



RFP NO. 2024-041
CONSULTING SERVICES FOR SPECIAL ASSESSMENT DISTRICT PLAN

SUBMITTED TO: CITY OF CORAL GABLES

SUBMITTED BY: **PROGRESSIVE URBAN MANAGEMENT ASSOCIATES**

1201 E. COLFAX AVE., SUITE 201
DENVER, CO 80218
720.668.9991

CONTACT: BRAD SEGAL
BRAD@PUMAWORLDDHQ.COM

JANUARY 23, 2025

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CITY OF CORAL GABLES, FL

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

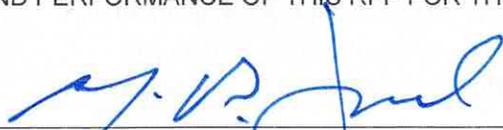
PROPOSER'S ACKNOWLEDGEMENT

<p>RFP No.: 2024-041</p> <p>RFP Title: Consulting Services for Special Assessment District Plan</p>	<p>Electronic submittals must be received prior to 2:00 p.m., January 24, 2025, via INFOR and will remain valid for 120 calendar days. Submittals received after the specified date and time will not be accepted.</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>Neivy Garcia Title: Procurement Specialist Telephone: 305-460-5121 Email: ngarcia2@coralgables.com contracts@coralgables.com</p>

<p>Proposer Name: <u>PROGRESSIVE URBAN MANAGEMENT ASSOCIATES</u></p>	<p>FEIN or SS Number: <u>84-1108806</u></p>
<p>Complete Mailing Address: <u>1201 E. COLFAX AVE, S. 201 DENVER, CO 80218</u></p>	<p>Telephone No.: <u>303-997-8754</u></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>Cellular No.: <u>303-250-4906</u></p>
<p>Bid Bond/Security Bond (if applicable) N/A</p>	<p>Fax No.: _____ Email: <u>BRAD@PUMMANAGEMENT.COM</u></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
M. B. SEITZ

PRESIDENT

 Title

1-21-25

 Date

SOLICITATION SUBMISSION CHECKLIST

Request for Proposals (RFP) No. 2024-041

COMPANY NAME: (Please Print): <u>Progressive Urban Management Associates</u> Phone: <u>720-668-9991</u> Email: <u>brad@pumaworldhq.com</u>

A response package numbered by page must be submitted ELECTRONICALLY via INFOR. Please provide the PAGE NUMBER 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 # 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 # 3
- 3) Fill out, sign, and submit the Proposer's Acknowledgement Form. PAGE # 4
- 4) Fill out and submit the Solicitation Submission Check List. PAGE # 5
- 5) Fill out, sign, notarize (as applicable), and submit the Proposer's Affidavit and Schedules A through H. PAGE # 8-14
- 6) Fill out, E-Verify Affidavit PAGE # 15
- 7) Minimum Qualification Requirements: submit detailed verifiable information affirmatively documenting compliance with the Minimum Qualifications Requirements shown in Section 3. PAGE # 12
- 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 # 21
- 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 # 21-27

(ii) FOR KEY PERSONNEL:

- 1) Provide a summary of the qualifications, copy of applicable licenses/certifications, and experience of all proposed key personnel. Include 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 # 22-27**SUBMITTAL - SECTION III: PROJECT APPROACH AND METHODOLOGY**

- 1) Describe in detail your approach to performing 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 and communication with City staff and Consultants. Indicate how the Proposer intends to positively and innovatively work with the City in providing the services outlined in this RFP.

PAGE # 29-32

- 2) Provide a detailed description of the service, including but not limited to:

PAGE # 29-32

- How community outreach and achieving consensus is addressed.
- How assessment methodology and district's budget needs are addressed.
- Experience with similar special assessment districts.
- Ability to meet or exceed all specifications and how the contract fits into proposer's workload.

SUBMITTAL – SECTION IV: PAST PERFORMANCE AND REFERENCES

- 1) Using the required Attachment A - Reference Form, provide a minimum of three (3) references (but no more than five (5) for which Proposer has performed similar scope of services in the last five (5) years. **DO NOT include work/services performed for the City of Coral Gables or City employees as reference (City related experience will be outlined in the request below).**

PAGE # 34-35

- 2) List all contracts for which the Proposer as performed (past and present) as a PRIME for the City of Coral Gables. The City will review all contracts the Proposer has performed for the City. Any and all Proposer's performance records (satisfactory and unsatisfactory) will be utilized in the evaluation process regardless of the type of work performed for the city.

PAGE # 37

- 3) Provide a list with contact information (Name of Agency, contact person, telephone number, email address) of all public sector clients in the last ten (10) years, and include if any, that have discontinued use of Proposer's services within the last two (2) years and indicate the reasons for the same. Additionally, please provide any documentation related to performance issues of the current or past contracts to include any non-performance reports or notices to cure. The list of projects shall include the name of the project, the value, date(s) of project, etc. The City reserves the right to contact any reference or current customer identified as part of the evaluation process.

PAGE # 36-37

- 4) 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 RFP (See Schedule D of Attachment B).

PAGE # 37**SUBMITTAL – SECTION V: 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.

PAGE # 38

SUBMITTAL – SECTION VI: PROPOSAL PRICE PROPOSAL

1) Provide pricing in INFOR for Consulting Services for Special Assessment District Plan. PAGE # 40

-- 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 INFOR.**
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.

PROPOSER'S AFFIDAVIT

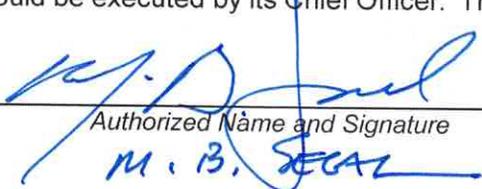
SOLICITATION: RFP 2024- 041 Consulting Services for Special Assessment District Plan

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 CONE 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.

 <hr/> Authorized Name and Signature M. B. SEGAL	PRESIDENT <hr/> Title	1-21-25 <hr/> Date
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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 M. B. SEGAL / OWNER
 (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.

STATE OF Colorado
COUNTY OF Denver

On this 21st day of January, 2025, before me the undersigned Notary Public of
the State of CO, personally appeared Brad M. B. Segal
(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.

