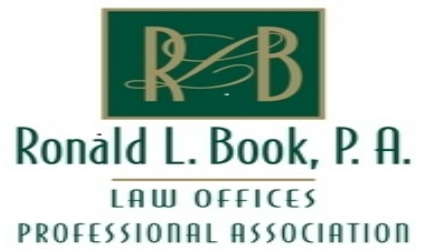




Nelson Diaz, Managing Partner  
9155 S Dadeland Blvd., Suite 1604  
Miami, FL 33156  
diaz@thesouthern.com  
305-421-6304



Ronald L. Book, P.A., President & CEO  
18851 N.E. 29th Ave., Suite 1010  
Aventura, FL 33180  
ron@rlbookpa.com  
305-935-1866

# CITY OF CORAL GABLES

RFP No. 2022-014  
Legislative Consulting Services  
August 1, 2022



SECTION I: REQUIRED FORMS  
AND MINIMUM QUALIFICATION  
REQUIREMENTS

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## CITY OF CORAL GABLES, FL

2800 SW 72<sup>nd</sup> Avenue, Miami, FL 33155  
 Finance Department / Procurement Division  
 Tel: 305-460-5102 / Fax: 305-261-1601

### REVISED PROPOSER'S ACKNOWLEDGEMENT

<p><b>RFP Title:</b> Legislative Consulting Services</p> <hr/> <p><b>RFP No.:</b> 2022-014</p> <p>A cone of silence is in effect with respect to this RFP. The Cone of Silence prohibits certain communication between potential vendors and the city. For further information, please refer to the City Code Section 2-1027 of the City of Coral Gables Procurement Code.</p>	<p><b>Electronic submittals must be received prior to 2:00 p.m., August 1, 2022, via PublicPurchase; and will remain valid for 120 calendar days. Submittals received after the specified date and time will not be accepted.</b></p> <p>Contact: Yusbel Gonzalez              Title: Procurement Specialist              Telephone:305-460-5107              Email: <a href="mailto:ygonzalez@coralgables.com">ygonzalez@coralgables.com</a>  <a href="mailto:contracts@coralgables.com">contracts@coralgables.com</a></p>
--	---

<p>Proposer Name: The Southern Group of Florida, Inc.</p>	<p>FEIN or SS Number: 59-3584976</p>
<p>Complete Mailing Address: P.O. Box 10570 Tallahassee, FL 32301</p>	<p>Telephone No.: <small>(850) 671-4401</small></p> <p>Cellular No.: <small>(305) 490-3414</small></p>
<p>Indicate type of organization below: Corporation: <input checked="" type="checkbox"/> Partnership: <input type="checkbox"/> Individual: <input type="checkbox"/> Other: <input type="checkbox"/></p>	<p>Fax No.: <small>(850) 671-4402</small></p>
<p>Bid Bond/Security Bond (Not applicable)</p>	<p>Email: <a href="mailto:diaz@thesouthernngroup.com">diaz@thesouthernngroup.com</a></p>

**ATTENTION: THIS FORM ALONG WITH ALL REQUIRED RFP FORMS MUST BE COMPLETED, SIGNED (PREFERABLY IN BLUE INK), AND SUBMITTED WITH THE RESPONSE PRIOR TO THE SUBMITTAL DEADLINE. FAILURE TO DO SO MAY DEEM PROPOSER NON-RESPONSIVE.**

THE PROPOSER CERTIFIES THAT THIS SUBMITTAL IS BASED UPON ALL CONDITIONS AS LISTED IN THE RFP DOCUMENTS AND THAT THE PROPOSER HAS MADE NO CHANGES IN THE RFP DOCUMENT AS RECEIVED. THE PROPOSER FURTHER AGREES IF THE RFP IS ACCEPTED, THE PROPOSER WILL EXECUTE AN APPROPRIATE AGREEMENT FOR THE PURPOSE OF ESTABLISHING A FORMAL CONTRACTUAL RELATIONSHIP BETWEEN THE PROPOSER AND THE CITY OF CORAL GABLES FOR THE PERFORMANCE OF ALL REQUIREMENTS TO WHICH THIS RFP PERTAINS. FURTHER, BY SIGNING BELOW PREFERABLY IN **BLUE INK**, ALL RFP PAGES ARE ACKNOWLEDGED AND ACCEPTED AS WELL AS ANY SPECIAL INSTRUCTION SHEET(S) IF APPLICABLE. THE UNDERSIGNED HEREBY DECLARES (OR CERTIFIES) ACKNOWLEDGEMENT OF THESE REQUIREMENTS AND THAT HE/SHE IS AUTHORIZED TO BIND PERFORMANCE OF THIS RFP FOR THE ABOVE PROPOSER.

  
 \_\_\_\_\_  
 Authorized Name and Signature

Managing Partner  
 \_\_\_\_\_  
 Title

7/27/2022  
 \_\_\_\_\_  
 Date

# **SOLICITATION SUBMISSION CHECKLIST**

## **Request for Proposals (RFP) No. 2022-014**

COMPANY NAME: (Please Print): The Southern Group Florida, Inc.  
Phone: (850) 671-4401 Email: diaz@thesoutherngroup.com

**A response package numbered by page must be submitted ELECTRONICALLY via PUBLICPURCHASE. Please provide the PAGE NUMBER(S) of your solicitation response in the blanks provided as to where compliance information is located in your Submittal for each of the required submittal items listed below:**

### **SUBMITTAL - SECTION I: TITLE PAGE, TABLE OF CONTENTS, REQUIRED FORMS, AND MINIMUM QUALIFICATION REQUIREMENTS.**

- 1) Title Page: Show the RFP number and title, the name of your firm, address, telephone number, name of contact person, e-mail address, and date. **PAGE(S) #** 1
- 2) Provide a Table of Contents in accordance with and in the same order as the respective "Sections" listed below. Clearly identify the material by section and page number. **PAGE(S) #** 2
- 3) Fill out, sign, and submit the Proposer's Acknowledgement Form. **PAGE(S) #** 3
- 4) Fill out and submit the Solicitation Submission Check List. **PAGE(S) #** 4-5
- 5) Fill out, sign, notarize (as applicable), and submit the Proposer's Affidavit and Schedules A through H. **PAGE(S)#** 6-13
- 6) Fill out, E-Verify Affidavit **PAGE(S)#** 14
- 7) Minimum Qualification Requirements: submit detailed verifiable information affirmatively documenting compliance with the Minimum Qualifications Requirements shown in Section 3. **PAGE(S) #** 15
- 8) Fill out, Lobbyist Registration & Oral Presentation Forms **PAGE #** 16-19

### **SUBMITTAL - SECTION II: EXPERIENCE AND PROPOSER'S QUALIFICATIONS**

#### **(i) FOR PROPOSER:**

- 1) Provide a complete history and description of your company, including, but not limited to, the number of years in business, size, number of employees, office location, copy of applicable licenses/certifications, credentials, capabilities and capacity to meet the City's needs. **PAGE(S) #** 22, 31-34
- 2) Describe the Proposer's relevant knowledge and experience in providing the services described in the "Scope of Services" to public sector agencies similar in size to the City of Coral Gables. **PAGE(S) #** 23

**(ii) FOR KEY PERSONNEL:**

- 1) Provide a summary of the qualifications, copy of applicable licenses/certifications, and experience of all proposed key personnel. Include detailed resumes (listing experience, education, licenses/certifications) for your proposed key personnel and specify the role and responsibilities of each team member in providing the services outlined in the RFP. Provide an organizational chart of all key personnel that will be used. For each key team member, please describe the experience in providing the services solicited herein.

**PAGE(S) #** 24-34

**SUBMITTAL - SECTION III: PROJECT APPROACH AND METHODOLOGY**

- 1) Describe in detail, your understanding, approach and methodology to perform the services solicited herein. Include detailed information, as applicable, which addresses, but need not be limited to: understanding of the RFP scope and requirements, implementation plan, strategies for assuring assigned work is completed on time and communication with City staff. Indicate how the Proposer intends to positively and innovatively work with the City in providing the services outlined in this RFP.

**PAGE(S) #** 36-40

- 2) Provide a detailed description of the capabilities and competency regarding:

- a. How the Legislative Advocacy Services will be addressed.

**PAGE(S) #** 37,38

- b. How the Organizational Implementation Services will be addressed.

**PAGE(S) #** 36,37

- c. How the Work Product requirements will be addressed.

**PAGE(S) #** 39,40

- d. How you can satisfy the Performance requirements.

**PAGE(S) #** 36-40

**SUBMITTAL – SECTION IV: PAST PERFORMANCE AND REFERENCES**

- 1) Provide a minimum of three (3) references from public sector agencies, particularly municipal/local government, for which Proposer has performed similar scope of services in the past five (5) years. Please include: (1) client name, (2) address, (3) contact name, (4) contact telephone number, (5) contact email address, (6) term of contract (start and end date), (7) contract amount, (8) services provided. **DO NOT include work/services performed for the City of Coral Gables or City employees as reference.**

**PAGE(S) #** 42-43

- 2) Provide a list with contact information of public sector clients, if any, that have discontinued use of Proposer's services within the past two (2) years and indicate the reasons for the same. The City reserves the right to contact any reference as part of the evaluation process.

