

RFP # FY 2011-2012-017
COMPLIANCE MANAGER
SMALL BUSINESS ENTERPRISE,
COMMUNITY BENEFIT PLAN AND
LOCAL VENDOR PREFERENCE

Pamela A. Adams,
President

Project Lead Consultant and Manager



ADAMS CONSULTING GROUP, INC.
545 North Andrews Avenue
Suite 207
Fort Lauderdale, FL 33301
954-764-8500
954-337-0209
6/1/2012

Table of Contents

Transmittal Letter..... 2-3

General Requirements..... 4-5

Professional Licenses and Certifications..... 5

Firm Qualifications and Experience 5

Team Profile..... 5

Current Project List 6

Conflicts of Interest..... 6

Legal Claims 6

Team’s Experience/Qualifications 7

List of Personnel 7

Project Manager’s Experience 8-9

Past Performance/References.....10

Approach to Scope of Work.....11

Financial Resources.....12

Cost Proposal..... 12

Performance Measures 12

Exhibit A --SBE Certification.....14-16

Exhibit B-- Team Resumes.....18-24

Exhibit C---Cost Proposal Form.....26-32

 Cost Proposal Form.....26-27

 Cost Proposal Form Sheet 28-30

 Proposal Variances31

 Proposal Submission Verification Form.....32

Exhibit D--Reports.....34-36



May 31, 2012

Andrea Lues
General Services/Purchasing Director
City of Hallandale Beach
400 South Federal Highway
Hallandale Beach, FL 33009

RE: REQUEST FOR PROPOSAL (RFP) # FY 2011-2012-017
COMPLIANCE MANAGER SERVICES SMALL BUSINESS ENTERPRISE (SBE), COMMUNITY
BENEFIT PLAN AND LOCAL VENDOR PREFERENCE FOR VARIOUS PROJECTS (RFP)

Dear Ms. Lues;

Adams Consulting Group, Inc. is a SBE/CBE/AAACBE certified under the Broward County Small Business Enterprise program, pursuant to Chapter 20, Article XIV, and Code of Metropolitan Broward County. ACG was formed in 2000 and is located in the City of Fort Lauderdale. ACG is certified in Broward County SBE program, CBE/AAACBE and WMBE and is prepared deliver the services in the RFP referenced above.

ACG and the team have reviewed the RFP carefully, understand the scope of work described and is committed to perform the work within through the term of the initial contract September 30, 2017. All of the minimum qualification requirements have been clearly stated and all requested information has been included in this response.

As required ACG representatives attended the mandatory pre-bid conference on May 17, 2012. We also confirmed on May 29, 2012, that there is no addendum to this RFP.

The ACG is best suited to perform the work based on more than 60 years combined of experience developing and managing SBE/CBE programs, economic development and training and outreach and operations and project management. ACG will manage the team through every aspect of the project development and implementation. Norman E. Taylor & Associates, LLC, (NETA), brings the economic development, SBE/CBE program development experience. Thompson Creative Collective (TC2), led by Davicka Thompson is skilled in implementing and managing SBE compliance programs at government enterprises, Fidelity Financial Services, LLC, (FFS), brings formal management review, financial analysis and accounting services.



RFP # FY2011-2012-017

Page 2-

The ACG team confirms submission of this proposal subject to negotiations is a firm and irrevocable offer until such time as City Commission awards a contract as a result of this RFP.

The person authorized to make representation for the Proposer is ACG President, Pamela Adams, President, Post Office Box 1697, Fort Lauderdale, FL 33301(mailing address) the 545 North Andrews Avenue, Suite 207, Fort Lauderdale, FL 33301 (physical address), telephone number 954-764-8500 and e-mail address padams@adamsconsulting.biz

Respectfully submitted,

A handwritten signature in black ink that reads "Pamela Adams". The signature is written in a cursive, flowing style.

Pamela A. Adams, President

5. General Requirements

ACG proposes to offer the following services in response to RFP 2011-2012-017 City of Hallandale Beach Compliance Manager, Small Business Enterprise, Community Benefit Plan and Local Vendor Preference. ACG and the team acknowledge that it has read, understands and will comply with Section XIII. Technical Specifications on pages 21 through 23 in the RFP; we have chosen to present these responsibilities in the three sub programs: Compliance, Small Business Enterprise, Community Benefit Plan and Local Vendor Preference.

COMPLIANCE MANAGEMENT

- Review contractor submittals including but not limited to certified payrolls and statements of compliance.
- Monitor vendor payments to contractor invoices and conduct prompt payment review.
- Provide a proactive program of contractor engagement related to Small Business enterprise (SBE) compliance.
- Review and monitor utilization reports and invoices to ensure compliance to stipulations of each project contract.
- Provide City with monthly and quarterly reports of utilization and fiscal compliance.
- Assist City in developing a “policy and procedures” manual to include compliance, non-compliance, and reporting requirements.

