notice of cancellation to County - General Liability, Automobile Liability,  
Worker's Compensation & Employer's Liability.

Professional Liability Policy Declaration sheet as well as claims procedures for each applicable policy to be provided

Please mark the appropriate box:

Coverage is in place  Coverage will be placed, without exception

The undersigned declares under penalty of perjury that all of the above insurer information is true and correct.

Name Teresa Hannie  
Typed or Printed

Signature [Handwritten Signature]

Date 6-19-14

Title Agent  
(Company Risk Manager or Manager with Risk Authority)



RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

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**CERTIFICATION REGARDING DEBARMENT, SUSPENSION,  
AND OTHER RESPONSIBILITY MATTERS  
PRIMARY COVERED TRANSACTIONS**

- 1 The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:
  - a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - b) Have not within a three-year period preceding this been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of these offenses enumerated in paragraph (1)(b) of this certification; and
  - d) Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.
3. No subcontract will be issued for this project to any party which is debarred or suspended from eligibility to receive federally funded contracts.



Signature C. Camden Whitlock, AIA, LEED<sup>AP</sup> BD+C

**President**

Title

**Architects | Lewis + Whitlock**

Contractor/Firm

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
Proposal Number: BC-06-26-14-41  
Opening Date: Thursday, June 26, 2014 at 2:00 PM

**AFFIDAVIT CERTIFICATION**  
**IMMIGRATION LAWS**

Leon County will not intentionally award County contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324 A(e) (Section 274a(e) of the Immigration and Nationality Act ("INA").

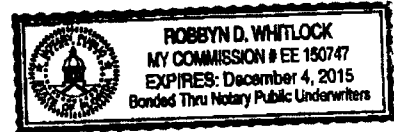
Leon County may consider the employment by any Contractor of Unauthorized Aliens a violation of Section 274A(e) of the INA. Such violation by the Recipient of the employment provision contained in Section 274A(e) of the INA shall be ground for unilateral cancellation of the contract by Leon County.

BIDDER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

Company Name: Architects | Lewis + Whitlock

Signature: [Signature] Title: President  
C. Camden Whitlock, AIA, LEED<sup>AP</sup> BD+C

STATE OF Florida  
COUNTY OF Leon



Sworn to and subscribed before me this 2<sup>nd</sup> day of July, 2014

Personally known

[Signature]  
NOTARY PUBLIC

OR Produced identification \_\_\_\_\_

Notary Public - State of Florida

\_\_\_\_\_  
(Type of identification)

My commission expires: December 4, 2015

Robbyn D. Whitlock  
Printed, typed, or stamped commissioned name of notary

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

**LEON COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

RFP Title: Request for Proposals for Architectural, Engineering, Interior Design, and Related Services, Continuing Supply  
 Proposal Number: BC-06-26-14-41  
 Opening Date: Thursday, June 26, 2014 at 2:00 PM

**LOCAL VENDOR CERTIFICATION**

The undersigned, as a duly authorized representative of the vendor listed herein, certifies to the best of his/her knowledge and belief, that the vendor meets the definition of a "Local Business." For purposes of this section, "local business" shall mean a business which:

- a) Has had a fixed office or distribution point located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six (6) months immediately prior to the issuance of the request for competitive bids or request for proposals by the County; and
- b) Holds any business license required by Leon County (or one of the other local counties), and, if applicable, the City of Tallahassee; and
- c) Is the principal offeror who is a single offeror; a business which is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.

Please complete the following in support of the self-certification and submit copies of your County and City business licenses. Failure to provide the information requested will result in denial of certification as a local business.

|   |  |
|---|--|
| Business Name:<br><b>Architects   Lewis + Whitlock</b>  |  |
| Current Local Address:<br><b>206 W. Virginia Street<br/>Tallahassee, Florida 32301</b>                      | Phone: <b>850.942.1718</b><br>Fax: <b>850.942.2110</b> |
| If the above address has been for less than six months, please provide the prior address.<br><br><b>N/A</b> |  |
| Length of time at this address:   |  |
| Home Office Address:<br><br><b>Same as Current Local Address</b>  | Phone:<br><br>Fax:                                     |

Signature of Authorized Representative

Date

STATE OF  
 COUNTY OF  
 OF

Florida  
Leon

The foregoing instrument was acknowledged before me this 2nd day of July, 2014

By C. Camden Whitlock, AIA, President of Architects | Lewis + Whitlock  
(Name of officer or agent, title of officer or agent) (Name of corporation acknowledging)

a Florida Corporation, on behalf of the corporation. He/she is personally known to me  
(State or place of incorporation)

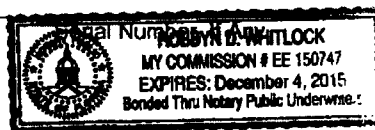
or has produced \_\_\_\_\_ as identification.