**PAGE(S) #** 44

- 3) Please identify each incident within the last five (5) years where (a) a civil, criminal, administrative, other similar proceeding was filed or is pending, if such proceeding arises from or is a dispute concerning the Proposer's rights, remedies or duties under a contract for the same or similar type services to be provided under this RFP (*See Affidavit D*).

**PAGE(S) #** 44

**SUBMITTAL – SECTION V: PROPOSAL PRICE PROPOSAL**

- 1) Provide pricing on the Proposal Pricing Form

**PAGE(S) #** 46

**SUBMITTAL – SECTION VI: AGREEMENT COMMENTS/EXCEPTIONS**

- 1) Please follow the instructions as outlined in Section 1.6 Agreement Execution. The acceptance of or any exceptions taken to the terms and conditions of the City's Agreement shall be considered a part of a Proposer's submittal and will be considered by the Evaluation Committee.

**PROPOSER'S AFFIDAVIT**

**SOLICITATION:** RFP 2022-014 Legislative Consulting Services

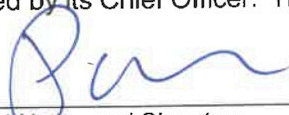
**SUBMITTED TO:** City of Coral Gables  
Procurement Division  
2800 SW 72 Avenue  
Miami, Florida 33155

The undersigned acknowledges and understands the information contained in response to this solicitation and the referenced Schedules A through H shall be relied upon by Owner awarding the contract and such information is warranted by the Proposer to be true and correct. The discovery of any omission or misstatements that materially affects the Proposer's ability to perform under the contract shall be cause for the City to reject the solicitation submittal, and if necessary, terminate the award and/or contract. I further certify that the undersigned name(s) and official signatures of those persons are authorized as (*Owner, Partner, Officer, Representative or Agent of the Proposer that has submitted the attached Response*). Schedules A through H are subject to Local, State and Federal laws (as applicable); both criminal and civil.

- SCHEDULE A – STATEMENT OF CERTIFICATION
- SCHEDULE B – NON-COLLUSION AND CONTINGENT FEE AFFIDAVIT
- SCHEDULE C – DRUG-FREE STATEMENT
- SCHEDULE D – PROPOSER'S QUALIFICATION STATEMENT
- SCHEDULE E – CODE OF ETHICS, CONFLICT OF INTEREST, AND CODE OF SILENCE
- SCHEDULE F – AMERICANS WITH DISABILITIES ACT (ADA)
- SCHEDULE G – PUBLIC ENTITY CRIMES
- SCHEDULE H – ACKNOWLEDGEMENT OF ADDENDA

This affidavit is to be furnished to the City of Coral Gables with its RFP response. It is to be filled in, executed by the Proposer and notarized. If the response is made by a Corporation, then it should be executed by its Chief Officer. This document **MUST** be submitted with the response.

Paul Bradshaw



*Authorized Name and Signature*

Partner

*Title*

07/20/2022

*Date*

STATE OF Florida

COUNTY OF Leon

On this 20 day of JULY, 2022, before me the undersigned Notary Public of

the State of FL, personally appeared Paul Bradshaw  
(Name(s) of individual(s) who appeared before Notary

And whose name(s) is/are subscribes to within the instrument(s), and acknowledges it's  
execution.

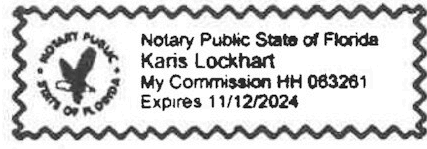
Karis Lockhart  
NOTARY PUBLIC, STATE OF FL

KARIS LOCKHART  
(Name of notary Public; Print, Stamp or  
Type as Commissioned.)

NOTARY PUBLIC  
SEAL OF OFFICE:

Personally know to me, or Produced  
Identification:

personally known  
(Type of Identification Produced)





**SCHEDULE "A" - CITY OF CORAL GABLES – STATEMENT OF CERTIFICATION**

Neither I, nor the firm, hereby represented has:

- a. employed or retained for a commission, percentage brokerage, contingent fee, or other consideration, any firm or person (other than a bona fide employee working solely for me or the Proposer) to solicit or secure this contract.
- b. agreed, as an express or implied condition for obtaining this contract, to employ or retain the services of any firm or person in connection with carrying out the contract, or
- c. paid, or agreed to pay, to any firm, organization or person (other than a bona fide employee working solely for me or the Proposer) any fee, contribution, donation or consideration of any kind for, or in connection with, procuring or carrying out the contract except as here expressly stated (if any):

**SCHEDULE "B" - CITY OF CORAL GABLES - NON-COLLUSION AND CONTINGENT FEE AFFIDAVIT**

1. He/she is the Owner and Partner in The Southern Group of Florida, Inc.  
(Owner, Partner, Officer, Representative or Agent)

of the Proposer that has submitted the attached response.

2. He/she is fully informed with respect to the preparation and contents of the attached response and of all pertinent circumstances respecting such response;
3. Said response is made without any connection or common interest in the profits with any other persons making any response to this solicitation. Said response is on our part in all respects fair and without collusion or fraud. No head of any department, any employee or any officer of the City of Coral Gables is directly or indirectly interested therein. If any relatives of Proposer's officers or employees are employed by the City, indicate name and relationship below.

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

4. No lobbyist or other Proposer is to be paid on a contingent or percentage fee basis in connection with the award of this Contract.

## **SCHEDULE "C" CITY OF CORAL GABLES – VENDOR DRUG-FREE STATEMENT**

Preference may be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

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

The company submitting this solicitation has established a Drug Free work place program in accordance with State Statute 287.087

**SCHEDULE "D" CITY OF CORAL GABLES – PROPOSER'S QUALIFICATION STATEMENT**

The undersigned declares the truth and correctness of all statements and all answers to questions made hereinafter:

**GENERAL COMPANY INFORMATION:**

Company Name: The Southern Group of Florida, Inc.

Address: 123 S. Adams St Tallahassee FL 32301  
Street City State Zip Code

Telephone No: (850) 671-4401 Fax No: (850) 671-4402 Email: diaz@thesoutherngroup.com

How many years has your company been in business under its present name? 4 Years

If Proposer is operating under Fictitious Name, submit evidence of compliance with Florida Fictitious Name Statue:

Under what former names has your company operated? : Southern Strategy Group

At what address was that company located? 123 S. Adams St., Tallahassee, FL 32301

Is your Company Certified? Yes x No If Yes, **ATTACH COPY** of Certification.

Is your Company Licensed? Yes \_\_\_\_\_ No x If Yes, **ATTACH COPY** of License

Has your company or its senior officers ever declared bankruptcy?

Yes \_\_\_\_\_ No x If yes, explain: \_\_\_\_\_

**LEGAL INFORMATION:**

Please identify each incident **within the last five (5) years** where a civil, criminal, administrative, other similar proceeding was filed or is pending, if such proceeding arises from or is a dispute concerning the Proposer's rights, remedies or duties under a contract for the same or similar type services to be provided under this RFQ **(A response is required. If applicable please indicate "none" or list specific information related to this question. Please be mindful that responses provided for this question will be independently verified):**

none.

Has your company ever been debarred or suspended from doing business with any government entity?

Yes \_\_\_\_\_ No x If Yes, explain \_\_\_\_\_

**SCHEDULE "E" CITY OF CORAL GABLES – CODE OF ETHICS, CONFLICT OF INTEREST, AND  
CONE OF SILENCE**

THESE SECTIONS OF THE CITY CODE CAN BE FOUND ON THE CITY'S WEBSITE, UNDER GOVERNMENT, CITY DEPARTMENT, PROCUREMENT, PROCUREMENT CODE (CITY CODE CHAPTER 2 ARTICLE VIII); SEC 2-1023; SEC 2-606; AND SEC 2-1027, RESPECTIVELY.

IT IS HEREBY ACKNOWLEDGED THAT THE ABOVE NOTED SECTIONS OF THE CITY OF CORAL GABLES CITY CODE ARE TO BE ADHERED TO PURSUANT TO THIS SOLICITATION.

**SCHEDULE "F" CITY OF CORAL GABLES - AMERICANS WITH DISABILITIES ACT (ADA)  
DISABILITY NONDISCRIMINATION STATEMENT**

I understand that the above named firm, corporation or organization is in compliance with and agreed to continue to comply with, and assure that any sub-contractor, or third party contractor under this project complies with all applicable requirements of the laws listed below including, but not limited to, those provisions pertaining to employment, provision of programs and service, transportation, communications, access to facilities, renovations, and new construction.

The American with Disabilities Act of 1990 (ADA), Pub. L. 101-336, 104 Stat 327, 42 U.S.C. 12101,12213 and 47 U.S.C. Sections 225 and 661 including Title I, Employment; Title 11, Public Services; Title III, Public Accommodations and Services Operated by Private Entities; Title IV, Telecommunications; and Title V, Miscellaneous Provisions.