Ef Ethan Greene
NOTARY PUBLIC, STATE OF CO

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

NOTARY PUBLIC
SEAL OF OFFICE:

Personally know to me, or Produced
Identification:

Personally known to me
(Type of Identification Produced)

ETHAN GREENE
Notary Public
State of Colorado
Notary ID # 20244029490
My Commission Expires 08-06-2028

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: PROGRESSIVE URBAN MANAGEMENT ASSOCIATES, LLC

Address: 1201 E. COLFAX AVE, DENVER CO 80218
Street City State Zip Code

Telephone No: 303 997-8754 Fax No: () Email: BRAD@PUMAURM.COM

How many years has your company been in business under its present name? 31 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? :

At what address was that company located? :

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

Is your Company Licensed? Yes _____ No If Yes, ATTACH COPY of License

Has your company or its senior officers ever declared bankruptcy?
Yes _____ No 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 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.

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 1-6-25 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

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:

Account currently inactive, can activate if needed for project.

Federal Work Authorization User Identification Number

See above

Date of Authorization

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

Executed on *1-21-25* in *DENVER* (city), *CO* (state).

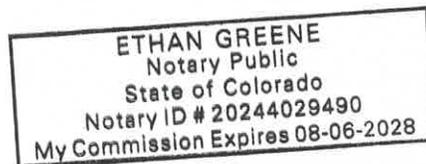
[Signature]
Signature of Authorized Officer or Agent

M.B. Segal, President
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME
ON THIS THE *21st* DAY OF *January*, *2025*.

Ethan Greene
NOTARY PUBLIC

My Commission Expires:
08/06/2028



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

SOLICITATION NAME/NUMBER: CONSULTING SERVICES FOR SPECIAL ASSESSMENT DISTRICT PLAN
2024-041

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: _____
Lobbyist's Firm (if applicable): _____
Phone: _____
E-mail: _____

Name of Lobbyist: _____
Lobbyist's Firm (if applicable): _____
Phone: _____
E-mail: _____

Name of Lobbyist: _____
Lobbyist's Firm (if applicable): _____
Phone: _____
E-mail: _____

Name of Lobbyist: _____
Lobbyist's Firm (if applicable): _____
Phone: _____
E-mail: _____

Authorized Signature: 

Printed Name: M. B. DEANE

Date: 1-21-25

Title: PRESIDENT

Bidder/Proposer Name: PROGRESSIVE URBAN MANAGEMENT ASSOCIATES, INC

CITY OF CORAL GABLES
FINANCE DEPARTMENT/PROCUREMENT DIVISION

LOBBYIST AFFIDAVIT

Solicitation Name/Number: Consulting Services for Special Assessment District Plan # 2024-041

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
Brad Segal	President	Principal-in-Charge	P.u.m.A.
Yvette Freeman	Senior Strategist	Project Support	P.u.m.A.
Daniel Mahela	Senior Vice President	Project manager	P.u.m.A.
Dillon Goodson	Principal	Project Support	Public Sphere Projects
Jennie Kovalcik	Associate	Project support	Public Sphere Projects

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] Title: PRESIDENT

Printed Name: M. B. Segal

Date: 1-21-25

Bidder/Proposer's Name: PROGRESSIVE URBAN MANAGEMENT ASSOCIATES, INC

NOTARY PUBLIC

STATE OF Colorado

COUNTY OF Denver

On this 21 day of January, 2025, before me the undersigned Notary Public of the State of CO, personally

appeared M.B. Segal (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.

[Signature]

NOTARY PUBLIC, STATE OF CO

Ethan Greene

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

SEAL OF OFFICE:

Personally know to me, or Produced

Identification:

Personally known to me

(Type of Identification Produced)



SECTION II: EXPERIENCE & QUALIFICATIONS

Firm Overview

P.U.M.A.

Progressive Urban Management Associates (P.U.M.A) is a real estate economics and planning consultancy offering management, marketing, and financial expertise to advance downtown and community development. Over the past 32 years, we have assisted more than 300 clients in 40 states, Canada, and the Caribbean. P.U.M.A. has eight full-time employees and offices in Denver, CO; Louisville, KY; and San Jose, CA. Additional information is available on our website at <https://pumaworldhq.com>.

Special improvement district formation and renewal for downtowns are specialties of the firm. **We are considered a global leader in place-based assessment districts, and nationally we have helped to establish and/or renew more than 85 special districts that collectively are generating more than \$100 million annually.** With expertise in varied, complex urban markets, below is a sampling of cities in which we have completed district creation, renewal, and strategic planning projects:

- Asheville, NC (BID Formation)
- Atlanta, GA (Downtown BID Operations Assessment; Buckhead CID Formation)
- Chapel Hill, NC (BID Strategic Plan)
- Chattanooga, TN (BID Formation)
- Cherry Creek, Denver, CO (Organizational Alignment, BID Strategic Plan)
- Cleveland, OH (BID Formation and Renewal)
- Denver, CO (DDA expansion, Groundfloor Activation Study)
- Durham, NC (BID Strategic Plan)
- Evansville, IN (BID Formation)
- Grand Rapids, MI (BID Renewal)
- Littleton, CO (DDA formation)
- Miami, FL (Downtown Miami Partnership Strategic Plan)
- Nassau, Bahamas (District Feasibility)
- Norfolk, VA (BID Strategic Plan and Renewal)
- Oklahoma City, OK (BID Formation, BID Renewal, and Strategic Plan)
- Pasadena, CA (BID Renewal, Strategic Plan)
- Reno, NV (BID Formation)

Public Sphere Projects

Public Sphere Projects is a national planning and placemaking consultancy. We advise place managers on the visioning, strategy, and stewardship of shared urban places through an uncompromising commitment to the values of justice and joy. Our work varies in location and scale: from long-term strategic planning to tactical interventions. But it is always in partnership with place managers, city agencies, community leaders, and property owners who steward the public realm — and always in service to community.

Public Sphere Projects brings extensive experience in creative placemaking and place-keeping, activation and programming, public art curation and installation, cultural planning, and pilots and pop-ups. In this body of work, Public Sphere Projects will support P.U.M.A. with the creation of a business plan by providing subject matter expertise in public realm activation, programming, and events.