Return Completed form with supporting documents to:

Leon County Purchasing Division  
 1800-3 N. Blair Stone Road  
 Tallahassee, Florida 32308

Robbyn D. Whitlock  
 Signature of Notary  
 Print, Type or Stamp Name of Notary

Title or Rank



**Local Vendor | Supporting Documentation**

**STATE OF FLORIDA  
 DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
 BOARD OF ARCHITECTURE & INTERIOR DESIGN**

|                       |  |
|-----------------------|--|
| <b>LICENSE NUMBER</b> |  |
| AA0003318             |  |

The ARCHITECT CORPORATION  
 Named below IS CERTIFIED  
 Under the provisions of Chapter 481 FS.  
 Expiration date: FEB 28, 2015



ARCHITECTS: LEWIS + WHITLOCK, P.A.  
 206 W VIRGINIA STREET  
 TALLAHASSEE FL 32301



RICK SCOTT  
 GOVERNOR

ISSUED: 02/11/2013 SEQ # L1302110000622  
 DISPLAY AS REQUIRED BY LAW

KEN LAWSON  
 SECRETARY

|   |   |  |
|---|---|--|
| 2013-14   | <b>CITY OF TALLAHASSEE BUSINESS TAX CERTIFICATE</b>   | 2013-14                                  |
|   | <b>LOCAL BUSINESS TAX RECEIPT</b>   |  |
| <b>TAX CERTIFICATE EXPIRES SEPTEMBER 30, 2014</b> |   |  |
| <b>DBA:</b> ARCHITECTS: LEWIS & WHITLOCK, P.A.    | <b>Account Number:</b>  | 53144                                    |
| <b>Location:</b> 206 W VIRGINIA ST                |   |  |
| <b>Address:</b> TALLAHASSEE FL 32301              | <b>Type Code</b>  | <b>Sub Code</b> <b>Type Description:</b> |
|   | 650   | b Professional - Architect               |
| <b>ARCHITECTS: LEWIS &amp; WHITLOCK, P.A.</b>     | The firm, corporation, organization, business or individual whose name appears herein has paid a business tax for the business activities indicated above, subject to city, state and federal laws. This certificate must be conspicuously displayed at the location of the business activity. A change of location from the stated business location on this certificate as well as a change in ownership requires a transfer. (See reverse side.) |  |
| <b>RODNEY LEWIS</b>                               |   |  |

**REGISTRATION TO DO BUSINESS IN FLORIDA:**

Architects: Lewis + Whitlock is an S-Corporation incorporated in the State of Florida.  
#P00000001186

Architects: Lewis - Whitlock is an Architect Corporation licensed with the State of Florida Department of Business and Professional Regulation, Board of Architecture and Interior Design.  
#AA0003316

**FEDERAL TAX IDENTIFICATION NUMBER:**

59-3616761

*State of Florida  
Department of State*

I certify from the records of this office that ARCHITECTS: LEWIS + WHITLOCK, P.A. is a corporation organized under the laws of the State of Florida, filed on January 5, 2000.

The document number of this corporation is P00000001186.

I further certify that said corporation has paid all fees due this office through December 31, 2014, that its most recent annual report/uniform business report was filed on February 24, 2014, and its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-sixth day of March,  
2014*



*Ken Peterson*  
**Secretary of State**

Authentication ID: CU1945198341

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

<https://efile.sunbiz.org/certauthver.html>



# Leon County

## Board of County Commissioners

301 South Monroe Street, Tallahassee, Florida 32301  
(850) 606-5302 www.leoncountytfl.gov

Purchasing Division  
1800-3 Blair Stone Road  
(corner of Miccosukee and Blair Stone Roads)  
Tallahassee, Florida 32308  
(850) 606-1600

### Commissioners

BILL PROCTOR  
District 1

June 23, 2014

JANE G. SAULS  
District 2

RE: Bid Title: Request for Proposals for Architectural, Engineering,  
Interior Design, and Related Services, Continuing Supply

JOHN DAILEY  
District 3

Bid No: BC-06-26-14-41  
Opening Date: CHANGED to July 10, 2014

BRYAN DESLOGE  
District 4

### ADDENDUM #1

KRISTIN DOZIER  
District 5

Dear Vendor:

MARY ANN LINDLEY  
At-Large

This letter serves as Addendum #1 for the above referenced project.

NICK MADDOX  
At-Large

The following shall be added to the bid specifications:

**The opening date shall be changed to July 10, 2014.**

VINCENT S. LONG  
County Administrator

Acknowledgment of this addendum is required as part of your bid submittal. Failure to acknowledge this addendum may result in rejection of your bid.

HERBERT W.A. THIELE  
County Attorney

Should you have any questions, feel free to call me at (850) 606-1600.

Sincerely,

Don Tobin, CPPB  
Purchasing and Contract Administrator

DT

**EXHIBIT C – Page 1 of 1**

**HOURLY RATE SCHEDULE**

All proposals for specific work assignments under this contract shall be based upon the following hourly rates:

| <b>Work Category</b>       | <b>Billing Rate</b> |
|----------------------------|---------------------|
| Principal                  | \$174.00            |
| Project Manager            | \$125.00            |
| Senior Architect           | \$120.00            |
| Architect                  | \$105.00            |
| Interior Designer          | \$90.00             |
| Graduate Architect         | \$85.00             |
| CADD Operator              | \$65.00             |
| Clerical                   | \$48.40             |
| Construction Administrator | \$83.00             |
| Roofing Observer           | \$95.00             |
| Landscape Architect        | \$90.00             |
| Landscape Intern           | \$75.00             |
| Architect Intern           | \$75.00             |