The Florida Americans with Disabilities Accessibility Implementation Act of 1993, Sections 5553.501-553.513, Florida Statutes

The Rehabilitation Act of 1973, 229 U.S.C. Section 794

The Federal Transit Act, as amended, 49 U.S.C. Section 1612

The Fair Housing Act as amended, 42 U.S.C. Section 3601-3631

**SCHEDULE "G" CITY OF CORAL GABLES - STATEMENT PURSUANT TO SECTION 287.133 (3) (a),  
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES**

1. I understand that a "public entity crime" as define in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any Proposal or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
2. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

3. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:

1. A predecessor or successor of a person convicted of a public entity crime; or 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

4. I understand that a "person" as defined in Paragraph 287.133(1)(e), **Florida Statutes**, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which Proposals or applies to Proposal on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

5. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **[Must indicate which statement below applies.]**

Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list.

**[Attach a copy of the final order]**

**I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.**

**SCHEDULE "H" CITY OF CORAL GABLES - ACKNOWLEDGEMENT OF ADDENDA**

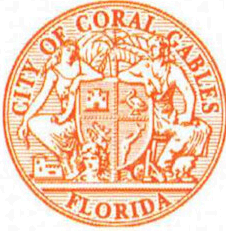
1. The undersigned agrees, if this RFP is accepted, to enter in a Contract with the CITY to perform and furnish all work as specified or indicated in the RFP, any associated addendum and Contract Documents within the contract time indicated in the RFP and in accordance with the other terms and conditions of the solicitation and contract documents.
2. Acknowledgement is hereby made of the following Addenda, if any (identified by number) received since issuance of the Request for Proposal.

Addendum No. 1 Date July 26, 2022 Addendum No. \_\_\_\_\_ Date \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date \_\_\_\_\_ Addendum No. \_\_\_\_\_ Date \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date \_\_\_\_\_ Addendum No. \_\_\_\_\_ Date \_\_\_\_\_

**Failure to adhere to changes communicated via any addendum may render your response non-responsive.**



**City of Coral Gables  
Finance Department/Procurement Division**

RFP 2022-014 Legislative Consulting Services

**Employer E-Verify Affidavit**

By executing this affidavit, the undersigned employer verifies its compliance with F.S. 448.095, stating affirmatively that the individual, firm or corporation has registered with and utilizes the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in F.S. 448.095 which prohibits the employment, contracting or sub-contracting with an unauthorized alien. The undersigned employer further confirms that it has obtained all necessary affidavits from its subcontractors, if applicable, in compliance with F.S. 448.095, and that such affidavits shall be provided to the City upon request. Failure to comply with the requirements of F.S. 448.095 may result in termination of the employer's contract with the City of Coral Gables. Finally, the undersigned employer hereby attests that its federal work authorization user identification number and date of authorization are as follows:

59-3584976

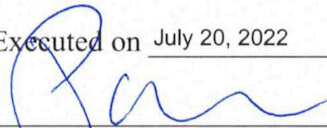
Federal Work Authorization User Identification Number

July 20, 2022

Date of Authorization

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

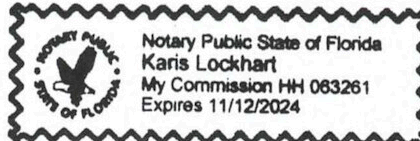
Executed on July 20, 2022 in Tallahassee (city), FL (state).

  
\_\_\_\_\_  
Signature of Authorized Officer or Agent

Paul Bradshaw, Founder and Chairman  
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE 20 DAY OF July, 2022 .

  
\_\_\_\_\_  
NOTARY PUBLIC  
My Commission Expires:  
11/12/2024



# MINIMUM QUALIFICATION REQUIREMENTS

## **(A) PROPOSERS SHALL:**

**1. Be regularly engaged in the business of providing the services described in this RFP for a minimum of five (5) years. Required Submittals: Three (3) client references including name, contact information including address/telephone/email, length of services provided, and the actual services provided to the client.**

Coral Gables has a strong interest in ensuring that their entire lobbying team (Proposers and any Sub-Contractors) meet the carefully selected and important minimum qualifications in this RFP. As such, both Proposer, The Southern Group, and Sub-Contractor, Ronald L. Book, P.A., meet and exceed all the minimum qualifications delineated in RFP No. 2022-014. The Southern Group and Ronald L. Book, P.A. have represented the City for the last five years, but have represented clients before the legislative and executive branches of government for nearly 60 years combined. Client reference details can be found on pages 42 and 43 of this proposal.

**2. Have no record of judgments, bankruptcies, pending lawsuits against the city or criminal activities involving moral turpitude.**

The Southern Group and Ronald L. Book, P.A. have no record of judgments, bankruptcies, pending lawsuits, nor any criminal activities, involving moral turpitude, nor any conflicts of interest, against the City.

**The following represent the qualification(s) required by the successful Proposer prior to final award or contract execution: 1. Provide proof of active status or documentation evidencing Proposer is currently seeking active status with the Florida Department of State, Division of Corporation. Submittals: Current Florida Department of State, Division of Corporation certificate or equivalent document.**

The Southern Group and Ronald L. Book, P.A.'s Department of State's certifications can be found on pages 33 and 34 of this proposal.



CITY OF CORAL GABLES  
FINANCE DEPARTMENT/PROCUREMENT DIVISION  
LOBBYIST REGISTRATION FORM

SOLICITATION NAME/NUMBER: Legislative Consulting Services RFP No. 2022-014

The Bidder/Proposer certifies that it understands if it has retained a lobbyist(s) to lobby in connection with this specific competitive solicitation that each lobbyist retained has timely filed the registration or amended registration required under the City of Coral Gables Lobbyist Registration requirement pursuant to Ordinance 2021-24 as outlined below:

*Lobbyist* means an individual, firm, corporation, partnership, or other legal entity employed or retained, whether paid or not, by a principal, or that contracts with a third-party for economic consideration to perform lobbying activities on behalf of a principal.

*Lobbying activity* means any attempt to influence or encourage the passage or defeat of, or modification to, governmental actions, including, but not limited to, ordinances, resolutions, rules, regulations, executive orders, and procurement actions or decisions of the city commission, the mayor, any city board or committee, or any city personnel. The term "lobbying activity" encompasses all forms of communication, whether oral, written, or electronic, during the entire decision-making process on actions, decisions, or recommendations which foreseeably will be heard or reviewed by city personnel. This definition shall be subject to the exceptions stated below.

*Procurement matter* means the city's processes for the purchase of goods and services, including, but not limited to, processes related to the acquisition of: technology; public works; design services; construction, professional architecture, engineering, landscape architecture, land surveying, and mapping services; the purchase, lease or sale of real property; and the acquisition, granting, or other interest in real property.

*City personnel* means those city officials, officers and employees who are entrusted with the day-to-day policy setting, operation, and management of certain defined city functions or areas of responsibility, even though ultimate responsibility for such functions or areas rests with the city commission, with the exception of the City Attorney, Deputy City Attorney, and Assistant City Attorneys, advisory personnel (members of city advisory boards and agencies whose sole or primary responsibility is to recommend legislation or give advice to the city commission); and any employee of a city department or division with the authority to participate in procurement matters, when the communication involves such procurement.

Affidavit requirement. The following provisions shall apply to certain individuals who, in procurement matters participate in oral presentations or recorded negotiation meetings and sessions:

- a. The principal shall list on an affidavit form, provided by the City, all technical experts or employees of the principal whose normal scope of employment does not include lobbying activities and whose sole participation in the city procurement matter involves an appearance and participation in a city procurement matter involves an appearance and participation in an oral presentation before a city certification, evaluation, selection, technical review or similar committee, or recorded negotiation meetings or sessions.
- b. No person shall appear before any procurement committee or at any procurement negotiation meeting or session on behalf of a principal unless he/she has been listed as part of the principal's presentation or negotiation team or has registered as a lobbyist. For purposes of this subsection only, the listed members of the oral presentation or negotiation team shall not be required to separately register as lobbyists or pay any registration fees. The affidavit will be filed by the city procurement staff with the city clerk at the after the proposal is submitted or prior to the recorded negotiation meeting or session. Notwithstanding the foregoing, any person who engages in lobbying activities in addition to appearing before a procurement committee to make an oral presentation, or at a recorded procurement negotiation meeting or session, shall comply with all lobbyist registration requirements.

The Bidder/Proposer hereby certifies that: (select one)

It has not retained a lobbyist(s) to lobby in connection with this competitive solicitation; however, if one is retained anytime during the competitive process and prior to contract execution for this project, the lobbyist will properly register with the City Clerk's Office within two (2) business days of being retained with copy to the city procurement staff.