Local Community Engagement/Public Relations Expertise

In response to the unique circumstances in Coral Gables and the background on this project, if selected, we propose working closely with the City team to identify and sub-contract with a firm located in Coral Gables or a neighboring community that specializes in engagement and public relations for planning processes and/or political campaigns. We believe planning and district formation processes move at the pace of trust, and want to ensure the City is set up for success by lifting up and tapping into local political knowledge and expertise.

Key Personnel

P.U.M.A.

With over 50 years of combined expertise in special district formation, renewal, and strategic planning, P.U.M.A. offers the most experienced team in the place management industry. All three of our team members were former practitioners for special assessment district organizations. Our team members for this project would include:



BRAD SEGAL, president of P.U.M.A brings more than 35 years of experience in the place management and community development field as both a consultant and practitioner. Prior to forming P.U.M.A., he served as the senior director of the Downtown Denver Partnership, one of the nation's premier BIDs with a diversified organizational structure and an annual budget of more than \$10 million. Brad has served four terms on the board of directors of the International Downtown Association. Brad is acknowledged as a global leader and innovator in the place management field, has led workshops in a variety of special district forums, and written publications that guide communities through the district formation process. For this process, Brad will be the **Principal-in-Charge** overseeing all aspects of district formation and planning.



DANIEL MAKELA, LPM, senior vice president with P.U.M.A., brings 11 years of experience in the place management industry as a practitioner and consultant. In his role at P.U.M.A., Daniel has worked on special district formation and renewal processes in Asheville, NC; Chattanooga, TN; Evansville, IN; Reno, NV; and San Jose, CA. Daniel holds a Masters in Community Planning degree from the University of Cincinnati and was formerly a senior project manager for the Louisville Downtown Partnership in Louisville, Kentucky. For the Downtown Coral Gables special district formation process, Daniel will be the **Project Manager**, coordinating project logistics, evaluating real estate dynamics, helping facilitate stakeholder engagement, conducting field evaluations, leading database research necessary for assessment modeling, and driving all aspects of Business Plan creation.



YVETTE FREEMAN, senior strategist at P.U.M.A., brings 20 years of experience in place management as a practitioner and a consultant. Most recently, Yvette was the manager of the special services district in Silver Spring, Maryland, where she directed the day-to-day operations of the downtown district. Prior to her work in Maryland, Yvette was the BID manager for the Downtown Denver Partnership where she supervised the daily operations of the 16th Street Mall. Yvette will support stakeholder engagement and field evaluations, lead development of the base level services framework, and provide creative input on Business Plan components.

Public Sphere Projects

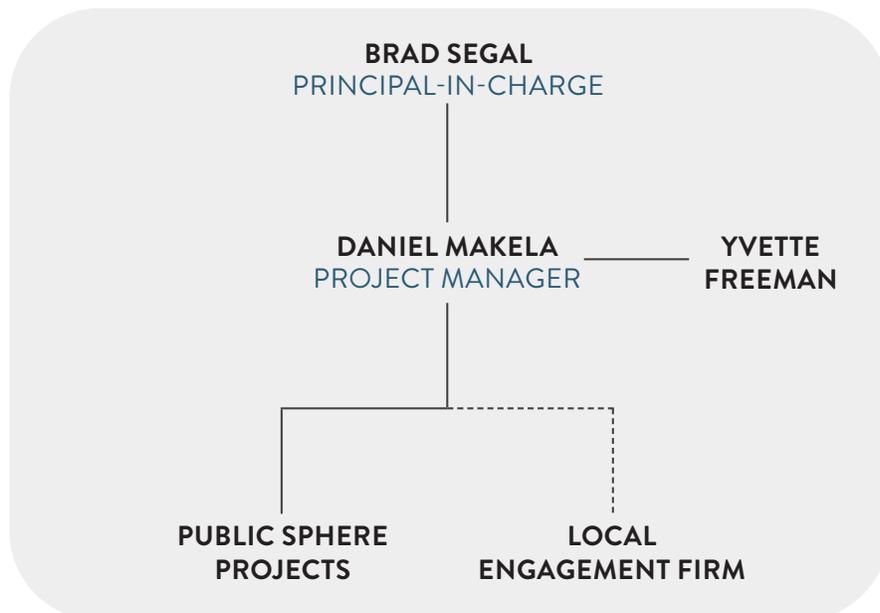


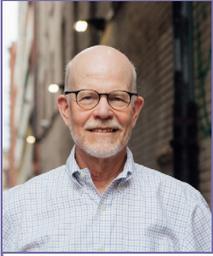
DILLON GOODSON, principal at Public Sphere Projects, is a veteran business district leader and economic development expert who previously served as executive director of one of Chicago’s largest community development organizations. With a background in communications and systems change, he brings more than 15 years of experience developing strategies for urban places. He serves as an editor for multiple publications and bodies of research and co-authors the International Downtown Association’s Value of U.S. Downtowns and Center Cities study. For Downtown Coral Gables special district formation process, Dillon will lead development of detailed public realm activation and programming recommendations in the Business Plan, plus will support community engagement efforts and operations and governance strategy development.



JENNIE KOVALCIK, associate with Public Sphere Projects, brings a decade of experience in business improvement district formation and management. With a deep understanding of experiential program design, she has successfully implemented innovative strategies to drive long-lasting change in the public realm. Jennie excels in communicating complex information to diverse stakeholder groups and fostering connections. For this effort, Jennie will support development of programming and activation strategies and will provide creative input into the Business Plan development process.

Organizational Chart





BRAD SEGAL

President

Real Estate Economics | Strategic Planning | Leadership Facilitation | Public Engagement | Community Development Finance | Equitable Communities

EXPERTISE

Brad Segal, who founded P.U.M.A. in 1993, has more than 30 years of experience in downtown management and community development as both a practitioner and consultant. A self-proclaimed "urban therapist," Brad is one of the nation's leading authorities on downtown trends and issues, reinventing downtown management organizations, forming business improvement districts and pioneering efforts to create healthy communities.