SMALL BUSINESS ENTERPRISE

- Review and monitor contractor submittals and invoices to ensure that established goals are being achieved.
- Coordinate “Business 2 Business” workshops between contractors and local vendors to assist contractors in meeting solicitation goals, building capacity for local vendors and encourage the use of good business practices.
- Provide technical assistance to contractors and local vendors responding to solicitations/bids/RFP's to build capacity with SBE vendors.
- Serve as liaison to contractors and subcontractors/local vendors to build effective working relationships.
- Assist the City in selecting a software system that will interface with finance and procurement operations.
- Monitor use and effectiveness of SBE program.

COMMUNITY BENEFIT PLAN and LOCAL VENDOR PREFERENCE

- Monitor and track the alignment of local vendors to contracts awarded.
- Develop meaningful reports that will assess the level of program goals being met.
- Assist the City in establishing a web-based vendor directory that can be utilized by contractors to identify local vendors.
 - Maintain and a manage data base of SBE vendors including certificates.
- Prepare quarterly economic impact analyses to measure the economic benefits.

- Assist contractors and sub-contractors in identifying mutually beneficial teaming/matching opportunities.
- Provide technical assistance to the contractor, subcontractors and City staff, including SBE training and participate in pre-bid meetings.
- Assist the City in re-engineering interfaces between procurement, internal agencies and the SBE program
- Provide grievance resolution assistance as appropriate to ensure the integrity and success of the City's SBE Program.
- Develop and implement a localized SBE outreach and training programs. (ACG recognizes that the "Disadvantages" Business Enterprise Program is a federally designed program for USDOT funded recipients, and is governed by 49 CFR 23, and therefore is applicable to the City's intended projects) outreach and training programs.

6. Professional Licenses and Certifications

There are no required licenses or certifications required to perform the required services. All business licenses and SBE/CBE certifications are in place and current.
(Exhibit A)

7. Firm Qualifications and Experience

a. ACG has assembled a team of the most qualified and experienced professionals to provide the services required to implement management and monitor a Small Business Enterprise (SBE), Community Benefit Plan and Local Vendor Preference program. Combined the team members have more than 60 years of demonstrative skills and experiences required to perform the full scope of services in the RFP.

b. The demonstrated qualifications and experience of the team include:

1. Quality assurance program implementation
2. SBE,CBE program development, implementation
3. Program management and compliance monitoring
4. SBE/CBE program policy development
5. Training and meeting facilitation
6. Management of SBE/CBE Program Operations
7. Finance, Audit and Accounting Services

c. ACG anticipates two full time employees and three part time consultants will be assigned to the City of Hallandale Beach Project.

d. Below is a current list of government and private clients the team members has under contract through 2017, however the list is subject to change based on new projects which are currently under review. You will note in column 2, the firm initials and the number of team members assigned to each project. Adams Consulting Group, Inc. (ACG); Thompson Creative Collective (TC2);

Project Name (1)	# Staff (2)	Scope of Work (3)	Project Cost	Date (5)	Client Contact (6)
FDOT/City of Fort Pierce Port Collaborative Opportunities Analysis	S/2	Develop and execute a public outreach and information program, identification of stakeholders, conduct interviews with key stakeholders, facilitate focus groups and make public presentations to community groups, assist with the development of informational material.	N/A	2011-Present	Lori Baer, AECOM 13450 W. Sunrise Boulevard, Suite 200 Sunrise, FL 33323 954-745-7200
City of Miramar-Historic Miramar Infrastructure Improvement Program-Phase 2 HMI12	ACG/3	Community & public information, outreach, conflict resolution. Development and distribution of presentations, and collateral materials Attend community meetings to provide project updates.	\$4.1 M	2010-2012	Scott c. Lee, Principal Engineer, AECOM 320 East South Street Orlando, FL 32801 407-513-8268
City of Dallas Water Utilities Public Water Conservation Project	TC2	Community Awareness and Community and Involvement Program Development	\$3.5 M	2009-2013	Glennis Nelson Camp, Dresser & McKee, Dallas, Texas 214-789-1501
City of Miramar-Miramar Parkway Gateway Streetscape Beautification Project	ACG/2	Develop, coordinate and implement a public outreach and engagement program for the business community to facilitate the City's Streetscape Improvement Program.	\$4.4M	2006-Present	Alexander Shershevsky, Project Manager
Broward Barron/Fort Lauderdale CRA Konover Site Redevelopment (I-95 @ Broward Blvd.)	ACG/2	Provided government and community relations consulting services for redevelopment project. Developed and coordinated stakeholder and community outreach strategies and initiatives to build consensus for developer and site concept. Developed WMBE Program and Reporting Program.	\$200 M	2002-Present	Charles B. Ladd, Broward Barron 2900 North University Drive Coral Springs, FL 33064 954-344-7600
Broward County School Board- Municipal Financing and Financial Consulting. City of Miramar Municipal Financing Financial Consulting	FFSLC/3	FFS,LC, has considerable experience reviewing construction contracts and invoices. Reviews included verification sums to be paid to subcontractor, retainage to be withheld, amount paid to date, contract balances, amounts and percentages paid to SBE firms. Reviewed utilization report for project compliance.	N/A	1988-Present	Henry Robinson, Treasurer 754-321-0581 Vernon Hargray , Assistant City Manager 954) 218-4331

e. There are no potential conflicts of interests. The team has been vetted and has no known potential conflicts of interest between the City and any of their clients that may affect the firm's representation of the City's interests.