It has retained a lobbyist(s) to lobby in connection with this competitive solicitation and certified that each lobbyist retained has timely filed the registration or amended registration required under the City of Coral Gables

CITY OF CORAL GABLES  
FINANCE DEPARTMENT/PROCUREMENT DIVISION  
LOBBYIST REGISTRATION FORM

Lobbyist Registration requirement pursuant to Ordinance 2021-24 Section and that the required affidavit has been properly filed


It is a requirement of this solicitation that the following information be provided for all lobbyists retained to lobby in connection with this solicitation be listed below:

Name of Lobbyist: Nelson Diaz  
Lobbyist's Firm (if applicable): The Southern Group of Florida, Inc.  
Phone: 305-421-6304  
E-mail: diaz@thesoutherngroup.com

Name of Lobbyist: Ronald Book  
Lobbyist's Firm (if applicable): Ronald L. Book, P.A.  
Phone: 305-935-1866  
E-mail: ron@rbookpa.com

Name of Lobbyist: Kate DeLoach  
Lobbyist's Firm (if applicable): The Southern Group of Florida, Inc.  
Phone: 305-421-6304  
E-mail: deloach@thesoutherngroup.com

Name of Lobbyist: Rana Brown / Kelly Mallette  
Lobbyist's Firm (if applicable): Ronald L. Book, P.A.  
Phone: 305-935-1866  
E-mail: rana@rbookpa.com / kelly@rbookpa.com

Authorized Signature:   
Printed Name: Nelson Diaz  
Date: 07/20/2022  
Title: Managing Partner  
Bidder/Proposer Name: The Southern Group of Florida, Inc.

LOBBYIST AFFIDAVIT

Solicitation Name/Number: Legislative Consulting Services RFP No. 2022-014

The following provisions shall apply to certain individuals who, in procurement matters participate in oral presentations or recorded responsiveness, responsibility or negotiation meetings and sessions:

- a. The principal shall list below all technical experts or employees of the principal whose normal scope of employment does not include lobbying activities and whose sole participation in the city procurement matter involves an appearance and participation in an oral presentation before an evaluation, selection, technical review or similar committee, or recorded responsiveness, responsibility or negotiation meetings or sessions.
- b. No person shall appear before any procurement committee or at any procurement responsiveness, responsibility or negotiation meeting or session on behalf of a principal unless he/she has been listed as part of the principal's team pursuant to this affidavit or has registered as a lobbyist. For purposes affidavit only, the listed members of the oral presentation or negotiation team shall not be required to separately register as lobbyists or pay any registration fees.

This affidavit will be provided by the city procurement staff to the city clerk after the proposal is submitted or prior to the oral presentation. Any changes after the original affidavit is submitted by the proposer and prior to the oral presentations, an updated copy shall be presented to the Procurement Division and the City Clerk at least twenty-four (24) hours prior scheduled time for the oral presentation session. Notwithstanding the foregoing, any person who engages in lobbying activities in addition to appearing before a procurement committee to make an oral presentation, or at a recorded procurement negotiation meeting or session, shall comply with all lobbyist registration requirements.

List of employees & technical experts:

NAME	TITLE	ROLE	COMPANY/FIRM
Nelson Diaz	Managing Partner		The Southern Group
Ronald Book	Founder, President, and CEO		Ronald L. Book, P.A.
Kate DeLoach	Partner		The Southern Group
Kelly Mallette	Senior Dir. of Govt. Affairs		Ronald L. Book, P.A.
Rana Brown	Govt. Affairs Consultant		Ronald L. Book, P.A.

CITY OF CORAL GABLES  
FINANCE DEPARTMENT/PROCUREMENT DIVISION

LOBBYIST AFFIDAVIT

I do solemnly swear that all of the foregoing information is true and correct and I will fully comply with requirements of this affidavit and the associated City of Coral Gables Lobbyist Registration requirement pursuant to Ordinance 2021-24 Section.

Authorized Signature: [Signature]  
Printed Name: **Nelson Diaz** Title: **Managing Partner**

Date: 07/20/2022  
Bidder/Proposer's Name: The Southern Group of Florida, Inc.

NOTARY PUBLIC

STATE OF Florida  
COUNTY OF Leon

On this 20 day of July, 2022, before me the undersigned Notary Public of the State of Florida, personally appeared Nelson Diaz (Name(s) of individual(s) who appeared before Notary

And whose name(s) is/are subscribed to within the instrument(s), and acknowledges it's execution.

[Signature]

NOTARY PUBLIC, STATE OF FL  
Karin Lockhart

(Name of notary Public; Print, Stamp or Type as Commissioned.)

SEAL OF OFFICE:

Personally know to me, or Produced

Identification: personally known  
(Type of Identification Produced)



**-- NOTICE --**

**BEFORE SUBMITTING YOUR RFP RESPONSE MAKE SURE YOU:**

- 1. Carefully read and have a clear understanding of the RFP, including the Scope of Services and enclosed Professional Services Agreement (*draft*).
- 2. Carefully follow the Submission Requirements outlined in Section 6 of the RFP and ensure you have submitted all of the required information. **DO NOT INCLUDE A COPY OF THE ORIGINAL SOLICITATION.**
- 3. **Prepare and submit ONE (1) electronic copy via PublicPurchase**
- 4. Make sure your Response is submitted prior to the submittal deadline. **Late responses will not be accepted.**

**FAILURE TO SUBMIT THIS CHECKLIST AND THE REQUESTED DOCUMENTATION MAY RENDER YOUR RESPONSE SUBMITTAL NON-RESPONSIVE AND CONSTITUTE GROUNDS FOR REJECTION. THIS PAGE IS TO BE RETURNED WITH YOUR RESPONSE PACKAGE.**



SECTION II: EXPERIENCE  
AND QUALIFICATIONS

# EXPERIENCE AND QUALIFICATIONS

The Southern Group of Florida, Inc. ("The Southern Group") and Sub-Contractor, Ronald L. Book, P.A. have enjoyed representing the City of Coral Gables ("City") in front of the legislative and executive branches of government for nearly five years. We are honored to have the opportunity to present our abilities and further enhance our partnership. The team of lobbyists will continue working collaboratively to leverage their experiences and relationships, serving as an extension of the City to coordinate and advance your priorities. This proposal outlines our experience and history, but also how we will continue to deliver results for you.

## WHO WE ARE

Since 1999, **The Southern Group** has built a bi-partisan team of 32 lobbyists who daily confront and overcome the challenges presented by the huge, complex and rapidly changing business, state and local government environments. We aren't simply professional advocates – we are connectors and strategic thought partners who understand how political, business and policy decisions impact an industry's ability to deliver customer value. Nelson Diaz, Managing Partner of The Southern Group's Miami and Florida Keys offices and Kate DeLoach, Partner in the Florida Keys office will serve on the City's lobbying team.

The Southern Group is the largest lobbying firm in the state. With offices located throughout Florida—Tallahassee (1999), Orlando (2005), Tampa Bay (2006), Jacksonville (2009), Miami (2009) and the Florida Keys (2018)—The Southern Group has a statewide presence that is unmatched. Ronald L. Book, P.A. operates full-time offices in Aventura and Tallahassee. By combining our resources in Tallahassee and full-time regional offices, the City will be well-served across the state of Florida.

**Ronald L. Book, P.A.** is a law firm specializing in government affairs and consulting. Incorporated in the state of Florida on January 29, 1987, the firm is a for profit, subchapter "S" corporation. The firm's founder and sole owner is Ronald L. Book, an attorney licensed to practice law in Florida, who also serves as the firm's president and chief executive officer. The law firm works exclusively in the lobbying and government affairs arena, offering state legislative and executive branch lobbying services to a wide variety of interests, including local governments, business and industry, corporations, professional associations, health care providers and not-for-profit organizations.

In addition to the lobbying team, The Southern Group is supported by a ten person Business Operations team. These individuals are located in each of the offices and manage all administrative tasks, assist with content creation, client visits to Tallahassee, project management and ensure the team is in compliance with all local and state lobbyist registrations. Ronald L. Book, P.A. has two executive support employees and four to six seasonal employees, who are legislative interns in the Tallahassee office.

## WHAT WE DO

Due to our long history of service to government entities, specifically the City, The Southern Group and Ronald L. Book, P.A. have the experience and expertise to continue assisting the City. Together, we will assist the City in navigating the complexities of securing specific budget priorities, crafting strategies to achieve success in the passage or defeat of legislation, and engaging with the executive and regulatory agencies who are vital in the implementation of appropriations or regulatory rule making. We are eager to continue to work as your advocate, providing you with reliable representation and strategic direction to navigate the political landscape in every arena of Florida government.

Given The Southern Group's long-standing reputation as the top lobbying firm in every market, our record of success and the unique skill sets of our lobbyists are second to none. Ronald L. Book, P.A. is also consistently ranked in the top five Tallahassee lobbying firms amongst various media sources and others who follow Florida politics.

The Southern Group and Ronald L. Book, P.A. lobby on behalf of dozens of local governments, pro sports teams, K-12 and higher educational institutions, and non-profit organizations – putting our lobbyists in the center of nearly every major policy discussion. We have experience with a vast array of issues including appropriations, economic development, environmental remediation, public finance and tax issues, human and social services, transportation, growth management, health care, seaports and aviation, and many, many more.