Representative projects include:

- Building consensus and forming business improvement districts in Santa Monica, CA; Cleveland, OH; Oklahoma City, OK; San Antonio, TX; and Grand Junction, CO
- Directing the public process and developing market-based downtown plans in Lincoln, NE; Evansville, IN; Norfolk, VA; Reno, NV; and Greeley, CO
- Creating strategic plans to guide center city public/private partnerships in Colorado Springs, CO; Washington, DC; Pasadena, CA; Newark, NJ; and Nassau, Bahamas
- Designing and implementing community-based economic development strategies for New Haven, CT; Wailuku, HI; Boulder, CO; Milwaukee, WI; and Denver, CO

PAST EXPERIENCE

Senior Director, Downtown Denver Partnership, Inc., Denver, CO, 1987-1993

Designed and managed business development and marketing programs to attract jobs and investment to downtown Denver. Highlights included directing the Lower Downtown Business Support Office, which is credited with helping to revitalize Denver's premier urban historic district, and being part of the management team that re-engineered the Downtown Denver Partnership's operations, structure and organizational culture.

Associate Director, Port Morris Local Development Corporation, South Bronx, NY, 1984-1985

Formed and managed a local development corporation to pursue industrial revitalization and represent 450 businesses.

Housing and Economic Development Coordinator, City of Martinez, CA, 1979-1983

Directed the commercial revitalization of a 10-block Main Street area.

SELECTED RECOGNITION & AFFILIATIONS

Honors:

Awarded the CRE professional designation by Counselors of Real Estate, 2019

International Downtown Association President's Award for sustained leadership and generosity in producing the P.U.M.A.

Global Trends Report, 2014

Recognized by the International Downtown Association for work performed as a volunteer for Historic Denver for formation of the Downtown Denver Historic District, 2001

Named Entrepreneur of the Year for the Rocky Mountain region in the category of Supporter of Entrepreneurship, sponsored by Inc. Magazine, Ernst & Young and Merrill Lynch, 1992

Professional Affiliations:

International Downtown Association, Board Member (1998-2004 and 2010-2016)

Downtown Colorado Inc, Board Member (2000-2009) and President (2007-2008)

All In Denver, Co-Founder and Board Member (2016-present)

Urban Land Institute

Featured Speaker: Frequent workshop presenter and panelist in conferences sponsored by the International Downtown Association, National Main Street Center, American Planning Association, California Downtown Association and Downtown Colorado, Inc.

Lecturer: Teach urban revitalization strategies course at the University of Colorado Denver Graduate School of Architecture and Planning (2012-present)

Expert Witness: Testimony in support of community planning and development approach to congressional redistricting, State of Colorado, October 2011

EDUCATION

Master of Business Administration, Columbia University, NY

Bachelor of Arts in Urban Analysis, University of California at Berkeley

PROGRESSIVE URBAN
MANAGEMENT ASSOCIATES





DANIEL MAKELA, LPM

Senior Vice President

Downtown Planning | Market Research | Data Analysis | BIDs | Graphic Design | Strategic Planning

EXPERTISE

As a senior vice president with P.U.M.A., Daniel is involved in all aspects of the firm's downtown-focused work, including market assessments, master plans, business improvement district formations, and strategic plans. Prior to joining P.U.M.A. in 2015, Daniel worked as a project manager in both the public sector and for a downtown management organization. Daniel is a Certified Leader in Place Management (LPM), as designated by the International Downtown Association.

Representative P.U.M.A. projects include:

- Developing strategic plans to guide downtown management organizations in Atlanta, GA; Durham, NC; Minneapolis, MN; San Jose, CA; and Washington, DC
- Producing market assessments for a diverse range of downtowns, including Durham, NC; Boulder, CO; Lincoln, NE; Rapid City, SD; Milwaukee, WI; and Traverse City, MI
- Crafting assessment models and operating plans for new and existing business improvement districts (BIDs) in Denver, CO; Chattanooga, TN; Grand Rapids, MI; and San Jose, CA
- Forming focused goals, strategies, and actions for downtown and neighborhood master plans, based on broad stakeholder and community input, in Denver, CO; Flagstaff, AZ; and Lincoln, NE

PAST EXPERIENCE

Senior Project Manager, Louisville Downtown Partnership, Louisville, KY, 2015

Worked as a senior member of the planning team. Managed and represented LDP on an array of downtown projects, including the creation of new zoning overlay districts, tactical urbanism events, and a downtown housing strategy.

Project Manager, Mayor's Innovation Team, Louisville, KY, 2012-2015

Worked on a small team dedicated to bringing innovation to local government. Managed various projects designed to improve customer service within the city planning department. Conducted detailed analysis to identify new solutions, set targets for those solutions, and track progress during implementation. Completed advanced project management training.

Economic Development Officer, Economic Development Department, Louisville, KY, 2010-2012

Worked with the City's commercial and industrial redevelopment division on long-range economic development and planning initiatives. Administered a brownfields assessment grant from the U.S. Environmental Protection Agency.

Research Assistant, Economic Center for Education and Research, Cincinnati, OH, 2008-2010

Worked with a research team on various community development projects. Assisted in the production of market assessments, economic cluster analyses, and workforce analyses.

OTHER EXPERIENCE

Bloomberg Fellowship, Research Center for Leadership in Action at the Wagner Graduate School of Public Service, New York University, 2012-2014

Urban Design Career Discovery Program, Graduate School of Design, Harvard University, 2007

PUBLICATIONS AND PRESENTATIONS

"Strategic Planning During (and After) COVID" | International Downtown Association National Conference, 2021

"How to Make Big Changes to your Planning Department" | Ohio-Kentucky-Indiana Regional Planning Conference, 2014

"Innovation in City Government" | Innovation Delivery Public Forums, Louisville, KY and New York, NY, 2013

"Art and Culture: The Transformation of Louisville's East Market District" | University of Cincinnati, OH, 2010

AFFILIATIONS

International Downtown Association | Certified Leader in Place Management (LPM)

Next City Vanguard Member

Urban Land Institute

EDUCATION

Master of Community Planning, University of Cincinnati, OH; AICP Award for top program graduate

Bachelor of Science in Economics, Centre College, Danville, KY (with abroad studies in France, Vietnam, and Cambodia)

PROGRESSIVE URBAN
MANAGEMENT ASSOCIATES





YVETTE J. FREEMAN

Senior Strategist

Community Outreach + Engagement | Business Development | BID Management | Operations

EXPERTISE

Yvette brings more than 25 years of experience in community development and urban district management as a practitioner and consultant. She joined Progressive Urban Management Associates in 2015 and provides facilitation, strategic planning, project management, community outreach, and business support.