1. The above hourly rates will be revisited on an annual basis, at the beginning of the County's fiscal year, and adjusted automatically to percent change in US Bureau of Labor Statistics CPI-U, base period September 2014. This adjustment will apply to new proposals only, not work currently underway. Before submitting a proposal after a new fiscal year, the consultant should check with the County for adjusted rates.
2. All proposals for specific work assignments shall be based on these rates plus reimbursable expenses but will become a lump sum agreement once a Purchase Order is issued. The Purchase Order constitutes approval and notice to proceed.
3. All reimbursable expenses necessary for proper and complete execution of the work including printing, copying and plan review fees shall be included in the proposal for a specific work assignment.
4. Except in extraordinary cases, travel expenses will not be reimbursed. If a particular work assignment requires out of town travel, the consultant should contact the County's project manager before including travel expenses in a proposal.
5. Work that is performed solely by a sub-consultant may be requested by the County. Mark-ups on this work shall be limited to 5%.

**LEON COUNTY  
CONTRACT ROUTING FORM**

Attachment E  
LOGGED IN Alle-0744  
LOGGED OUT

Original    
Renewal    
 Amendment( # )

County Contract No. 4108

Division Contact: Don Lanham Phone # 606-1600

Department/Division: Purchasing

Contractor: Architects Lewis + Whitlock

Address 206 W. Virginia St.

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

RECEIVED  
16 AUG 31 PM 2:24  
FINANCE DIVISION  
BOB INZER  
CLERK & COMPTROLLER

**Contract Period:** From 10/1/2014 To 9/30/2016

Renewal Periods: Number 3 Term 1 year

Contract Total \$ Amount: \_\_\_\_\_ or check if  Unit Price Agreement

|  |   |  |
|--|---|--|
| <b>Contract Type:</b>                          | <b>Procurement Method:</b>                      | <b>Forms Required:</b>                                     |
| <input type="checkbox"/> Conservation Easement | <input type="checkbox"/> Bid*                   | <input type="checkbox"/> Public Entity Crimes Statement    |
| <input type="checkbox"/> Construction          | <input type="checkbox"/> RFP*                   | <input type="checkbox"/> Performance Bond                  |
| <input type="checkbox"/> Continuing Supply     | <input type="checkbox"/> Sole Source            | <input type="checkbox"/> Materials & Payment Bond          |
| <input type="checkbox"/> Deed                  | <input type="checkbox"/> Gov't Entity           | <input type="checkbox"/> Warranty Bond                     |
| <input type="checkbox"/> Interlocal Agreement  | <input type="checkbox"/> Other (Explain Below)  | <input type="checkbox"/> Certification Regarding Debarment |
| <input type="checkbox"/> Grant                 |   |  |
| <input type="checkbox"/> Lease                 | <b>Insurance Certificates:</b>                  | *Bid/RFP # <u>BC-06-26-14-41</u>                           |
| <input type="checkbox"/> Other Services        | <input type="checkbox"/> General Liability      | <b>Awarded by:</b>   |
| <input type="checkbox"/> Performance Agreement | <input type="checkbox"/> Professional Liability | <input checked="" type="checkbox"/> Purchasing Director    |
| <input type="checkbox"/> Professional Services | <input type="checkbox"/> Workers' Compensation  | <input type="checkbox"/> County Administrator              |
| <input type="checkbox"/> Purchase              | <input type="checkbox"/> Errors & Omissions     | <input type="checkbox"/> Board of County Commissioners     |
| <input type="checkbox"/> Other (Explain below) | <input type="checkbox"/> Automobile Coverage    | Agenda Date _____ Item # _____                             |

RECEIVED  
16 SEP -6 AM 9:50  
FINANCE DIVISION  
BOB INZER  
CLERK & COMPTROLLER

Comments: Amendment required by the State concerning the application of Chapter 119, Florida Statutes.

**Routing:**

| Required                            | Initials   | Date           |  |
|-------------------------------------|------------|----------------|--|
| <input checked="" type="checkbox"/> | <u>Dal</u> | <u>8/22/16</u> | Originating Division <u>Purchasing</u>   |
| <input type="checkbox"/>            |            |                | Group Director                           |
| <input checked="" type="checkbox"/> | <u>SWK</u> | <u>8/30/16</u> | Purchasing                               |
| <input checked="" type="checkbox"/> | <u>hr</u>  | <u>8/31/16</u> | County Attorney's Office                 |
| <input type="checkbox"/>            |            |                | Deputy or Assistant County Administrator |
| <input type="checkbox"/>            |            |                | County Administrator                     |
| <input type="checkbox"/>            |            |                | Chairman, BCC                            |
| <input checked="" type="checkbox"/> | <u>DP</u>  | <u>8/31/16</u> | Clerk's Office (Finance)                 |

08/30/16 15:44:04  
Received by  
Leon County Attorney's Office

Return completed documents to: Don Lanham

**Be sure to return and file a fully executed agreement with the Finance Division**



**AMENDMENT TO AGREEMENT**

THIS AMENDMENT TO THE AGREEMENT dated October 23, 2014, is made as of the 12<sup>th</sup> day of August, 2016, by and between LEON COUNTY FLORIDA, a political subdivision of the State of Florida ("County") and ARCHITECTS LEWIS + WHITLOCK, hereinafter referred to as the "Contractor".