## HOW WE DO IT

The Southern Group and Ronald L. Book, P.A. are considered the leading lobbying firms in the state, boasting a virtually flawless record of success attaining clients' goals, which range from legal counseling on corporate and private matters to persuading lawmakers to support meritorious programs and causes. We will use our influence to meet your short-term needs, while also positioning the City for long-term success. Our team of lobbyists provide superior service grounded in several key factors:

- Our team of top-notch, highly professional lobbyists possess exceptional relationships with decision-makers across the state of Florida and subject matter expertise;
- Our reputation as a team of experts, uniting experience and relationships with innovation, agility, and strength to generate undeniable results;
- Our long history of constant and prompt communication with our clients;
- Our experience and track record of success on behalf of our clients, which will be used to develop and implement a strategy to position the City for further success in Florida;
- Our strong relationships with key leaders in both the executive and legislative branches of government across both political parties; and
- Our dedication to the highest level of customer service and quality. Documentation of The Southern Group's and Ronald L. Book, P.A.'s active status with the Florida Department of State, Division of Corporation, is included at the end of this section.



# THE TEAM



**Nelson Diaz**, Primary  
The Southern Group



**Ronald Book**, Sub-Contractor  
Ronald L. Book, P.A.



**Kate DeLoach**  
The Southern Group



**Rana Brown**  
Ronald L. Book, P.A.



**Kelly Mallette**  
Ronald L. Book, P.A.

## SUPPORTING TEAM



Oscar Anderson



Brian Bautista



Laura Boehmer



Paul Bradshaw



Oscar Braynon



David Browning



Edgar Castro



Kelly Cohen



Rachel Cone



Chris Dudley



Mercer Fearington



Jim Gilmore



Michelle Grimsley



Chris Hagan



Tasi Hogan



Justin Hollis



Nicole Kelly



Oneca Lowery



James McFaddin



Seth McKeel



Taylor Mejia



Paul Mitchell



Sydney Ridley



Erin Rock



David Shepp



Clark Smith



Monte Stevens



John Thrasher



Jared Torres



Sheela VanHoose

# PERSONNEL

The Southern Group and Ronald L. Book lobbyists below will serve as the City's core lobbying team; however, should any substitutions need to be made on an as-needed, relationship-specific basis, we will work directly with the City to ensure we have expressed permission and the appropriate team members assigned at all times.

**Nelson Diaz, Primary:** Nelson will serve as the City's main lobbying point of contact. Focusing on government and community relations, Nelson joined The Southern Group in 2013, successfully representing local governments, businesses, trade associations, and other corporate clients before the Florida legislative and executive branches of government. Nelson has expertise in policy areas including appropriations, finance and tax, political campaigns, economic and business development, family law, gaming, Hispanic outreach, housing, land use and development, oil and gas, strategic planning, transportation, and travel and tourism. He has served on the City of Miami's Historical and Environmental Preservation Board as well as the Miami-Dade County Community Council of West Kendall. Additionally, former Florida Governor Rick Scott appointed Nelson to the statewide Children and Youth Cabinet for his service and advocacy on behalf of Florida's children. Nelson earned a BA in international relations with a certificate in Latin American and Caribbean studies from Florida International University. He graduated from the University of Florida College of Law cum laude and was admitted to the Florida Bar in 2004.

**Ronald L. Book, P.A., Sub-Contractor:** Ron Book is the President and Chief Executive Officer of Ronald L. Book, P.A., a law firm that specializes in government affairs. Ronald L. Book, P.A. will serve as a sub-contractor for the City's lobbying efforts. Ron's history in the Florida political process dates back to the 1970's, when he began working for the Florida Legislature. He later served as Special Counsel to Florida Governor Bob Graham and as Director of the Administrative and Governmental Law Department for Miami-based Sparber, Shevin, Shapo, Heilbronner & Book, one of Florida's most influential law firms from 1977 to 1987. Over his career, Ron is responsible for billions in appropriations to various clients. Ron is a member in good standing of the Florida Bar. He is a registered lobbyist and a member of the Florida Association of Professional Lobbyists (FAPL).

**Kate DeLoach:** Kate will serve as a secondary point of contact for the City. Kate joined The Southern Group in 2019, opening the Florida Keys office. Kate served for six years as a district and legislative aide, which gave her invaluable experience navigating the legislative process and addressing policy and appropriations issues across a broad array of topics. Kate's time in government also gave her the opportunity to build strong relationships with individuals and organizations at the local, state, and federal levels, in both South Florida and Tallahassee.

**Kelly Mallete:** Kelly Mallete will serve as a secondary point of contact within Ronald L. Book, P.A. She has been a lobbyist in the firm for 18 years. She provides lobbying and advocacy services for numerous firm clients, including not-for-profit organizations, professional associations and multiple local governments. She has been instrumental to the firm in securing funding for special projects and making various substantive changes which are now law in Florida.

**Rana Brown:** Rana Brown joined Ronald L. Book, P.A. in 2008 and specializes in legislative procedure with emphasis on state and local government appropriations, policy issues and various private sector interests. Rana will serve as an additional point of contact for the City. Rana works directly with all firm local government clients, providing direct legislative and appropriations services, and for the Florida Regional Councils' Association, a statewide organization.



## Nelson D. Diaz

Nelson is a Managing Partner in our Miami and Florida Keys offices.

Nelson Diaz joined The Southern Group's Miami office in 2013. Focusing on government and community relations, Nelson has successfully represented local governments, businesses, trade associations, and other corporate clients before the Florida legislative and executive branches of government. Nelson has expertise in policy areas including appropriations, finance and tax, campaigns, economic and business development, family law, gaming, Hispanic outreach, housing, land use and development, oil and gas, strategic planning, transportation, and travel and tourism.

Nelson began his political career as a volunteer in the 1996 presidential campaign, where he and other young leaders, including current U.S. Senator Marco Rubio and former Lt. Governor Carlos Lopez Cantera, worked to build a strong Republican Party base in South Florida. Since then, Nelson has worked on numerous political campaigns at every level, from presidential and U.S. Senate races to state races for governor, cabinet offices, Florida Senate and House of Representatives, as well as local campaigns for county commission, city council, and mayor. He also served as chief legislative aide to Marco Rubio when he was a member of the Florida House of Representatives. As a result of Nelson's service with Senator Rubio and his involvement in political campaigns, he has established an extensive network of contacts in Miami-Dade County and within the Florida Legislature. Nelson currently serves on Senator Rubio's Judicial Advisory Commission.


In 15 years as a lobbyist, Nelson has represented corporate entities before the Miami-Dade County Board of County Commissioners, numerous Miami-Dade County agencies and departments, City of Miami, City of Hialeah, and several other municipal governments and authorities.

Nelson has successfully guided many corporate clients entering the south Florida market, providing community relations services and advising them how to navigate the local political waters.

Nelson is active in many local business and civic organizations. He served as chair of the Republican Party of Miami-Dade County from 2012-2020 and currently serves on the executive board of the Republican Party of Florida. Nelson has served on the City of Miami's Historical and Environmental Preservation Board as well as the Miami-Dade County Community Council of West Kendall. Additionally, Nelson is a past president of the Board of Directors for Kristi House. Former Florida Governor Rick Scott appointed Nelson to the statewide Children and Youth Cabinet for his service and advocacy on behalf of Florida's children.

Nelson earned a BA in international relations with a certificate in Latin American and Caribbean studies from Florida International University. He graduated from the University of Florida College of Law cum laude and was admitted to the Florida Bar in 2004. Nelson lives in Miami with his wife and daughter.

 [diaz@thesoutherngroup.com](mailto:diaz@thesoutherngroup.com)

 305.421.6304

 [Connect on LinkedIn](#)

Influence creates opportunity. Let us show you how.





## Ronald L. Book

Ronald Book is President and Chief Executive Officer of Ronald L. Book, P.A., a law firm that specializes in government affairs. Established in 1987, it is considered one of the premier lobbying firms in the state. Ron's history in the Florida political process dates back to the 1970's, when he began working for the Florida Legislature. He later served as Special Counsel to Florida Governor Bob Graham and as Director of the Administrative and Governmental Law Department for Miami-based Sparber, Shevin, Shapo, Heilbronner & Book, one of Florida's most influential law firms from 1977 to 1987.

Since opening his own firm in 1987, Ron has developed a client list that is literally a "who's who" of local governments, business and industry, health care and not-for-profit associations. His reputation as a hard worker, dedicated to his client's causes, has earned him a place in the upper echelon of Tallahassee power. Associates, clients and lawmakers describe Ron Book and his firm as committed, tenacious, knowledgeable and credible.

It is difficult to narrow Mr. Book's areas of expertise to simply a few. He has experience with a vast array of issues including appropriations, economic development, environmental remediation, public finance and tax issues, human and social services, transportation, growth management, health care, seaports and aviation, and many, many more. Simply put, if it is an issue that you have read about, Mr. Book has been at the center of the debate, influencing the decisions of policymakers for the past 45 legislative sessions.

Over his career, Mr. Book is responsible for literally, billions in appropriations to various clients. During the 2017 and 2018 sessions, the firm secured over \$200 million for clients, more than \$24 million of which was for local water projects. In addition to that, Mr. Book has the following iconic, legacy accomplishments, of which the firm is very proud.

- Negotiation of Port of Miami Tunnel Project, which Mr. Book revived after it was shelved by the Governor;
- Passage of the Extremely Low-Income housing program and \$30 million in initial-funding;
- Reauthorization of the Affordable Housing Surtax for Miami-Dade County;
- Dedicated revenue source amounting to millions for the Miami Project to Cure Paralysis
- \$50 million special appropriation for Jackson Health System
- Passed legislation authorizing a long-term lease (\$1 per year) of the South Florida Evaluation and Treatment Center for Miami-Dade County, which yielded an \$18 million savings to the County
- \$55 million for the Port of Miami Deep Dredge

Mr. Book is a member in good standing of the Florida Bar. He is a registered lobbyist and a member of the Florida Association of Professional Lobbyists (FAPL).