f. Neither the firm, ACG nor any of the other team members, Thompson Creative Collective (Davicka Thompson), Norman E. Taylor, & Associates, LLC (Norman E. Taylor) or Fidelity Financial Services, LLC (Frank Hall Jr., CPA.); have ever had any legal claims alleging error and/or omissions, or any breach in professional ethics.

8. Team's Experience/Qualification

What follows is a list of the personnel who will be assigned to the City of Hallandale Beach Small Business Enterprise (SBE) Compliance, Community Benefits Plan Program. The resume of each of the respective team members follows. However the ACG/SBE Program Specialist and will be hired when ACG has been selected as the Consultant to provide the SBE Compliance Monitoring Services.

The following table represents a list of the known personnel that will be assigned to this project, their role, education and years of experience in their respective area. As previously stated when ACG is awarded the consultancy, the additional personnel will be hired.

Personnel & Education	Role	Years of Experience
Pamela Adams, B.S., MPA	Key Contract Manager, operations and project management, training, government relations and community relations, business development.	30
Davicka Thompson, B.A.	SBE/CBE Program management including, compliance monitoring, business to business interface, community and public relations, marketing, and event planning	12
Norman E. Taylor, B.A., MPA	Economic and Business development, business sustainability, SBE/CBE/WMBE policy Program policy, governance and organizational development.	30
Frank Hall, Jr. B.S. CPA	Financial management, controls, accounting and audit.	35

Please see Exhibit B for a complete resume of each team members Experience/Qualification including education, specific and relevant experience to this Project.

Pamela Adams, the ACG principal has been designated as the lead consultant on this Project. Ms. Adams has over 30 years of experience in executive, senior and management roles. She has a full understanding of the process of managing the relationship between the consultants and the City, and is well versed in governmental relations and business development.

Davicka Thompson has been designated as the person within the team who will be assigned to the City in the role of day to day Project Manager. Ms. Thompson has 12 years of the requisite experience to assume this role.

9. Lead Consultant and Project Manager Relevant Experience



Education

Masters of Public Administration
Pennsylvania State University, State College, PA (1973)

B.S., Sociology
Political Science,

Western Michigan University,
Kalamazoo, MI(1971)

Total Years of Experience
30

Affiliations

Broward Workshop
Leadership Florida
FTL-MBA

Pamela A. Adams

• Public Outreach & Engagement • Government Relations • Strategic Planning • Meeting Facilitation • Project Management

Relevant Project Experience

Pamela Adams is the President and founder of Adams Consulting Group (ACG). ACG is a full service public outreach and engagement consulting firm, specializing in the design and execution of public engagement and involvement strategies and programs for large impactful public transportation, planning, neighborhood revitalization, and quality of life infrastructure improvement projects. Also included in the scope of services provided are business development, government and community relations and project management.

Over the past ten years Pamela has garnered a reputation of delivering effective, sustained public engagement, information and participation programs and diversity programs. The City of Miramar, Fort Lauderdale Downtown Development Authority, City of Fort Lauderdale CRA, Fort Lauderdale/Hollywood International Airport and the Broward Metropolitan Planning Organization are a few of the clients who have retained the services of ACG to design public participation, outreach, information and engagement programs. These programs are designed to facilitate community input and build consensus and understanding for client's programs.

Pamela has extensive experience designing unique programs to include diverse stakeholder communities and target clusters for each project. She brings valuable local knowledge and relationships to each engagement. She works as an integral part of the project team from the onset to ensure the nuances of public engagement are included in every phase.

The ACG approach is to foster mutual understanding and respect between the community stakeholders and project clients to result in consensus for infrastructure improvement and quality of life projects, programs or initiatives.

Work History

ADAMS CONSULTING GROUP, INC.	12/2000 to Present
HIP HEALTH PLAN OF FLORIDA	01/1993 to 12/2000
HIP HEALTH PLAN OF NEW YORK	09/1982 to 01/1993
CITY OF NEW YORK/DSS/HUMAN RESOURCES ADMINISTRATION	08/1978 to 04/1980
STATE OF MASSACHUSETTS DEPARTMENT OF SOCIAL SERVICES	07/1976 to 07/1978
TOWN OF WELLESLEY	09/1973 to 07/1976

Pamela Anita Adams

1

ADAMS
CONSULTING GROUP, INC.