**RECITALS**

**WHEREAS**, the County and the Contractor entered into an Agreement dated October 23, 2014 (the "Agreement"); and

**WHEREAS**, the County desires to amend the Agreement to add to Terms and Conditions:

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

**LEON COUNTY PURCHASING DIVISION  
ATTN: SHELLY KELLEY, PURCHASING DIRECTOR  
1800-3 N. BLAIRSTONE ROAD  
TALLAHASSEE, FLORIDA 32308  
PHONE: 850-606-1600  
EMAIL: KELLEYS@LEONCOUNTYFL.GOV**

**NOW, THEREFORE**, for an in consideration of the mutual promises and covenants herein set forth, the Parties hereby agree as follows:

- I. Agreement to add the above statement to Terms and Conditions:
- II. All other terms and conditions of the aforesaid Agreement dated October 23, 2014, not inconsistent with the provisions hereof, shall remain in full force and effect.

**Remainder of page intentionally left blank**

AMMENDMENT TO THE AGREEMENT BETWEEN LEON COUNTY AND ARCHITECTS LEWIS + WHITLOCK, BC-06-18-15-41

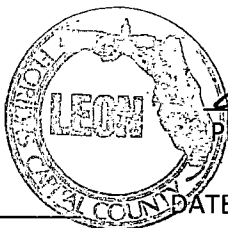
IN WITNESS WHEREOF, the parties hereto, through their duly authorized representative, have executed this Second Amendment as of the date first written above.

LEON COUNTY, FLORIDA

ARCHITECTS LEWIS + WHITLOCK

BY: Shelly Kelley  
Shelly W. Kelley  
Purchasing Director

BY: [Signature]  
President or Authorized Designee



Charles Camden Whitlock  
Printed Name

DATE: 8/30/16 DATE 8/19/16

ATTEST:  
Bob Inzer  
Leon County Clerk of the Circuit Court and Comptroller  
Leon County, Florida

BY: John Stott, Deputy Clerk

Approved as to Form:  
County Attorney's Office

BY: [Signature]  
Herbert W.A. Thiele, Esq.

Architects | Lewis + Whitlock

October 2, 2014

Mr. John Ward  
Project Manager  
Leon County Facilities Management  
1907 South Monroe Street  
Tallahassee, FL 32301

**RE: Architectural & Interior Design Services, Continuing Supply | RFP# BC-06-26-14-41**

Dear Mr. Ward:

Architects: Lewis + Whitlock, PA (AL+W) is honored to be selected to serve Leon County in the capacity of Continuing Supply Architectural & Interior Design Services.

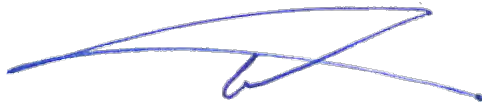
As requested, we are providing you with our current billable rate schedule. Each category listed below includes the maximum billable rate for services provided by AL+W, including overhead and profit multipliers.

|                     |       |
|---------------------|-------|
| Principal Architect | \$160 |
| Project Manager     | \$125 |
| Senior Architect    | \$125 |
| Architect           | \$95  |
| Interior Designer   | \$95  |
| Graduate Architect  | \$85  |
| CADD Operator       | \$70  |
| Clerical            | \$40  |

If you have any questions regarding the proposed rates listed above, please call.

Sincerely,

Architects | Lewis + Whitlock



C. Camden Whitlock, AIA, LEED<sup>AP BD+C</sup>  
Principal



# Senator Bill Montford – District 3

214 Senate Office Building  
404 South Monroe Street  
Tallahassee, Florida 32399-1100  
(850)-487-5003 or (850)-487-5086 FAX

## 2016-2017 Budget Request Form

***NOTE: If your organization submits more than one Budget Request Form, please rank your budget requests. Also, if additional space is needed to respond to a question, please feel free to attach additional pages***

**1. Project Title:** Entrepreneurial Excellence Program **Date:** January 10, 2017

**2. Project Description (include services to be provided):**

The Entrepreneurial Excellence Program (EEP) provides invaluable, intensive and comprehensive guidance and support to early stage startup businesses and entrepreneurs as they navigate through the vulnerable stages of business development.

**3. Requester: Name:** Ronald J. Miller, Jr., Executive Director

**Organization:** Leon County Research & Development Authority (LCRDA) / Innovation Park

**4. Recipient: Name:** LCRDA / Innovation Park **Street:** 1736 W Paul Dirac Dr

**City:** Tallahassee **Zip Code:** 32310

**County(s):** Leon

**Gov't Entity**  **Private Organization (Profit/Not for Profit)**

**5. Contact: Name:** Ronald J. Miller, Jr.

**Phone #:** 850-575-0343

**E-mail:** RMiller@inn-park.com

**6. What local/statewide interest does this project address?**

EEP serves the Big Bend region: Tallahassee/Leon County, and surrounding area, by providing a unique and proven set of entrepreneurial support services to individuals looking to start a new business, or to commercialize research, in the region.

**7. Measurable Outcome Anticipated (Please also include the metrics that will demonstrate the beneficial return on investment to Florida taxpayers):**

Metrics from graduate surveys demonstrate return on investment to date including 130 companies completing the course, 64% still in business today with a combined total of 177 current employees, and 25% still pursuing starting a business. Another 120 companies are expected to be served in the next five years. See attached for more details.