 [ron@rlbookpa.com](mailto:ron@rlbookpa.com)

 305.935.1866



## Kate DeLoach

Kate DeLoach joined The Southern Group in 2019, opening the firm's sixth regional office in the Florida Keys. An eighth-generation Floridian and Florida Keys native, Kate has a deep understanding of the challenges facing the Florida Keys as an Area of Critical State Concern, including complex issues related to commercial and recreational fishing, economic development, land use and development, marine resources, natural resource protection, property insurance, transportation, and travel and tourism.

Kate served for six years as a district and legislative aide, which gave her invaluable experience navigating the legislative process and addressing policy and appropriations issues across a broad array of topics.


Kate's time in government also gave her the opportunity to build strong relationships with individuals and organizations at the local, state, and federal levels, in both South Florida and Tallahassee.

Since joining The Southern Group, Kate has represented clients at the state and local levels in a variety of issue areas including insurance, appropriations, education, economic development, and environmental policy.

Kate serves on the board of numerous local organizations, including the Mariners Hospital Board of Directors, the Florida Keys History & Discovery Foundation, the Good Health Clinic, and the Monroe County Historic Preservation Commission.

Kate earned her BA from Flagler College in St. Augustine and her MA in international affairs from The City College of New York. Kate also earned a graduate certificate in Natural Resource Policy and Administration from the University of Florida. Kate lives in the Florida Keys with her husband, John.

 deloach@thesoutherngroup.com

 305.421.6304

Influence creates opportunity. Let us show you how.





## Rana G. Brown

Rana Brown joined Ronald L. Book, P.A. in 2008 and specializes in legislative procedure with emphasis on state and local government and various private sector interests. Ms. Brown works directly with all firm local government clients, providing direct legislative and appropriations services, and for the Florida Regional Councils' Association, a statewide organization.

Her work with multiple local governments as well as with the Florida Regional Councils' utilizes her in-depth knowledge of municipal issues. Prior to joining Ronald L. Book, P.A., Ms. Brown headed the Advocacy Department of the Greater Miami Chamber of Commerce where she was tasked with an overall restructure of the Chamber's government affairs department, to address issues affecting the business community at the local, state, and federal levels. Prior to her work at the Chamber, Ms. Brown held the position of Assistant Director of Intergovernmental Affairs within the office of the Mayor of Miami-Dade County, where she worked on behalf of the County before the Florida legislature, state agencies and executive branch. Ms. Brown's experience also includes nine years as staff in the Florida Senate, several of which were in the office of the Senate President, and six years as a legislative assistant to a South Florida legislator.

Ms. Brown holds a B.A. in History from Florida State University. She is a registered lobbyist and a member of the Florida Association of Professional Lobbyists.

 rana@rlbookpa.com

 305.935.1866



## Kelly C. Mallette

Kelly Mallette has been a lobbyist in the firm for 18 years. She provides lobbying and advocacy services for numerous firm clients, including not-for-profit organizations, professional associations and multiple local governments. She has been instrumental to the firm in securing funding for special projects and making various substantive changes which are now law in Florida. Kelly is known amongst the firm's clients for her superior communication skills, both verbal and written. It's not unusual for a client to see Kelly's writing end up in official documents like veto messages, speeches and substantive legislation. Kelly's experience as a Senate aide to the former Chairman of the Senate Appropriations Subcommittee on Health and Human Services has provided her with a unique insight into Florida's budget process, including knowledge of important policies and priorities, and strong relationships with appropriations staffers.

Kelly's entry into Tallahassee politics began many years ago, when, at the age of 19, she worked as an intern to one of Florida's most recognized lobbyists. She later served as Senior Policy Advisor to the Mayor of Miami. Active in Republican politics, Kelly is on the Board of Directors of the Miami-Dade Republican Party, and is also the chair of the Finance Committee. She was named Republican of the Year for Miami-Dade County in 2015, and she has been a delegate at each of the last three Republican National Conventions.

Kelly recently served a 4-year term as a Commissioner in the Village of Biscayne Park, her hometown. She is a registered lobbyist and a member of the Florida Association of Professional Lobbyists (FAPL).



kelly@rlbookpa.com



305.935.1866



## MEMBER PROFILE

HOME / DIRECTORIES / LAWYER DIRECTORY / MEMBER PROFILE

### DIRECTORIES

Lawyer Directory

Authorized House Counsels

Certified Foreign Legal Consultants

Law Faculty Affiliates

Florida Registered Paralegals

Courts

Legal Groups

Judicial Nominating Commissions

State of Florida

Federal Government

## Ronald Lee Book

Member in Good Standing

Eligible to Practice Law in Florida

Bar Number: 257915

**Mail Address:** Ronald L. Book, P.A.  
18851 NE 29th Ave Ste 1010  
Aventura, FL 33180-2848  
Office: 305-935-1866  
Fax: 305-935-9737



**Email:** ron@rlbookpa.com

**Personal Bar URL:** <https://www.floridabar.org/mybarprofile/257915>

**vCard:**

**County:** Miami-Dade

**Circuit:** 11

**Admitted:** 09/15/1978

**10-Year Discipline History:** None

**Law School:** Tulane University Law School

**Sections:** Administrative Law  
City, County & Local Govt Law  
Public Interest Law

**Firm:** Ronald L. Book, P.A.

**Firm Size:** 2-5

**Firm Position:** Private Law Practice

**Firm Website:** <http://www.rlbookpa.com>

The Find a Lawyer directory is provided as a public service. The Florida Bar maintains limited basic information about lawyers licensed to practice in the state (e.g., name, address, year of birth, gender, law schools attended, admission year). However, the Florida Bar allows individual attorneys the opportunity to add personal and professional information to the directory. The lawyer is solely responsible for reviewing and updating any additional information in the directory. The lawyers added information is not reviewed by the Bar for accuracy and the Bar makes no warranty of any kind, express or implied. The Florida Bar, its Board of Governors, employees, and agents are not responsible for the accuracy of that additional information. Publication of lawyers' contact information in this listing does not mean the lawyers have agreed to receive unsolicited communications in any form. Unauthorized use of the data may result in civil or criminal penalties. The Find a Lawyer directory is not a lawyer referral service.

There is no licensing requirement in the state of Florida for lobbying firms, therefore the The Southern Group is not licensed; however, Ronald L. Book, P.A. is a licensed Florida law firm. The state of Florida does require individual lobbyists to be registered via Florida Lobbyist Registration and Compensation (<https://floridalobbyist.gov/>). All lobbyists stated in this RFP are properly registered with the state of Florida.





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/13/2022

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

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

PRODUCER Fletcher & Company 1211 North 3rd Street Jacksonville Beach, FL 32250	CONTACT NAME: <b>Debra Shafer</b>	FAX (A/C, No):	
	PHONE (A/C, No, Ext): <b>(904) 694-0317</b>	E-MAIL ADDRESS: <b>dshafer@fletcherandcompanyfl.com</b>	
INSURED  The Southern Group of Florida Inc PO Box 10570 Tallahassee, FL 32302	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A : <b>Southern-Owners Insurance Company</b>	<b>10190</b>	
	INSURER B : <b>Travelers Casualty and Surety Company</b>	<b>19038</b>	
	INSURER C : <b>Bridgeway Insurance Company</b>	<b>12489</b>	
	INSURER D :		
	INSURER E :		
	INSURER F :		

### COVERAGES

### CERTIFICATE NUMBER:

### REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>COMMERCIAL GENERAL LIABILITY</b> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	X	78131095	3/1/2022	3/1/2023	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>300,000</b> MED EXP (Any one person) \$ <b>10,000</b> PERSONAL & ADV INJURY \$ <b>Excluded</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b>
A	<b>AUTOMOBILE LIABILITY</b> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			78131095	3/1/2022	3/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ <b>10,000</b>			4440409700	3/1/2022	3/1/2023	EACH OCCURRENCE \$ <b>2,000,000</b> AGGREGATE \$ <b>2,000,000</b>
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N	N / A	X UB-1R064791-22-42	7/15/2022	7/15/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
C	<b>Professional Liabili</b>			7GA7PL0000916-01	3/5/2022	3/5/2023	<b>Occurrence</b> \$ <b>1,000,000</b>
C	<b>Professional Liabili</b>			7GA7PL0000916-01	3/5/2022	3/5/2023	<b>Aggregate</b> \$ <b>1,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
City of Coral Gables included as Additional insured as respects to General Liability including Primary and Non-Contributory, as required by written contract.  
Professional Liability Includes - Personal & Advertising Injury \$1,000,000  
Waiver of Subrogation, as respects to General Liability and Workers Compensation, as required by written contract. 30 Days notice of Cancellation Except 10 days for Non-Payment.