9. Day to Day Project Managers Relevant Experience



Davicka N. Thompson

davicka@thompsoncreativecollective.com
Mobile: 954-232-1919
Based in Miami, Florida and Dallas, Texas

RELEVANT EXPERIENCE

Thompson Creative Collective June 2011 - present

Service clients include:
Carolina Herrera, Macy's, Simon Corporation, Bitner Goodman, The British Virgin Islands, The City of Dallas

K Strategies Group LLC Public Affairs Consultant August 2009 - June 2011

Education

Bachelors of Science,
Psychology, Nova Southeastern
University, Davie, Florida

Affiliations

Junior League of Dallas, Member

Rotary Club of Frisco, Youth
Programs Chair

Frisco Arts Association, Board of
Directors

Public Relations Society of
America - Dallas Chapter, Board
Member

Nominated for Women's
Business Enterprise (WBE)
Advocate of the Year 2011-
Women's Business Council -
Southwest

Service Clients: Southwest Airlines, the City of Dallas, Dallas/Fort Worth Airport, Dallas Love Field Airport, Pearson

Love Field Modernization Program (LFMP)

Directly responsible for all public relations, marketing and communications activities for the \$519 million project; Tasks include: develop strategies to align brand recognition through public relations, media relations, marketing and events; oversee implementation of the comprehensive Minority, Women and Disadvantaged Business Enterprise (M/W/DBE) program; plan and execute all events with regards to the program, including groundbreaking, outreach and media events on behalf of the City of Dallas and Southwest Airlines; develop and continue to implement program communications plan; proactively manage relationships with key media to communicate program status; lead team in developing program crisis communications plan; Work extensively with key community stakeholders, chambers of commerce and supplier diversity organizations to increase opportunities for M/W/DBE firms; and manage and create content for project website, production of quarterly newsletter and other marketing tools.

City of Dallas' Water Conservation Public Awareness and Advertising Campaign

Direct efforts to build awareness, educate and inform the community about the benefits of water conservation. Responsibilities include: creating presentations for the Dallas Water Utilities' (DWU) director; oversee coordination of community outreach events; manage advertising and social media campaigns; and managing relationships with community organizations. Current projects include create, develop and implement citywide youth summer corps program for Summer 2011 launch.

City of Dallas' Grease Abatement Public Awareness and Advertising Campaign

Direct efforts to engage and educate residents about the Coase the Grease (CtG) campaign: the proper disposal of fats, oils and grease.

10. Past Performance (References)

Team Member	Project	Reference
Pamela Adams, ACG	South Florida Water Management District	<p>Tammy Moore Broward Service Center 8751 West Broward Boulevard Suite 500 Plantation, FL 33324 (954) 713-3200 (Ext: 4983)</p>
Pamela Adams, ACG	AECOM- Miramar Infrastructure Improvement Program	<p>Scott E. Lee, Project Manager AECOM 320 East South Street Orlando, Florida 32801 (407) 513-8268</p>
Davicka Thompson, Thompson Creative Collective	Dallas Love Field Modernization Program – M/WBE Program Outreach & Public Relations	<p>Lyndsey Johnson, K Strategies Group, 214-906-3003</p>
Davicka Thompson	<p>Water Conservation Youth Program Development, Social Media Engagement, Media Relations, Summer Program Development, Public Outreach, Special Events</p> <p>Grease Abatement Youth Program Development, Social Media Engagement, Recycling and Collection Public, Awareness Campaigns</p>	<p>Glennis Nelson, Camp, Dresser & McKee, Dallas, Texas 214-789-1501</p>
Frank Hall, Jr., CPA, Fidelity Financial Services, LLC	<p>FFSLC, has considerable experience reviewing construction contracts and invoices. Reviews included verification sums to be paid to sub-contractor, retainage to be withheld, amount paid to date, contract balances, amounts and percentages paid to SBE firms. Reviewed utilization report for project compliance.</p>	<p>Vernon Hargray , Assistant City Manager 954) 218-4331</p> <p>Henry Robinson, Broward County School Board 7720 West Oakland Park Blvd. 600 SE Third Avenue, Sunrise, FL 33351 754-321-0581</p>

11. APPROACH TO SCOPE OF PROJECT

The consultants approach to this project is described in three phases. This approach is designed to build a platform for a successful, effective and sustainable SBE program for the City of Hallandale Beach. ACG proposes to establish a "Program Leadership Team" to include the City and ACG key Team members

Phase I –Program Development

1. Formalize the policy and goals for the City of Hallandale Beach SBE Program.
2. Develop a policy and procedure manual and reference guide for SBE implementation of the City's SBE program.
3. Deliver applications, systems and process assessment and re-engineering, project management, contract compliance, operational reviews, and periodic reports.
4. Develop and deliver technology-based training materials and programs.
5. Provide consulting services related to government compliance and implementation of automated solutions to meet contract and procurement compliance requirements.
6. Develop performance benchmarks and a quality assurance programs.