Representative P.U.M.A. projects include:

- Conducting outreach to marginalized communities in Denver, CO; Lincoln, NE; Newark, NJ; Norfolk, VA; and Tulsa, OK
- Outreach to businesses and individuals for feedback about the City of Denver's public restrooms pilot program
- Providing project support and creative input to develop a strategic plan for downtown BIDs in Minneapolis, MN; Washington, DC; Oakland, CA; and Cleveland, OH
- Assisting with the formation of a business improvement district for Denver's Historic Five Points commercial strip
- Working with the City of Denver to improve inter-departmental communications and coordination to implement the City's transit oriented development plan
- Evaluating transportation management associations (TMAs) for the City of Denver and providing recommendations to develop greater efficiencies and organizational structure for the program

PAST EXPERIENCE

Operations Manager, Block by Block, Downtown Denver BID, Denver, CO, 2014

Managed nearly 70 "clean and safe ambassadors" for downtown Denver's 24/7/365 BID program; established higher performance standards and enhanced efficiencies.

Chief of Operations, Silver Spring Urban District, Montgomery County, MD, 2008-2014

Managed \$2.8 million budget and 40 union employees; introduced operational strategies and "clean and safe" standards to address Silver Spring's rapid growth and changing demands; partnered with Montgomery County Department of Corrections to establish an award-winning initiative for minor offenders to provide cleaning services in downtown; collaborated with government agencies and property owners to expand Washington DC's bike sharing program.

Operations Manager, Downtown Denver Business Improvement District, Denver, CO, 1994-2000

Managed various contractors and a \$1 million budget; established higher standards of cleanliness for the 16th St. Mall and BID; oversaw the 16th St. Mall vending program; advised property owners; worked collaboratively with the police, and other agencies including those serving the unhoused population, and young people of color; initiated and managed a customized \$500,000 light refurbishment project for the 16th St. Mall; collaborated with property owners, city staff and designers for a \$3 million streetscape improvement project.

Associate Director, Downtown Denver Partnership, Denver, CO, 1989-1994

Co-managed the locally and nationally recognized Business Support Office program to spur economic development in Denver's Five Points and Lower Downtown areas; planned and facilitated business workshops; conducted outreach to 500-plus downtown businesses and coordinated targeted marketing programs.

OTHER EXPERIENCE

Colfax Business Improvement District, Board Member (2018-2020)

All In Denver, Co-Founder and Board Member (2016-2020), a social equity advocacy organization

Chinook Fund, Board and Executive Committee Member (2002-2009), a partnership of activists, donors, and social change organizations promoting social justice and freedom from oppression

Lundy Leadership Challenge (1998-2001), an initiative to enhance leadership capacity in Colorado's LGBTQ community

AFFILIATIONS

International Downtown Association (IDA)

Urban Land Institute (ULI)

Rocky Mountain Land Use Institute (RMLUI)

EDUCATION

Bachelor of Science, Human Development and Family Studies, Colorado State University, Ft. Collins, CO

Certificate in Women's Interdisciplinary Studies, Colorado State University, Ft. Collins, CO

PROGRESSIVE URBAN
MANAGEMENT ASSOCIATES





Dillon Goodson

Principal, strategic planning and change management

Dillon Goodson is a veteran business district leader and economic development expert who previously served as executive director of one of Chicago's largest community development organizations. With a background in communications and systems change, he brings more than 15 years of experience developing strategies for urban places. He serves as an editor for multiple publications and bodies of research and co-authors the International Downtown Association's *Value of U.S. Downtowns and Center Cities* study.

Featured Projects

IGNITE the Region Economic Development Strategy Update; Northwest Indiana
Principal in charge of a regional arts and culture strategic update to a 2018 economic development strategy

Fayetteville, Arkansas Cultural Plan; Fayetteville, Arkansas; Strategist and engagement lead, supporting the city's first-ever cultural plan

Downtown Boston Retail Activation Program; Boston, Massachusetts; Principal in charge and project manager of a novel public realm activation strategy

Hartford Business Improvement District Strategic Audit; Hartford, Connecticut
Principal in charge and strategist responsible for developing a strategic assessment of downtown and corresponding economic development approach

Lakeview Low-Line; Chicago, Illinois; Lead community engagement, design, and programming strategist for a new linear park on Chicago's North Side

Chicago Loop Strategic Action Plan; Chicago, Illinois; Co-author and strategist for a 5-year plan for downtown Chicago

Education

B.A. Communications,
Public Law & Political Thought,
DePaul University, Chicago, IL

Professional Affiliations

International Downtown Association
Board of Directors (former)
Awards Committee Chair (former)

Relevant Prior Employers

Lakeview (Chicago) SSA 27
Executive Director, 2019-2021
Community Development Director,
2015-2019

Chicago Loop Alliance
Marketing Director and Placemaking
Strategist, 2010-2015



Jennie Kovalcik

Associate, project manager and BID advisor

Jennie Kovalcik brings a decade of experience in business improvement district formation and management. With a deep understanding of experiential program design, she has successfully implemented innovative strategies to drive long-lasting change in the public realm. Jennie excels in communicating complex information to diverse stakeholder groups and fostering connections.