**8. Amount you are requesting from the State for this project this year:**

\$ 250,000 (5 years /\$50,000 p/yr)

**9. Total cost of project this year:**

\$ 50,000.00 \_\_\_\_\_

**10. What is this request being made to fund (check all that apply)?:**

Operations  Construction

**11. What type of match exists for this request (check all that apply)?**

Local  Private  Federal  None

**11a. Enter all amounts that apply:**

Total Cash Amount: \$ \_\_\_\_\_

Total In Kind Amount \$ \_\_\_\_\_

**12. Was this project previously funded by the State?**

Yes  No

**12a. If yes, what was the most recent Fiscal Year the project was funded by the State (eg. 2012-2013)?** \_\_\_\_\_

Amount: \$ \_\_\_\_\_

**13. Is future-year funding likely to be requested?**

Yes  No

**13a. If yes, how much?** \$ \_\_\_\_\_

**13b. What is the purpose for future year funding?:**

Recurring Operations  Non-Recurring Construction  Other \_\_\_\_\_

**14. Will this be an annual request?**

Yes  No

**15. Was this project included in an Agency Budget Request?**

Yes  No

**15a. If yes, which agency made the request?:**

\_\_\_\_\_

**16.** Is there documented need for this project?

Yes  No

**16a.** If yes, what is the documentation (eg: county/local government, Agency Needs Assessment, etc.)?

The Office of Economic Vitality, the Leon County Commission, and FSU (among many others) have documented the need for support of entrepreneurial activity in the Tallahassee/Leon County and Big Bend region.

**17.** Was this project request heard before a publicly-noticed meeting of a body of elected officials (municipal, county, or state)?

Yes  No

**17a.** If yes, what governmental entity heard the request?:

Leon County Research & Development Authority

**18. Is this a water project?**

Yes  No

**18a.** Are you requesting funding for a storm water, surface water restoration, or other water management project?

Yes  No

**18b.** If yes, in which water management district or districts is your project located?

**18c.** Does the project implement a plan developed pursuant to the Surface Water Improvement and Management Act created in Part IV of ch. 373, F.S., other water restoration plans required by law, or management plans prepared pursuant to s. 403.067, F.S.?

Yes  No

**18d.** Is the project under construction?

Yes  No

**18e.** Does the project protect public health or the environment?

Yes  No

**19. Are you requesting funding for a wastewater project?**

Yes  No

**19a.** If yes, does your project qualify for funding from DEP’s “Small Community Wastewater Treatment Grant Program” under s. 403.1838, F.S.?

Yes  No

**19b.** If yes, have you received or applied for funding?

Yes  No

**19c.** If yes, provide the DEP Disadvantaged Small Community Grant project number

---

**19d.** Have you received or applied for funding for this project from DEP’s State Revolving Fund (SRF) program under s. 403.1835, F.S.?

Yes  No

**19e.** If yes, provide the DEP SRF project:

---

**19f.** Is the project under construction?

Yes  No

**19g.** Have you provided at least a 50% match (that is, one-half the total project cost identified in this request)?

Yes  No

**19h.** If yes, identify the amount and source of the match:

Amount \$ \_\_\_\_\_

Source: \_\_\_\_\_

(Matching requirement may be waived for counties with a population of 75,000 or less and municipalities with a population of 25,000 or less. Match requirement waiver shall be approved on the basis of fiscal hardship or environmental need. The applicant must certify that the cost of the match is a fiscal hardship pursuant to s. 218.075, F.S.)

**20. Are you requesting funding for a drinking water project?**

Yes  No

**If yes, answer the following:**

**20a.** Have you received or applied for funding for this project from DEP's Drinking Water/Wastewater Treatment Facility Construction State Revolving Fund program/or Small Community Wastewater Treatment Grants Program?

Yes  No

**20b.** If yes, provide the DEP SRF project number:

\_\_\_\_\_

**20c.** Is the project under construction?

Yes  No

**20d.** Have you provided a match?

Yes  No

**20e.** If yes, please identify the amount and source of the match:

Amount \$ \_\_\_\_\_

Source: \_\_\_\_\_

- **If additional space is needed to respond to a question, please feel free to attach additional pages.**
- **Please mail, email or FAX your completed form by January 31, 2017 to:**

**SENATOR BILL MONTFORD**  
**ATTN: Melissa Durham**  
**214 Senate Office Building**  
**404 South Monroe Street**  
**Tallahassee, Florida 32399-1100**  
**PHONE: (850) 487-5003**  
**FAX: (850) 487-5086**  
**EMAIL: Durham.Melissa@flsenate.gov**



BUDGET REQUEST FORM ATTACHMENT  
**Project Title: Entrepreneurial Excellence Program**

**4. Recipient**

The **Leon County Research and Development Authority (LCRDA)** is a dependent special district of Leon County authorized by Florida Statute Chapter 159 Part V. Its mission is to work in affiliation with Florida State University (FSU), Florida A&M University (FAMU) and Tallahassee Community College (TCC), along with the City of Tallahassee, Leon County, and private sector leaders to promote our region's research and development assets, and to foster the attraction, startup and growth of private innovative companies that create high wage jobs in Leon County. LCRDA oversees the management of **Innovation Park of Tallahassee**. LCRDA currently receives no taxpayer funds. All funding is received from leasing activities related to the 5 buildings it owns in Innovation Park. Its operating budget is insufficient to fund the proposed project.