Phase II- Program Implementation

1. Provide training to Contractors, SBE's, and City staff on the implementation of the City's SBE Program.
2. Coordinate the submission of required SBE forms, reports, etc.
3. Develop of outreach plans and strategies for "Business 2 Business" matchmaking.
4. Obtain and review certification information from SBE subcontractors participating in designated City projects.
5. Conduct Quarterly SBE Business 2 Business events.

Phase III – Program Operations, Monitoring, Reporting and Evaluation

1. Program Operations
 - o ACG Project Manager will manage the day to day implementation contract services.
 - o ACG SBE Program Specialist will coordinate program administration operations, such as meeting, report collections, etc.
 - o Program Leadership Team will meet routinely to address project implementation and policy issues for the efficient management and coordination of the City's SBE Program.
2. Program Compliance Monitoring
 - o Review solicitations and the contracts awarded, as necessary to ensure program success.
 - o Review SBE utilization reports.
 - o Review invoices related to contracts awarded under the City's SBE Program and identified on the utilization reports.
 - o Produce monthly Program Utilization and Compliance Reporting.

12. FINANCIAL RESOURCES

Adams Consulting Group, Inc. (ACG) has the financial stability and resources to complete a project of this scope. ACG is not now nor has it or its Principal ever declared bankruptcy.

ACG has never been involved in any litigation nor has any other member of the team including, Davicka Thompson, Norman Taylor or Fidelity Financial Services LLC, Frank Hall Jr., licensed CPA.

When awarded this contract ACG will submit a copy of the 2011 Balance Sheet, Income Statement and Statement of Cash Flow, this information is propriety and is not included in this response. ACG has the financial wherewithal to support this project's implementation.

ACG is not contemplating any change or ownership of control.

13. Cost Proposal

ACG has submitted RFP **Section XV. Cost Proposal Form** on pages 25-30 as Exhibit C; each page is labeled with the correlates with page from the RFP document.

14. Performance Measures

Performance measures will be forthcoming as a result of a collaborative process between the Consultant the City. An example of performance measures from other projects and programs could include reports that include:

1. Number of contractors determined to be in compliance during the reporting period.
2. Number of SBE/local vendors and preferred vendors aligned with contractors on projects.
3. Number of contractor audits completed.
4. Number of SBE Workshops
5. Timely submission of monthly reports

The consultant will provide routine reports to the City that aligns with these performance measures. (Exhibit D)

EXHIBIT A
SBE CERTIFICATIONS



OFFICE OF ECONOMIC AND SMALL BUSINESS DEVELOPMENT

Governmental Center Annex
115 S. Andrews Avenue, Room A680 • Fort Lauderdale, Florida 33301
954-357-6400 • FAX 954-357-5674 • TTY 954-357-5664

April 3, 2012

Ms. Pamela Adams
ADAMS CONSULTING GROUP, INC.
PO Box 1697
Fort Lauderdale, Florida 33302

ANNIVERSARY DATE – Annually, on March 5th

Dear Ms. Adams:

Broward County is pleased to announce that your firm has renewed its certification as a **Disadvantaged Business Enterprise [DBE]** in Florida, under a **Unified Certification Program [UCP]** in accordance with 49 CFR, PART 26.

DBE certification is continuing from your anniversary date, but is contingent upon the firm renewing its eligibility annually through this office. You will be notified in advance of your obligation to continue eligibility in a timely fashion. However, the responsibility to assure continued certification is yours. Failure to continue your eligibility will result in immediate action to decertify the firm.

As long as the firm is listed in the DBE Directory it is considered DBE Certified by all Florida UCP Members.

DBE Certification is subject to actions by governmental agencies impacting the disadvantaged status of the firm.

Your firm will be listed in Florida's **UCP DBE Directory** which can be accessed via the internet, at <https://www3.dot.state.fl.us/EqualOpportunityOffice/BizNet/mainmenu.asp> or through FDOT's website at www.dot.state.fl.us/equalopportunityoffice and by "clicking" on "BizNet DBE UCP Directory" in the center of the page

DBE certification is **NOT** a guarantee of work, but enables the firm to compete for, and perform, contract work on all USDOT Federal Aid (FAA, FTA and FHWA) projects in Florida as a DBE and ACDBE contractor, sub-contractor, consultant, and sub-consultant or material supplier.

Broward County Board of County Commissioners
Sue Gunzburgner • Dale V.C. Holmes • Kristin Jacobs • Chip LaBarta • Rose L. Lerman • Stacy Ritter • John E. Rodstrom, Jr. • Barbara Sharief • Lisa
Ward
www.broward.org

Re: Adams Consulting Group, Inc.

April 3, 2012

If, at any time, there is a material change in the firm, including, but not limited to, ownership, officers, Directors, scope of work being performed, daily operations, affiliations with other businesses or individuals or physical location of the firm, you must notify this office, in writing, without delay. Notification should include supporting documentation. You will receive timely instructions from this office as to how you should proceed, if necessary.