Featured Projects

Uplands Regional Arts & Culture Plan; Bloomington, Indiana

Detroit Design District Funding & Activation;
Detroit, Michigan

Boulder Arts & Culture Blueprint; Boulder, Colorado

Downtown Seattle BIA Expansion & Resource Development; Seattle, Washington

Seattle Creative Economy Report; Seattle, Washington

Tacoma BIA Formation; Tacoma, Washington

Portland Enhanced Service District Report & Recommendations; Portland, Oregon

Downtown Rochester BIA Formation; Rochester, New York

Pioneer Square 2025 Neighborhood Master Planning; Seattle, Washington

Education

B.S. Business & Communications,
Grand Valley State University,
Grand Rapids, MI

Professional Affiliations

International Downtown Association
Board of Directors
Awards Committee Member

Relevant Prior Employers

Uncommon Bridges
Project Manager, 2023-present

SBGN for Seattle Office of
Economic Development
Program Manager, Seattle Restored,
2021-2023

Alliance for Pioneer Square
Director of Communications, 2019

Downtown Seattle Association
Senior Specialist, Parks & Public
Spaces, 2017-2019



SECTION III: PROJECT APPROACH & METHODOLOGY

Project Understanding

It is our understanding that the City of Coral Gables is seeking a consultant to facilitate the formation of a dependent Retail Business District (RBD) in Downtown. We understand that there was a Business Improvement District (BID) in Downtown for 25 years, but in response to its dissolution in 2022, the City's Economic Development Department has taken on key projects and initiatives that are beloved by the Coral Gables community. Realizing that there is demand for these services above and beyond what the City is able to provide, the City is now seeking to create a new assessment-based district to make the desired additional services and enhancements financially sustainable in the long-term. Specific project objectives include:

- Assess the dynamics of Downtown Coral Gables' economic, political, and planning environment to understand significant market changes that have occurred over the past five years resulting in the dissolution of the BID, and to anticipate those that can be reasonably expected through the next five years.
- Determine current challenges and opportunities in Downtown.
- Understand service and program priorities for a new improvement district (e.g., events and activation, enhanced maintenance, beautification, marketing, etc.).
- Engage a variety of stakeholders (i.e., property and business owners, civic leaders, community members, etc.) in a participatory process to ensure there is stakeholder support for successful formation of a new assessment district in Downtown Coral Gables.
- Work closely with the City's legal counsel to determine and meet key project milestones and deadlines.
- Develop a detailed, action-oriented business plan reflective of community priorities to guide the special assessment district upon formation.

Proposed Approach

To meet the preceding objectives and respond to the dynamics described in the RFP and pre-proposal meeting, we recommend a three-phased approach to this project, that would include: Phase 1) Feasibility; Phase 2) Plan Development; and Phase 3) Formation. This recommended approach is informed by our extensive experience working in communities with past challenges related to special districts, and is intended to ensure there are adequate market fundamentals and property and business owner support to form a new special district in Downtown Coral Gables before proceeding with subsequent business plan creation and the legal district formation process.

At the end of each phase described in-detail on the following pages, the consultant team, City staff, and district stakeholders will pause and determine the desirability of moving on to the subsequent phase. If selected, we will work closely with the City team and legal counsel to create a detailed, phased project timeline based on key district formation milestones to guide the overall process.

To ensure a smooth process, we recommend that the City of Coral Gables designate a staff **project manager** to work with the consultant team. Tasks for the project manager will include working with the Assessor's Office to compile a comprehensive property database for the district, identifying key Downtown stakeholders to engage in the process, and arranging logistics for stakeholder meetings and site visits.

Additionally, to provide input, direction, an overall "sense of reality," and eventually champion formation of the new district, a **Working Group** comprised of business, property, resident, and civic representatives is recommended to work with the consultant team through the duration of the project. Our goal is that by the end of the district formation process, the Working Group will lead a campaign, supported by the consultant team and City, to create the new district.

Additional detail on our recommended approach is provided below.

Phase 1: Feasibility

- 1.1 District Orientation and Field Work:** The consultant team will gain an initial understanding of Coral Gables' real estate dynamics by reviewing recent plans and market studies. We will undertake a site visit to become acquainted with the district study area, assess recent changes including context around the dissolution of the BID, and understand opportunities for the next five years. We will meet with influential stakeholders and conduct an initial workshop with the Working Group. Field work will help us understand the physical characteristics and conditions in Downtown, giving the consultant team an understanding of services that exist and/or are needed. It will also help further refine the study area boundaries of the new district, if necessary. We anticipate a two- to three-day site visit to become acquainted with Downtown and conduct stakeholder meetings.
- 1.2 Database Refinement:** With assistance from the City, a property owner database will be compiled and refined, including fields for parcel ID, ownership, and property characteristics including classification, building and lot square footage, frontage, and assessed value. The database will be used for initial analysis on assessment methodology options for the prospective district.
- 1.3 Stakeholder Engagement:** Working closely with the City and our local engagement/public relations partner, we will develop a stakeholder outreach plan and communication strategy with the goal of engaging key Downtown constituents in various formats. Engagement will seek to both educate and seek priorities from property owners, businesses, and residents within Downtown. In addition to regular workshops with the Working Group, we anticipate up to eight (8) focus group meetings with key Downtown constituent groups, up to fifteen (15) one-on-one meetings with influential and/or larger property owners, and a widely-distributed online survey to understand the broader community's priorities for Downtown. We will also meet with City officials, departments, and committees to better understand the level of local government and elected official support for a new special district. We will plan for a combination of remote and on-site meetings.
- 1.4 Special District Feasibility Assessment:** Based on the findings from the above three steps, the team will prepare a brief Special District Feasibility Assessment for Downtown Coral Gables. The report will recap our findings from stakeholder engagement, field work, and database analysis. It will provide initial recommendations for refined boundaries (if needed), anticipated services, and a range that assessment methodology options could expect to generate. Lastly, the report would offer our estimation of special district-readiness (e.g., a scale rating). Special district readiness will primarily be based on the following factors:
- *A clear need* – There should be positive response from stakeholders on the concept, and consensus on what services would most benefit the district.
 - *Private sector support and champions* – Private sector leaders must champion the special district concept and be the most visible stakeholders promoting the concept.
 - *Local government/elected official support* – Local government should be in support of the process and willing to offer technical assistance and data, plus consider financial participation in the district.
 - *Real estate economics and pricing* – The special district should be priced to balance two concerns. It needs to raise enough funds to sufficiently capitalize desired programs, yet not be too expensive to cause stress on local real estate and businesses. Hitting this balance is critical to both success in the formation stage, and then success in operations. In certain instances, local real estate economics make this balancing act unachievable.

The Feasibility Assessment will be shared with City staff and the Working Group, and a collective decision will be made on whether or not to move on to Phase 2.