Innovation Park is located on 200 acres in southwest Leon County. Because of its powerful and unique relationships with FSU and FAMU, it is a hub for economic development, scientific research, and commercialization activities. It is a world-class destination where academic research and development can be transformed into innovative new business enterprises, and where innovative individuals and organizations can share their technical knowledge and promote economic development. Innovation Park holds a distinctive and important space in the regional economic ecosystem, and connects commercialization and outside investment with innovation and entrepreneurship. Its success is dependent on the continued growth and nurturing of entrepreneurs in the region.

**6. Local/Statewide Project Interest Project Addresses**

Following the downturn in the economy 10 years ago, the need for economic diversification of the Big Bend regional economy became apparent. Fostering entrepreneurship became a key strategy to address this need in the region. The **Entrepreneurial Excellence Program (EEP)** was launched by the Tallahassee/Leon County Economic Development Council (EDC) in 2011. The EEP has been a key entry point into the entrepreneurial ecosystem for the region since its beginning by providing invaluable guidance, training, and resources to over 130 companies. The EEP was initially funded by a grant from the Small Business Administration for the first four years, and then by a grant from the Knight Foundation for the next two years. The LCRDA assumed management of the EEP in 2016 following the closing of the EDC.

The EEP has been instrumental in the dramatic increase in entrepreneurial activity in the Big Bend region in the past five years. This increased activity is widespread - impacting the universities, local government, and private sector economy, as well as influencing the formation of several incubator facilities and a highly-focused effort to increase the level of entrepreneurial support and success, which results in business formation, technology commercialization, job creation, and talent retention. The continuation of the EEP is essential to the continued growth of entrepreneurship in the region.

**BUDGET REQUEST FORM ATTACHMENT**  
**Project Title: Entrepreneurial Excellence Program**

**Project Details**

- Two 10-class EEP sessions are held per calendar year (Spring and Fall)
- Each session (5:30 – 9:00pm) provides ten unique, highly interactive learning experiences
- EEP enrolls 12 companies (up to two individuals each) per session
- Classes are currently held at the TCC Advanced Manufacturing Training Center
- Prominent community business leaders and experts volunteer to present at each session on a variety of pertinent topics, including:
  - Effective Business Models
  - Presentation Skills
  - Team Development
  - Legal Foundations
  - Marketing Strategies
  - Sales
  - Funding Insight
  - Entrepreneurial Experiences
  - Local Entrepreneurial Support
- Each session provides an intense one-on-one mentoring environment
- These same business leaders continue as resources and mentors for the EEP class participants after the classes are completed
- EEP class graduates maintain their relationships with one another long after the program completion
- Year-round program costs include contracted program director fees, direct class costs, LCRDA personnel support, general program overhead, promotion and marketing, plus on-going involvement in the local entrepreneurial ecosystem
- Each company attending pays a \$400 fee
- Scholarships/fee waivers are offered to nonprofits and demonstrated need applicants

**7. Measurable Outcomes**

Since 2011, over 130 companies have been served. A 2015 survey of EEP graduates, with 81 companies responding, showed 64% in business in Tallahassee today with another 25% still pursuing starting their business. These graduate companies have a combined total of 177 current employees. Respondents project that in 3 years they will account for a combined total of 577 jobs in Tallahassee: a 311% increase. Based on these results, in the future this program expects to annually serve 24 companies with 3-year employment levels of 157 people. This totals 785 employees over the 5-year request. What can't be measured is the invaluable impact on the participants who, upon receiving the education and feedback offered by the program, decide not to pursue their venture. These participants have been saved the loss of time and money trying to pursue an ill-advised venture, or who aren't a good match for the rigors of entrepreneurship.

BUDGET REQUEST FORM ATTACHMENT  
**Project Title: Entrepreneurial Excellence Program**

**Testimonials**

*“For four weeks, I was surrounded by people who sincerely wanted me to succeed, who helped prepare me to do that, and who will continue making themselves available to me. I received the resources I needed when I needed them.” – Judd Butler, PortStar*

*“The course provided a new framework for how I view my business. It’s exciting to have a good idea, and the course provided encouragement while at the same time providing realistic ways to gauge whether my business plan was moving in the right direction.” – Greg Frost, Gulf Coast Tung Oil*

*“From beginning to end I gained valuable information that will certainly improve how I proceed with my PointCatcher concept. It is especially touching that people as accomplished as the teachers, who are surely very busy in their own right, made the time to share their valuable insight. By coming in to the class without an extensive background in business, the ability to gain so much information in a short amount of time was transforming.” — Barbara Wescott, Swellcoin*

*“I never realized the wealth of resources available in Tallahassee for ‘budding’ entrepreneurs until I took this class. Actually, I was beginning to think I had made a mistake in moving to Tallahassee as far as hopes for a successful business venture location. Thanks to EEP, I now believe there is a rainbow in the sky.” –Dr. Michelle Gamble, Sankofa Healing and Enrichment, Inc.*

**8. Funding Request**

\$50,000 per year / 5 years (\$250,000 total)