### CERTIFICATE HOLDER

### CANCELLATION

City of Coral Gables Insurance Compliance PO Box 100085 - CE Duluth, GA 30096	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

# *State of Florida*

## *Department of State*

I certify from the records of this office that THE SOUTHERN GROUP OF FLORIDA, INC is a corporation organized under the laws of the State of Florida, filed on June 21, 1999.

The document number of this corporation is P99000055999.

I further certify that said corporation has paid all fees due this office through December 31, 2022, that its most recent annual report/uniform business report was filed on March 29, 2022, and that 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-ninth day of March,  
2022*



*Laurel M. Bee*  
**Secretary of State**

Tracking Number: 4214525275CC

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

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

# *State of Florida*

## *Department of State*

I certify from the records of this office that RONALD L. BOOK, P.A. is a corporation organized under the laws of the State of Florida, filed on January 29, 1987.


The document number of this corporation is J54314.

I further certify that said corporation has paid all fees due this office through December 31, 2022, that its most recent annual report/uniform business report was filed on January 24, 2022, and that 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 Sixth day of July, 2022*




  
*Secretary of State*

Tracking Number: 1479421504CU

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

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

A grayscale photograph of two men in business attire sitting at a table. The man on the right is smiling broadly and holding a smartphone. The man on the left is looking towards the camera with a neutral expression. The background shows a wall with a decorative vertical panel. The entire image is overlaid with a semi-transparent dark gray filter.

## SECTION III: PROJECT APPROACH AND METHODOLOGY

# PROJECT APPROACH AND METHODOLOGY

The Southern Group and Ronald L. Book, P.A. have supported the goals and interests of Florida's cities, counties and local government entities for decades. We believe in the power of local advocacy and we are ready to continue serving as a champion for the City in Tallahassee. By combining our firm's resources, we are able to divide and conquer on many policy issues, avoiding any possible conflicts of interests which may arise.

## **EVERY SUCCESSFUL LOBBYING CAMPAIGN STARTS WITH A PLAN**

The Southern Group and Ronald L. Book P.A.'s offices provide unrivaled access to decision-makers across the state of Florida all year long. The Southern Group is "local" in every major metropolis where legislators are clustered. This means that our lobbyists spend a majority of the year working and socializing with legislators even those outside of your region. This advantage shows in our results – ***our clients have secured hundreds of millions in state funding year after year.***

Separate and a part, The Southern Group and Ronald L. Book, P.A. have a stellar track record of winning for its clients, be it related to licensure, rule-making, policy or funding-related, and we will bring our time-tested strategies and methods to bear on behalf of the City.

We are successful because of the broad themes that characterize how we approach projects: ***communication, teamwork, and an objective measure for success.***

- We evaluate our relationships with key policymakers and staff, maintaining an internal relationship matrix of an ever-changing cast of state leaders and staff.
- We hold weekly (and sometimes daily) internal strategy discussions during and outside of Legislative Session with our entire team of lobbyists to review client issues.
- We utilize our project management dashboard to keep track of tasks and goals across the team.
- We proactively communicate with clients, providing verbal and written reports.
- We consistently talk about our clients and their needs. We have developed a process for our team to rapidly communicate and move information across the state quickly for the benefit of our clients.

## **2023 LEGISLATIVE SESSION**

The upcoming 60-day Legislative Session will begin on March 7, 2023. The Interim-Committee weeks prior to March have not yet been announced, but are expected to take place after the November Organization Session. To prepare for the upcoming Session, we suggest the following timeline:

**June - August:** This is when the Governor's Agencies begin to develop their proposed budgets.

- Devise our 2023 Session policy and budget strategy.
- Educate elected and state officials on the importance of the City's priorities.
- Compile materials and leave behinds for member meetings.

**September - December:** State agencies present their Long-Range Program Plan that outlines five years of priority programs, budget needs and agency implementation goals by September 30th. By October 15th, the Program Plans help shape agency Legislative Budget Requests (LBRs), which provide breakdowns of how much money agencies require for personnel and other needs.

- Meet officials within relevant state agencies and legislative committee staff.
- Make introductions between the City and the Governor's Office leadership team.
- After the General Election (November 8th) an Organization Session will take place in Tallahassee.

**January/February:** The Governor uses the LBRs to make his budget recommendations for each state agency. His proposed budget must be presented 30 days before the beginning of legislative session.

- Interim Committee Weeks will take place. Dates are to be announced.
- Secure bill sponsors and complete necessary appropriations project request forms.
- Monitoring bill drafts and filings that may affect the City's operations.

**March - May:** The 60-day legislative session will kick off on March 7th. During session, we will navigate the budget process in both chambers, ensuring bills are heard in their respective committee stops. During the last week of session, budget conference will take place where each chamber negotiates their budget priorities.

- Follow House Rules (TBA) on filing appropriations requests.
- Submit Senate Local Funding Initiative Request (LFIR) form.
- Navigate the appropriations projects process in each chamber to ensure bills are heard.

**May - July:** The Governor will be sent the Fiscal Year 2023-2024 budget in the early Summer. Your Southern Group team will continue to work with the Governor's office and ensure budgets items and potential legislation is acted upon in the City's best interest.

## **RELATIONSHIPS ARE KEY**

Relationship building and advocacy are The Southern Group's core competency. The Southern Group and Ronald L. Book, P.A. have great relationships with just about every elected official, stakeholder and decision maker in Tallahassee and throughout Florida, all of which have been, and will continue to be utilized advocating on behalf the City's funding and policy priorities.

The team assembled in this proposal has great working and personal relationships with the City's Legislative delegation, Sen. Ileana Garcia, Rep. Demi Busatta-Cabrera, Rep. Bryan Avila, Rep. Nick Duran and as well as key leaders within the Miami-Dade County delegation. Their support has been, and will continue to be, critical to implementing the City's legislative agenda in Tallahassee. It is important to note with this election cycle falling during reapportionment, our team is conscious of the elections in your region and are prepared to work with any newly elected member of the Miami-Dade County delegation.

Additionally, maintaining relationships with our advocacy partners is also key to the City's success. Our lobbyists are deeply involved with the Florida Association of Counties, the Florida City and County Manager Association, Florida Association of Intergovernmental Relations, Florida League of Cities, and other local government stakeholder groups, which we work closely with as priorities align. Our relationships with public entities extend to the local level as well. Our team works closely with leadership at the local universities, community colleges, school districts and counties. These high-level relationships combined with the knowledge of what issues are important to them, is a valuable asset that The Southern Group and Ronald L. Book, P.A. can bring together to build potential partnerships.

## **APPROPRIATIONS SUCCESS**

Funding opportunities through the state are not simply awarded, they are earned, through hard work and tireless advocacy. Due to our extensive experience working with local governments and knowledge of Legislative leadership priorities, we have been able to advise the City on which appropriations projects have the most chance of success. This has been proven year after year by our continued success of the City's priorities.

Over the past five years, we have secured \$9,195,000 in the state's budget for the City of Coral Gables, with nearly 90% of those funds avoiding the Governor's veto pen, bringing the total number of funding provided to the City to \$8,220,000.

- Repair of Historic Gondola Building- \$750,000
- Betsy Adams & Coral Gables Garden Club Park & Maggiore Park- \$50,000 each (FRDAP)
- Fire Station at Cartagena Park- \$1,500,000
- Comprehensive I & I Program- \$100,000
- Galliano Street and Madeira Avenue Stormwater Project- \$200,000
- Granada and Coral Way Hardening Project- \$375,000
- City-wide Septic to Sewer Conversion Assessment- \$375,000
- Legacy Sewer System Repair & Replacement- \$500,000
- Stormwater Master Plan- \$500,000
- Blue Road Neighborhood Park- \$200,000 (FRDAP)
- Toledo & Alava Neighborhood Park- \$200,000 (FRDAP)

## INFLUENCE ON POLICY

Over several legislative sessions, the Legislature increasingly files a variety of policy issues negatively affecting local governments. Collectively, our firms have been at the center of this debate, working to keep local government priorities at the forefront and included as part of changing policy, as these proposals are considered. Below are a few examples of our work on behalf of local governments.

**SB 974/HB 985, Sovereign Immunity:** In the 2022 Session and over the last several legislative sessions as well, the Legislature has pursued a variety of bills that would have restructured sovereign immunity to increase the caps for damages against local governments, per person and per incident, implemented an annual adjustment to the cap based on the Consumer Price Index, made changes to statute of limitations, among other issues, all of which would have a significant negative fiscal impact. We continually work with key legislators to voice strong opposition on behalf of local governments.

**HB 403/SB 280, Local Ordinance Preemption Bills:** During the 2022 legislative session, we worked with other stakeholder groups, including the Florida League of Cities to limit the impact this bill would have on the City. While changes were made, ultimately, we were successful in keeping these bills from moving forward.

**HB 7053/SB 1940, Statewide Flooding & Sea Level Rise Resiliency-** Sponsored by Coral Gables Representative Demi Busatta Cabrera, this bill expanded on legislation passed last year and established a statewide Office of Resilience to be housed within the Executive Office of the Governor.

**HB 17, Community Redevelopment Agencies:** During the 2018 legislative session, we successfully kept this bill from moving forward in the Senate and stopped an effort on the last day of session to amend the bill's language onto a different bill.