Your firm may compete for, and perform, work on all USDOT Federal Aid projects throughout Florida, receiving DBE credit for work performed in the following areas: **CONTRACT SERVICES: Consulting; Government and Community Relations; Public Engagement; Training; Meeting Facilitation and Planning.**

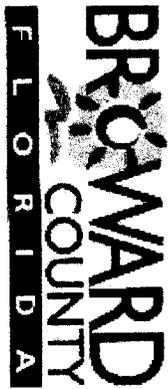
NAICS: 541611; 541820; 611430

Questions or concerns should be directed to this office by mail or telephone. Our telephone number is (954) 357-6400. Our Fax number is (954) 357-6674.

Sincerely,



Chris Atkinson, SBD Manager
Office of Economic and Small Business Development



Office of Economic and
Small Business Development

Governmental Center Annex
15 S. Andrews Avenue, Room A680 • Fort Lauderdale, Florida 33301 • 954-357-6400 • FAX 954-357-8010 • TTY 954-357-5664

This Certificate is Awarded to:

FIDELITY FINANCIAL SERVICES, L.C.

As set forth in the Business Opportunity Act of 2004
and/or the County Business Enterprise Act of 2009, the
certification requirements have been met for:

County Business Enterprise
Small Business Enterprise

Small Business Development Manager

BC CBE/BBE - Certificate Expires: 11/11/2013
The Office of Economic and Small Business Development is liable for any material changes in the business which may affect the amount of County or
Federal tax credit available to the business, and the imposition of other sanctions.

A service of the Broward County Board of Commissioners
www.broward.com/economicdevelopment

EXHIBIT B
TEAM RESUMES

PAMELA A. ADAMS

Post Office Box 1697 • Fort Lauderdale, FL 33302 • (954) 764-8500

Email: padams@adamsconsulting.biz

Website: www.adamsconsulting.biz

PROFESSIONAL EXPERIENCE

Adams Consulting Group, Inc.

President & Founder

Adams Consulting Group, Inc. was established nearly 10 years ago, services offered by ACG include business development, marketing, product and program development and management consulting, to public agencies and private companies.

- Develop plan and implement public awareness and engagement strategies for public and private projects such as infrastructure improvements, public policy and re-development projects
- Develop, plan and facilitate strategic planning and business meetings
- Direct and manage a team of professionals to analyze and develop health care benefit programs for insurance consultants
- Develop and implement strategic plans to assist businesses to meet their objectives

Health Insurance Plan of New York and Florida

Performed in a variety of management roles with increasing responsibility for the oldest and largest health management organization in the City of New York. Held an officer level position on the team to develop HIP of Florida to the second largest health plan in the state of Florida.

HIP Health Plan of Florida, Inc.

Senior Vice President for Operations & Corporate Development

- Responsible for operations, corporate development and new products & markets.
- Developed and managed the company's Claims, MIS, Enrollment, Member Services, Corporate Services and Public Relations departments
- Developed and cultivated opportunities for corporate growth throughout the State of Florida
- Directed all key initiatives organization improvements, first call response resolution, call center development, and the request for proposal unit that insured achievement of the corporate strategic plans
- Successfully managed and executed strategies to acquire new and retain existing large group business

Health Insurance Plan of Greater New York date to date

Managing Director, Enrollment, Billing & Collections

- Managed enrollment functions for more than 900,000 insured persons,
- Direct management responsibility for 12 managers, with indirect responsibility for 115 associates.
- Managed annual billings in excess of \$1 billion for over 4,000 group accounts
- Established policy and operational procedures for the management and maintenance of the enrollment, billing and collections functions.
- Successfully increased receivables in excess of 13.m annually.

Health Insurance Plan of Greater New York

Director of Administration & Hospital Relations

- Conducted impact analyses of New York State and Federal regulations on business operations.
- Assisted in the development and preparation of the annual rate applications for submission to the New York State Insurance Department
- Conducted financial income analysis on benefits offered by the HMO

- Developed and coordinated management strategies for the implementation of new benefits offered by the company.
- Created documentation for internal departments to ensure proper implementation and management of benefits

Health Insurance Plan of Greater New York
Assistant to the President

- Responsible for developing executive summaries on policy issues to support decision making.
- Provided impact analysis on new regulatory requirements
- Prepared monthly reports and presentations to the Board of Directors
- Acted as liaison to resolve sensitive public and policy issues for the President

Health Insurance Plan of Greater New York
Assistant Director, Medicaid Operations

- Oversaw the company's compliance with New York State Medicaid Contract
- Managed contract negotiations with state and city officials
- Developed and implemented programs designed to ensure compliance with local, state and federal health care policy
- Supervised 15 health professionals responsible for the coordination of health care delivery, orientation/education to the company's Medicaid members