**Leon County Research and Development Authority  
Executive Director's Report to the Board of Governors  
February 2, 2017**

**Strategic Issues:**

- Jump Start:
  - Hosted EDA representative from Atlanta to tour proposed JumpStart facility and, along with Kristin Dozier, provided briefing about Innovation Park
  - Held committee meeting to discuss survey results, shared equipment needs, shared university resources, facility space plan concept, and architectural and engineering study requirements
  - Held committee meeting to discuss key partners, and sales and marketing
  - Worked with Mary Jo Spector to obtain a proposal from Lewis + Whitlock to conduct and architectural and engineering study
  - Worked with General Counsel to develop contract to piggy-back on county contracts for architectural and engineering needs
  - Worked with staff to summarize and present results of client prospect/stakeholder survey
  - Met with EEP graduate interested in starting a business incubator
- Office of Economic Vitality:
  - Met with Al Latimer to discuss LCRDA role with OEV committees
  - Met with Ben Pingree to discuss lease prospect
  - With Chair Longman, met with several (6) commissioners/IA members, County Administrator and Assistant County Administrator to discuss Innovation Park
- Entrepreneurial Excellence Program:
  - Worked with Larry Lynch, staff, board members, and House and Senate legislative aides on legislative funding request
  - Attended County Community Legislative Dialogue Session (2/1)
- Tech Grant: Provided support to DPC in planning this year's program, and beginning implementation
- Other:
  - Met with Leon County Commissioner Jimbo Jackson to provide detailed Innovation Park orientation
  - Worked with Talcor to review entrance monument signage maintenance/update proposals

**Tenant/Prospective Tenant Relations:**

- Worked with FSU to extend one year the ISPA lease in Morgan Building under same terms and conditions
- Continue to follow up with Morgan prospect—waiting on decision from FAMU president
- Continue to follow up with National Park Service regarding expansion—budget approval resubmitted due to administration changes and length of time to complete; also, NPS completed its basic design document requirements required by GSA

**Financial Oversight:**

- Investigated CD rates and monitored timing for reallocation from FLPRIME to SPIA
- Started Audit RFP—investigated and found County RFP to use as a model
- Continued to work with Talcor on obtaining HVAC preventative maintenance quotes
- Filed annual property tax exemption cards
- Reviewed Simplex Grinnell contract with Talcor

**Community Involvement & Economic Development Events:**

- Attended Tallahassee Innovation Partnership Pitch Night
- Met with community business leader to provide information about Innovation Park
- Assisted FRPN President with planning annual meeting in Orlando
- Provided information for Innovation Park update presented to KCCI

Leon County Research and Development Authority  
Executive Director's Report to the Board of Governors  
February 2, 2017

**General:**

- Conducted 6-month staff evaluation for Director of Programs & Communications
- Continued to follow up with Counsel regarding Bing Energy bankruptcy and move-out
- Modified Investment Policy to incorporate and eliminate duplication of Investment Advisory Committee Charter language
- Trained staff on annual financial disclosure system requirements
- Worked with Property Appraiser's office to correct tax rolls related to Innovation Park
- Vacation!

**Committee/Other Meetings:**

- Jump Start Committee (2)
- Florida Angel Nexus
- Junior Achievement Board of Directors (2)
- AERO meeting
- Monthly OEV meeting
- Bi-monthly Florida Research Park Network call

**Current Projects/Activities**

*(Not all inclusive)*

- Entrepreneurial Excellence Program legislative funding follow up
- JumpStart Architectural & Engineering Study
- JumpStart financial model and draft business plan
- Finalize Audit
- Draft Auditor RFP
- Executive, and Audit committee meetings
- TechGrant program support/orientation meeting/review applications
- TechTopics event support
- Trail planning and implementation
- Provide detail orientation for Commissioner Lindley
- Attend EEP Alum/Tech Grant winners event
- Attend EEP opening night
- Attend Intergovernmental Agency Meeting
- Attend Discovery on Parade Event
- Attend Mag Lab open house
- Attend FRPN annual meeting
- Attend AERO meeting
- Attend JA Community Entrepreneurship Committee meeting
- Attend Hancock Bank speaker event
- Morgan Prospect follow up
- Work with GSA on National Park Service Johnson building expansion plans
- Administrative Coordinator's records retention project support
- Attend my son's wedding!

Respectfully submitted,  
Ronald J. Miller, Jr., Executive Director

## Director of Programs and Communications Report- February 2017

### Discovery on Parade

- Will have a booth at the event
- Created new display graphics to give our booth an updated look
- Create printed marketing materials to hand out

### EEP

- Class 13 has 7 sign-ups so far
- Larry and I have worked together to create survey for past recipients. The survey was sent first of January
- Scheduled EEP Alumni Night/TechGrant winner's circle event for 2/28. OEV anticipated to speak and motivational speaker Steve Rogers. Event taking place in CAPS seminar room

### March TechTopics

- Scheduled for March 8<sup>th</sup> at CAPS Seminar Room
- In the process of solidifying speakers for event