**HB 243, Charter County & Regional Transportation System Surtax Preemption:** During the 2018 legislative session, HB 243 would have caused a \$100 million deficit in the County's transportation department. We were successful in amending the bill to allow municipalities to continue to use their portion of the surtax to fund their trolley systems, but the bill ultimately died in the Senate.

## MONITORING AND REPORTING

The Southern Group strives to keep our clients engaged and informed throughout the year. Our daily newsletter, *What's Trending Florida*, offers a high-level, insider's point-of-view of what is happening at all levels of government. Throughout the interim committee weeks and legislative session our team will provide bill and committee reports relative to the City's areas of interests. Upon the conclusion of Legislative Session, our team takes a deep dive into the budget and provides budget summaries by silos for our clients to better understand the funding resources available in the upcoming year(s).



When the legislature is not in Session, our team hosts webinars for our clients to stay engaged in policy discussions and further build their relationships with decision makers. Our clients have participated in webinars focused on Transportation, Infrastructure and Resiliency issues, Technology, a Pre-Session discussion with leaders in the legislative process, and a Legislative wrap up on the recent School Safety bill.

At the conclusion of every Legislative Session, the City's lobbying team has always submitted and will continue to submit annual End of Session Reports summarizing the status of the City's legislative priorities, as well as provide timely updates on appropriations projects. Our team has continued to show its accessibility year-round to the City in-and-out of session. Our team is accessible by call, text and emails on a daily basis.

## **LOGISITICS**

The City's leaders will have full access to both The Southern Group and Ronald L. Book's offices for meetings and appointments. The Southern Group's 11,000 square foot Tallahassee office is conveniently located to provide ready access to the capitol and other major state government buildings. It has room for guests and large meetings for our clients. We routinely hold receptions in our office for our clients to engage with legislators and other decision makers.

In addition to our available meeting space, your lobbying team is readily available to assist with the scheduling of Tallahassee in-person meetings with members of the Legislative and Executive Branches. During previous sessions, we have coordinated meetings with key influential members of the House and Senate, decision-makers within the Executive Branch such as Chris Spencer with the Office of Policy and Budget, and most notably, Governor Ron DeSantis. Our team is able to assist with meeting preparations, including but not limited to drafting leave-behind materials, compiling background information and bios of your meeting attendees, assisting with meals, and assist with travel logistics.



# SECTION IV: PAST PERFORMANCE AND REFERENCES

# REFERENCES



## **TRICIA JOHNSON, DEPUTY COUNTY MANAGER**

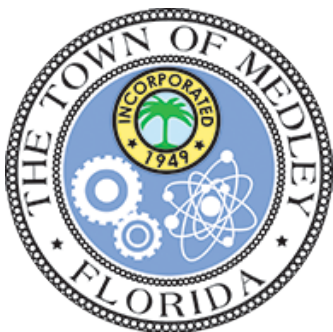
The scope of services The Southern Group and Ronald L. Book, P.A. provide is comparable to those requested in RFP No. 2022-14. Seminole County's primary focus has been obtaining state funding for their transportation and water quality needs throughout the County and region. We have been successful in obtaining funding for the County's priority projects, listed below:

- 2022: \$1 million for the E.E. Williamson Road Trail Connect Project, \$500,000 for the Wekiva Springs Road Intersection Improvements
- 2021: \$500,000 for the Little Wekiva River Restoration Project
- 2020: \$500,000 for the Lake Jesup Watershed Project
- 2019: \$425,000 for the Lake Jesup Basin, Lake of the Wood water quality improvements, and secured \$4,068,697 for the reimbursement to the County for expenditures made for their Juvenile Detention Center.

PHONE: (407) 666-7224      EMAIL: [tajohnson@seminolecountyfl.gov](mailto:tajohnson@seminolecountyfl.gov)

ADDRESS: 1101 E. First St., Ste. 3010 Sanford, FL 32771

CONTRACT AMOUNT: \$120,000/year      CONTRACT TERM: 2018-Present



## **ROBERTO MARTELL, MAYOR**

The Southern Group has represented Town of Medley with a very similar scope of work as outlined in this proposal. We have secured numerous appropriations projects for them over the year, including:

- 2022: \$500,000 for NW 78th Street & NW 77 Street Roadway & Drainage Improvements and \$500,00 for NW 93rd Street Roadway Widening
- 2019: \$500,000 for the NW South River Drive Street Drainage and Mobility Project
- 2018: \$500,000 for the 96th Street Drainage project

PHONE: (305) 887-9541      EMAIL: [rmartell@townofmedley.com](mailto:rmartell@townofmedley.com)

ADDRESS: 7777 NW 72nd Ave, Medley, FL33166

CONTRACT AMOUNT: \$66,000/year      CONTRACT TERM: 2018-Present

# REFERENCES



## **MIKE MCNEES, CITY MANAGER**

The scope of services we provide is comparable to those requested in RFP No. 2022-14. A specific example of work on behalf of the City involves pursuing legislation that would allow for the City to apply for a Certificate of Public Convenience and Necessity (COPCN) license directly from the State. During the 2018 Session, Ronald L. Book, P.A. pursued and passed a local bill allowing the City to apply for and be issued a license directly from the State. Additionally, we secured the following funding during the 2022 Session:

- \$1,702,512 for the Marco Island Smokehouse Bay Bridge Replacement
- \$416,745 for the Marco Island Canal Flushing Improvement Project, bringing immediate funding to issues affecting residents' safety.

PHONE: (239) 389-5000      EMAIL: [mmcnees@cityofmarcoisland.com](mailto:mmcnees@cityofmarcoisland.com)

ADDRESS: 50 Bald Eagle Dr. Marco Island, FL 34145

CONTRACT AMOUNT: \$60,000/year      CONTRACT TERM: 2014-Present



## **MARK MCQUEEN, CITY MANAGER**

The Southern Group assists the City with work comparable to the efforts outlined in these scope of services. During the 2021 session, we secured \$7 million for a water treatment plant. In 2022, The Southern Group secured \$10 million in the state budget. Examples of those projects are:

- \$5,000,000 for Sidewalk Improvements
- \$2,500,000 for the Four Regional Parks project
- \$1,750,000 for Kings Bayou/Pretty Bayou Sewer and Water System Expansion Phase II
- \$750,000 for a Stormwater Management Study

PHONE: (850) 872-3010      EMAIL: [mmcqueen@panamacity.gov](mailto:mmcqueen@panamacity.gov)

ADDRESS: P.O. Box 1880 Panama City, Florida 32402

CONTRACT AMOUNT: \$90,000/year      CONTRACT TERM: 2019-Present

Neither The Southern Group or Ronald L. Book, P.A. have public sector client who have discontinued use of our services within the past two (2) years.

**3. Please identify each incident within the last five (5) years where (a) a civil, criminal, administrative, other similar proceeding was filed or is pending, if such proceeding arises from or is a dispute concerning the Proposer's rights, remedies or duties under a contract for the same or similar type services to be provided under this RFP (See Affidavit D).**

Neither The Southern Group or Ronald L. Book, P.A. have incidents within the last five (5) years to report.



# SECTION V: PRICE PROPOSAL

**Addendum 1\_Attachment 2**

**REVISED PROPOSAL PRICING FORM**  
**RFP 2022-014 Legislative Consulting Services**  
**SOLICITATION CLOSING DATE: August 1, 2022 at 2:00 P.M.**

This solicitation will be awarded to the highest ranked responsive and responsible proposer(s), based on the criteria outlined in this solicitation. The City in it's sole discretion will determine if it is in the best interest of the City to move forward with the award.

VENDOR: The Southern Group of Florida, Inc. FEIN: 59-3584976

Services	Proposed Monthly Fee	Total Annual Fee
Legislative Consulting Services at Local & State Level	\$8,000	\$96,000

**NOTE:** Unit Price shall include, but not be limited to, full compensation for labor, supervision, personnel, materials, any and all tools and equipment used, travel and related expenses and any and all other costs to the Bidder. The City will not pay and/or reimburse any additional costs including, but not limited to, travel, mileage, lodging, meals, and other travel and subsistence expenses. Pricing shall remain fixed and firm for the term of the contract, including renewal options.

Authorized Signature:   
 Print/Type Name: Nelson Diaz  
 E-mail: Diaz@thesoutherngroup.com  
 Address: 123 S. Adams Street

Title: Managing Partner  
 Phone: 850-671-4401  
 Fax: 850-671-4402  
 City: Tallahassee State: Florida

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF THE BIDDER TO BE BOUND BY THE TERMS OF ITS BID. FAILURE TO SIGN THIS BID PRICE FORM WHERE INDICATED ABOVE BY AN AUTHORIZED REPRESENTATIVE OR PROVIDE THE FORM AS PRESENTED MAY RENDER THE BIDDER NON-RESPONSIVE.



# SECTION VI: AGREEMENT COMMENTS/EXCEPTIONS



# AGREEMENT EXECUTION

The Southern Group accepts the terms and conditions of the City's Agreement. We look forward to continuing our representation of the City's interests.



Influence creates opportunity.  
Let us show you how.

[TheSouthernGroup.com](http://TheSouthernGroup.com)