Human Resource Administration City of New York, N.Y
Associate Commissioner of Human Resource Operations

- Responsible for employment operations and employment training
- Developed recruitment and employment programs for professional staff
- Created and directed a public recruitment program for Spanish speaking social workers
- Managed and negotiated personnel contracts with temporary agencies
- Managed staff of 115 with 6 managers to provide employment and payroll services to 25,000 NYC employees

Department of Social Services, State of Massachusetts Boston, MA
Director of Administration

- Responsible for managing diversified personnel functions including contract negotiations
- Developed annual budgets
- Managed Federal Child Welfare Grants
- Served as the liaison between the Governor's Office, DSS and Community Groups
- Managed personnel operations for Department

Town of Wellesley, MA
Budget Analyst

- Prepared budget reports for the comptroller and the town's Budget Committee
- Developed and implemented planned program budgeting system
- Presented budget recommendations to finance committee

EDUCATION

M.P.A., Public Administration

Pennsylvania State University, University Park, Pennsylvania

B.S., Sociology

Western Michigan University, Kalamazoo, Michigan



Davicka N. Thompson

davicka@thompsoncreativecollective.com

Mobile: 954-232-1919

Based in Miami, Florida and Dallas, Texas

RELEVANT EXPERIENCE

Thompson Creative Collective

June 2011 - present

Serviced clients include:

Carolina Herrera, Macy's, Simon Corporation, Bitner Goodman, The British Virgin Islands, The City of Dallas

K Strategies Group LLC

Public Affairs Consultant

August 2009 - June 2011

Serviced Clients: Southwest Airlines, the City of Dallas, Dallas/Fort Worth Airport, Dallas Love Field Airport, Pearson

Love Field Modernization Program (LFMP)

Directly responsible for all public relations, marketing and communications activities for the \$519 million project; Tasks include: develop strategies to align brand recognition through public relations, media relations, marketing and events; oversee implementation of the comprehensive Minority, Women and Disadvantaged Business Enterprise (M/W/DBE) program; plan and execute all events with regards to the program, including groundbreaking, outreach and media events on behalf of the City of Dallas and Southwest Airlines; develop and continue to implement program communications plan; proactively manage relationships with key media to communicate program status; lead team in developing program crisis communications plan; Work extensively with key community stakeholders, chambers of commerce and supplier diversity organizations to increase opportunities for M/W/DBE firms; and manage and create content for project website, production of quarterly newsletter and other marketing tools.

City of Dallas' Water Conservation Public Awareness and Advertising Campaign

Direct efforts to build awareness, educate and inform the community about the benefits of water conservation. Responsibilities include: creating presentations for the Dallas Water Utilities' (DWU) director; oversee coordination of community outreach events; manage advertising and social media campaigns; and managing relationships with community organizations. Current projects include create, develop and implement citywide youth summer corps program for Summer 2011 launch.

City of Dallas' Grease Abatement Public Awareness and Advertising Campaign

Direct efforts to engage and educate residents about the Cease the Grease (CTG) campaign: the proper disposal of fats, oils and grease.

Education

Bachelors of Science,
Psychology, Nova Southeastern
University, Davie, Florida

Affiliations

Junior League of Dallas, Member

Rotary Club of Frisco, Youth
Programs Chair

Frisco Arts Association, Board of
Directors

Public Relations Society of
America - Dallas Chapter, Board
Member

Nominated for Women's
Business Enterprise (WBE)
Advocate of the Year 2011-
Women's Business Council -
Southwest

Responsibilities include: develop and communicate two pronged program message focused on collection and recycling campaign; communicate recycling program to local businesses, schools and churches; coordinate placement of grease collection stations in Dallas County; and manage coordination of school, community and church outreach events and program development. Current projects include development of teacher and student curriculum, development of marketing materials for school presentations and development of annual school program plan.

Neiman Marcus

November 2000 - April 2009

Director, Public Relations, Marketing and Special Events, CUSP

May 2007 – April 2009

Led the planning and execution of all public relations and marketing efforts, creating strategic campaigns that maintained and built upon the integrity of the CUSP brand; Created and executed all company events and promotions, garnering outstanding returns on investment; Successful management of \$1 million+ annual event and promotional budget; Conducted focus group, exit interviews and other extensive market research to develop and/or increase business in key markets; Coordinated with 3rd party agencies to implement grassroots and viral outreach; Created and implemented social media strategy and campaign; Oversaw launch of e-commerce site, cusp.com; Developed strategy to increase company's philanthropic initiatives, partnering with several charitable organizations; Traveled extensively to key markets for event coordination, business development opportunities and market research; and direct report for six store managers.