Phase 2: Business Plan Development

2.1 Draft Special District Business Plan: Based upon the stakeholder priorities identified in the preceding steps, the first draft of the Business Plan will be compiled. The plan will be designed as a user-friendly educational tool for property and business owners, plus the broader Downtown community. The Business Plan will include the following components:

- A user-friendly executive summary;
- Background on Coral Gables;
- District rationale and objectives;
- Summary of stakeholder engagement, including priorities for Downtown;
- A vision, mission, and goals for the proposed special district;
- Recommended district boundaries and identification of any benefit zones;
- Governance and service delivery structure, including:
 - Service plan options with first year budget and multi-year projections;
 - Recommended Board structure and logistics;
 - Criteria to track and measure success of the district;
- Organizational structure and staffing recommendations;
- Recommended assessment methodology explanation and list of affected properties;
- Timetable and step-by-step guide for district creation, including self-assessment vote logistics;
- Other issues related to district management and formation.



P.U.M.A.-LED WORKSHOP

The preliminary Business Plan will be forwarded to the Working Group for review in advance of a subsequent Plan review workshop. The Plan will also undergo a review by the City's legal counsel to ensure that it is in compliance with applicable State of Florida and local statutes.

2.2 Base Level of Services: A quantified definition of the City's existing level of services within Downtown and a commitment to maintain a base level of services will begin during the Feasibility phase of the project, and will be formalized concurrently to development of the Business Plan. The consultant team will work closely with the City to provide model base level of services agreements from other cities, assist in negotiations, and participate in the process as requested.

2.3 Plan Review Workshops and Meetings: The consultant team will present the options and recommendations from the preliminary Business Plan to Downtown stakeholders through a series of workshops and meetings with individual property owners. Participants from Phase 1 focus groups and interviews will be encouraged to attend the workshops. The intent of the workshops is to obtain stakeholder input and buy-in prior to finalization of the Business Plan.

Following the Business Plan workshops and meetings, the consultant team will hold a briefing with the City, the Working Group, and other key partners to ensure there is sufficient support for moving forward to special district formation. If we determine there is support to move forward with district formation, we will work closely with the City's legal counsel to formalize key deadlines and develop a work program to ensure those deadlines are successfully met.

Phase 3: Formation

The RFP alludes to a vote of the affected property owners. We would work with City staff and legal counsel to determine the detailed process required for district formation and what this vote entails; and refine the following approach based on that information.

- 3.1 Database Verification/Refinement:** To prepare for the property owner vote, the database will be refined to reflect the finalized boundaries, assessment rates, and year 1 special assessments to be paid by each property. The database would also be expanded to have fields to capture details on property owner support, opposition, etc. to be used during this final phase.
- 3.2 Special District Fact Sheet:** The consultant team will prepare a summary that communicates the parameters and benefits of the RBD in a concise 1-to-2-page format.
- 3.3 “Campaign” Coaching:** The consultant team will monitor and provide assistance to the City and Working Group during the formation phase and City Commission approval process. These meetings will include tracking support, making “sales” assignments for property owners, and developing strategies for approval of the district.
- 3.4 City Commission Approval:** Upon the completion of the above, the consultant team can be available to participate in public hearings establishing the district.

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SECTION IV: PAST PERFORMANCE & REFERENCES



The City of Coral Gables
Procurement Division
2800 S.W. 72ND AVENUE
MIAMI, FLORIDA 33155

CITY OF CORAL GABLES REFERENCE FORM
RFP No. 2024-041 Consulting Services for Special Assessment District Plan

Complete the form as indicated below, to provide the required information as outlined in Section 3 of the solicitation. The City shall contact the companies listed below to verify the work performed on behalf of your company. All fields must be completed.

Reference # 1 must cover the minimum five (5) year period from the issuance date of this solicitation.

1. Project Name/Location Ashville, NC BID Feasibility + Formation
 Owner Name Ashville Chamber of Commerce / City of Ashville
 Contact Person Ben Woody
 Contact Telephone No. 828-793-0148
 Email Address: bwoody@ashvillenc.gov
 Yearly Budget/Cost \$ 150,000 / \$ 125,000
 Dates of Contract From: 6/23 To: 6/24
 Project Description P.V.M.A facilitated a feasibility study and subsequent formation of a BID in Downtown Ashville.

Additional References must cover similar engagements satisfactorily performed in the last five (5) years.

2. Project Name/Location Littleton, CO DDA Formation
 Owner Name City of Littleton
 Contact Person Kathleen Osher
 Contact Telephone No. 303-795-3755
 Email Address: kosher@littletongov.org
 Yearly Budget/Cost \$ 150,000 / \$ 150,000
 Dates of Contract From: 1/23 To: 11/23
 Project Description P.V.M.A facilitated the effort to determine the feasibility for and eventual formation of the Littleton Downtown Development Authority (DDA)



The City of Coral Gables
Procurement Division
2800 S.W. 72ND AVENUE
MIAMI, FLORIDA 33155

3. Project Name/Location Tulsa, OK Downtown Management Org. Strategic Plan
 Owner Name City of Tulsa/Tulsa Downtown Coordinating Council
 Contact Person Brian Kurtz
 Contact Telephone No. 918-576-5095
 Email Address: bkurtz@cityoftulsa.org
 Yearly Budget/Cost \$100,000 / \$100,000
 Dates of Contract From: 6/19 To: 6/20
 Project Description P.U.M.A. was retained by the City of Tulsa to develop a strategic plan for a new Downtown Management Organization to oversee the BID.

4. Project Name/Location Bethesda, MD Urban Partnership Strategic Plan
 Owner Name Bethesda Urban Partnership (BUP)
 Contact Person Jeff Burton
 Contact Telephone No. 301-215-6660 ext. 123
 Email Address: jburton@bethesda.org
 Yearly Budget/Cost \$50,000 / \$50,000
 Dates of Contract From: 3/23 To: 9/23
 Project Description P.U.M.A. worked with BUP, a quasi-governmental organization, to create five-year strategic plan to guide programs and priorities.

5. Project Name/Location _____
 Owner Name _____
 Contact Person _____
 Contact Telephone No. _____
 Email Address: _____

Past Clients List

The following is a list with contact information of all public sector clients in the last ten years. None have discontinued use of PUMA services within the last two years.