### TechGrant

- Important dates and deadlines have been announced
  - **January 9, 2017:** Application becomes available- 2017 TechGrant Application Packet
  - **February 13, 2017:** TechGrant Application Orientation, 4 p.m., Knight Administrative Centre, 1736 W. Paul Dirac Drive
  - **March 13, 2017:** Applications due (Note: only complete applications will be considered. Application must include: Application Form, Company Profile, signed Applicant Agreement, Business and Commercialization Plan and, if appropriate, Prior Grant Recipient Form.)
  - **April 12, 2017:** Finalists announced
  - **May 17, 2017\*:** Elevator Pitch Night Event, 5:30 –7:30 p.m.
- Put deposit on Venue- Goodwood Museum Carriage House
- Press Release announcing the program is open was sent out and picked up by Tallahassee Democrat and TalChamber
- Working with local A/V company to work with for the event
- In process of choosing judges
- In process of starting to ask for sponsorships

### Florida Trend Ad

- Featured in January article on page 113

### Website

- Created a page for Jumpstart
- Re-organized parts of the website
  - Created new News section which included news from Park organizations, Innovation Park Press Releases and a section for the monthly newsletter
  - Updated regional data from information on county and OEV websites
  - Included link to LCRDA under About
  - Changed homepage to include buttons that link to Jumpstart, News, Newsletter and University Park news
  - Updated sliders
  - Implemented an initial SEO strategy using current copy on pages

### Marketing Materials

- Drone footage was shot on 1/30 with Gerald Tookes

### Tallahassee Science Festival

- We are assisting with the Festival
- Our role: to work with the MagLab on marketing, maintaining the website and social media

**Other**

- Newsletter for December and January were both created, sent out and posted onto our website
- Social Media calendars were created and implemented
- Received word back from Knight Foundation. None of our ideas were selected this time
- Welcome Sign was created for Knight Administrative Centre

LEON COUNTY RESEARCH & DEVELOPMENT AUTHORITY  
PROPERTY MANAGEMENT REPORT  
DECEMBER - JANUARY  
BY: Mark Frost  
NAI TALCOR

EXECUTIVE SUMMARY..... 1  
KNIGHT ADMINISTRATIVE CENTER..... 2  
PHIPPS BUILDING ..... 2  
COLLINS BUILDING ..... 2  
MORGAN BUILDING ..... 3  
JOHNSON BUILDING..... 3

**EXECUTIVE SUMMARY**

As of mid January, 68% of 2015-2016 Common Area Expenses billed to tenants in common had been collected. The remaining 32% is primarily affiliated with Florida State University and their various parcels. I have been in communications with the responsible parties with FSU and clarified a few questions they had specific to acreage calculations. I would anticipate receipt of payment before the end of January, conformation of approval at a minimum.

The buildings will be ready for an exterior wash in May as budgeted. All indications are that separating the water utility to the three individual buildings within the Don Fuqua Research Complex is possible; the cost however may be prohibitive at the current time. We will continue to explore options as it is not an immediate requirement.



**KNIGHT ADMINISTRATIVE CENTER**

**Property Maintenance:**

There were no significant property maintenance issues addressed.

**Property Management:**

No significant issues to report for the time period.

**Receivables:** All tenants within policy.

|                          |                    |               |                |
|--------------------------|--------------------|---------------|----------------|
| <b>Occupancy Report:</b> | <u>Leasable SF</u> | <u>Vacant</u> | <u>%Vacant</u> |
|                          | 2,800              | 448           | 16%            |

**PHIPPS BUILDING**

**Property Maintenance:**

There were no major property maintenance items to report for the period.

**Property Management:**

There are no property Maintenance issues to report.

**Receivables:** Tenant is current

|                         |                    |               |                |
|-------------------------|--------------------|---------------|----------------|
| <b>Occupancy Report</b> | <u>Leasable SF</u> | <u>Vacant</u> | <u>%Vacant</u> |
|                         | 14,661             | 0             | 0 %            |

**COLLINS BUILDING**

**Property Maintenance:**

AC/Heat units reduced to minimal usage without compromising conditions.

**Property Management:**

Continue to monitor the move out process of BING equipment.

**Receivables:**

|                         |                    |               |                |
|-------------------------|--------------------|---------------|----------------|
| <b>Occupancy Report</b> | <u>Leasable SF</u> | <u>Vacant</u> | <u>%Vacant</u> |
|                         | 24,900             | 22,974        | 92.2%          |

**MORGAN BUILDING**

**Property Maintenance:**

All lighting issues have been identified and resolved.

**Property Management:**

There are no significant Property Management issues to report.

**Receivables:** All tenants are within policy

|                          |                    |               |                |
|--------------------------|--------------------|---------------|----------------|
| <b>Occupancy Report:</b> | <u>Leasable SF</u> | <u>Vacant</u> | <u>%Vacant</u> |
|                          | 22,587             | 11,587        | 51%            |

**JOHNSON BUILDING**

**Property Maintenance:**

In review of the SEAC Lease a few interior maintenance items were identified that called for bi annual or annual services; we are working towards acquiring quotations for services.

**Property Management:**

There are no property management issues to report.

**Receivables:** Tenant is current

|                         |                    |               |                |
|-------------------------|--------------------|---------------|----------------|
| <b>Occupancy Report</b> | <u>Leasable SF</u> | <u>Vacant</u> | <u>%Vacant</u> |
|                         | 39,337             | 13,668        | 42 %           |