Past Two Years

- City of Denver; Expansion of Downtown Development Authority,
Contact: David Gaspers, david.gaspers@denvergov.org
- City of Lafayette; Colorado, Creation of Downtown Development Authority,
Contact: Brigid Keating, Brigid.Keating@lafayetteco.gov
- City of Albuquerque; Creation of Downtown Business Improvement District,
Contact: Jennifer Jackson, jjackson@cabq.gov
- City of Aurora, Colorado; Community Development Plan,
Contact: Andrea Amonick, aamonick@auroragov.org
- Bethesda Urban District. MD; Strategic Plan for Improvement District;
Contact: Jeff Burton, JBurton@bethesda.org
- Town of Parker; Parker's Economic Playbook: Moving Parker Towards a Thriving Economic Future & Creation of Downtown Business Improvement District;
Contact: Weldy Feazell Feazell, wfeazell@parkeronline.org
- Colfax Business Improvement District, Denver, CO; Organizational Strategic Plan;
Contact: Frank Locantore, frank@colfaxave.com
- City of Denver; Near Northwest Neighborhood Plan;
Contact: Sung Han, Sungwon.Han@denvergov.org
- City of Littleton, CO; Formation of Downtown Development Authority;
Contact: Kathleen Osher, kosher@littletongov.org
- City of Norfolk, NE; Downtown BID Feasibility;
Contact: Candice Alder, CAlder@norfolkne.gov
- City of Wheat Ridge, CO; Citywide Economic Development Plan;
Contact: Steve Art, sart@ci.wheatridge.co.us

Prior Clients – References Available Upon Request

- City of Flint Downtown Development Authority; Downtown Strategic Planning
- City of Long Beach; North Pine Avenue Community Vision & Action Plan
- Montezuma County; Montezuma Regional Community Roadmap Plan
- City of Greeley & Greeley DDA; Downtown 2032 - The Path Forward: Greeley, Colorado Downtown Plan Update
- City of Tulsa; Our Legacy, Our Community: a renewed vision for North Tulsa
- City of Springfield; Commercial Street Plan
- City of La Junta; Economic Development Action Plan
- City of Lakewood; West Colfax Pedestrian Safety Project Implementation Plan
- City and County of Denver - Denver Parks & Recreation; Sunken Gardens Park Master Plan
- City and County of Broomfield, Economic Development; Advance Broomfield: A Community & Economic Analysis Study for the City and County of Broomfield, CO

- City and County of Denver, CPD; East Central and East Neighborhood Area Plans
- Elbert County; Elbert County Economic Development & Recovery Research
- City of Englewood; Englewood Downtown Plan
- City of Tulsa; Strategic Plan for a Downtown Tulsa Management Organization
- City of Long Beach; Bixby Knolls Business Improvement Association Strategic Plan
- District 2 City Council Office and City and County of Denver; South Sheridan Site Market Assessment
- City of Boulder; Downtown Boulder Retail/Vibrancy Study
- City of Denver; City of Denver Public Restrooms Pilot Project
- City of Lincoln; Center of Opportunity: Downtown Lincoln Master Plan
- City of Littleton; Mineral Station Area Framework
- Town of Mead; Town of Mead Comprehensive Plan
- City of Santa Monica; Santa Monica Pier Working Paper: Strategic Management Plan and Improvement District Feasibility
- City of Fort Collins; The 2017 Fort Collins Downtown Plan
- City of Leadville; Tabor Opera House Feasibility Study
- Town of Parker; Partnering for Parker's Progress P3 Strategic Plan
- City of Reno; Downtown Reno Business Improvement District
- City of Reno; Downtown Action Plan
- County of Maui; Wailuku Civic Hub Programming Feasibility Study
- City of Evansville; Evansville Downtown Master Plan Update
- Prowers County; Prowers County Economic Prosperity Plan
- City of Rapid City and Rapid City Business Improvement District; Rapid City Downtown Area Master Plan

P.U.M.A. has not completed prior work with the City of Coral Gables.

P.U.M.A. has not had incident within the last five (5) years where a civil, criminal, administrative, other similar proceeding was filed or is pending.

SECTION V: AGREEMENT COMMENTS/EXCEPTIONS

None included/not applicable

SECTION VI: PRICE PROPOSAL

Price Proposal

Note: Our price proposal has also been submitted in INFOR per RFP instructions.

TASK	Segal		Freeman		Makela		PSP	TOTAL
	Hours	Rate	Hours	Rate	Hours	Rate		
Phase 1: Feasibility								
Orientation & Field Work	25	235	25	175	25	160	10,000	24,250
Database Refinement					25	160		4,000
Stakeholder Engagement	30	235	30	175	30	160	5,000	22,100
Feasibility Assessment	15	235	10	175	35	160		10,875
Sub-Total: Phase 1	70	235	65	175	115	160	15,000	61,225
Phase 2: Business Plan Development								
Draft Business Plan	25	235	10	175	50	160	5,000	20,625
Base Level of Services			15	175	5	160		3,425
Plan Review Meetings	35	235	15	175	35	160		16,450
Sub-Total: Phase 2	60	235	40	175	90	160	5,000	40,500
Phase 3: Formation								
Database Verification/ Refinement					25	160		4,000
Fact Sheet					15	160		2,400
Campaign Coaching	10	235	20	175	20	160		9,050
City Commission Approval								<i>hourly rates</i>
Sub-Total: Phase 3	10	235	20	175	60	160	0	15,450
TOTAL FEES - ALL PHASES	140	235	125	175	265	160	20,000	117,175
<i>Plus: Travel (at cost)</i>								<i>10,000</i>
<i>Plus: Local Engagement/PR firm (reserve)</i>								<i>20,000</i>

RFP NO. 2024-041
CONSULTING SERVICES FOR SPECIAL ASSESSMENT DISTRICT PLAN

SUBMITTED TO: CITY OF CORAL GABLES

SUBMITTED BY: **PROGRESSIVE URBAN MANAGEMENT ASSOCIATES**

1201 E. COLFAX AVE., SUITE 201
DENVER, CO 80218
720.668.9991

CONTACT: BRAD SEGAL
BRAD@PUMAWORLDDHQ.COM

JANUARY 23, 2025