Manager, Corporate Public Relations

April 2004 - May 2007

Managed national media relationships in key markets to positively promote the company; Managed placement of paid and earned media; Successful management of \$5 million+ budget for events annually; Reported directly to Vice President of Corporate Public Relations, and partnered with Vice President of Special Events to design, plan and execute special events as they related to charitable and community organizations, store openings, VIP appearances and store promotional events. Responsible for all event logistics, including production, event décor, catering, entertainment; and responsible for coordinating media relations on behalf of designers and events affiliated with Neiman Marcus.

Assistant Manager, Public Relations

November 2000 - April 2004

Responsibilities included assisting Public Relations Manager in the development of clientele, marketing and event initiatives to increase business and visibility for the store.

References furnished upon request.

Norman E. Taylor Brief Biography



Mr. Taylor retired in 2012 as Director of the Broward County Office of Economic and Small Business Development (OESBD). He was responsible for managing Broward County's economic and small business development programs. The programs include the implementation of the Board of County Commissioners county-wide economic development policy agenda and the economic growth of local small businesses. The OESBD functioned as a full service agency working in partnership with local municipalities as well as regional and state organizations on business recruitment, retention, and expansion efforts. Mr. Taylor directed the County's international trade and investment initiatives, negotiates business incentives, helped to develop public/private partnerships for economic growth, and facilitated business and industry services. Mr. Taylor also promoted and encouraged the development of small business enterprises through the administration of certification, compliance and assistance programs. Since the inception of the Office of Economic Development, Mr. Taylor served as chief staff liaison for Broward County's partnership with the Greater Fort Lauderdale Alliance, the County's official public/private partnership organization for economic development.

Prior to joining Broward County, Mr. Taylor was President/CEO of Norman E. Taylor & Associates, Inc., a marketing and business consulting firm based in Miami, Florida. His firm was the principal agency for Miami-Dade County's national "Wear the Silver Badge" police recruitment campaign in the early eighties. His firm also handled police recruitment promotions for the City of Fort Lauderdale. He was a consultant to Joe Robbie on the development of the new Miami Dolphins Stadium. As an entrepreneur, Mr. Taylor has owned or held partnerships in publishing, real estate development, and consulting businesses. Mr. Taylor worked as a radio personality for seven years.

A strong believer in civic volunteerism, Mr. Taylor was a principal organizer and a founder of Metro-Broward Capital Corporation, Metro-Broward Economic Development Corporation, and The OCTOBER Center, Inc. He has served on numerous non-for-profit boards volunteering in a wide range of community interests.

Current and recent memberships or appointments to boards held by Mr. Taylor include the following organizations: Florida Chamber Foundation Six Pillars Caucus, Enterprise Florida Stakeholders Council, Greater Fort Lauderdale Alliance Board of Directors, Broward Workforce Development Board, South Florida Regional Planning Council, Southeast Florida Regional Planning Consortium, Miramar Cultural Trust Board, City of Pembroke Pines Planning & Zoning Board, and the New Mount Olive Baptist Church Board of Directors.

Mr. Taylor holds a Bachelor of Arts degree from Bethune-Cookman University and a Master of Public Administration degree from Florida Atlantic University. While working for Broward County, he also studied law in the evening division at the University of Miami School of Law. He received certificates in economic development from the Economic Development Institute through the University of North Carolina (Basic Course) and San Diego State University (Advanced Course).

Contact: NTaylor426@aol.com – 954 826 2827 (Cell), 954 357 6400 (Office), 954 962 1677 (Home)

Frank Hall, Jr.
545 North Andrews Avenue, Suite 209
Fort Lauderdale, FL 33301
Phone (954-640-5221)

PROFESSIONAL EXPERIENCE

February 1988 to Present

Frank Hall, Jr., Managing Director of Fidelity Financial Services, L.C., is an outstanding figure among financial advisors and consultants in the southeastern United States. Mr. Hall's background and credentials reflect a broad experience in private and public finance. He has been involved in public tax-exempt bond issues totaling more than \$8 billion.

Fidelity Financial Services, L.C. is a local professional financial advisory and management consulting firm. Fidelity Financial Services, L.C. ("FFS") changed its corporate name from Fidelity Financial Services, Inc. on March 6, 1995, when the firm's structure was converted from a C Corporation to a Limited Liability Corporation. FFS is owned and managed by financial professionals with more than thirty-two (32) years of experience. During the last few years FFS has been ranked as one of the top five (5) financial advisory firms providing services to issuers of public debt within the State of Florida.

FFS advises clients in the area of public finance and provides financial advisory and financial planning services. FFS is knowledgeable of current capital financing techniques and strategies. The firm also has a strong background in fiscal policy matters, particularly as it relates to governmental units.

Prior to forming Fidelity Financial Services, Frank Hall Jr. served as Managing Director of an investment banking firm, Director of Finance in City Government, Director of Accounting in County Government and Senior Auditor for a "Big Six" International Accounting Firm. Mr. Hall has also served as a part-time instructor at Nova University, where he taught Budget and Accounting.

June 1987 to January 1988

Managing Director, Grigsby, Brandford & Co., Inc's Public Finance Division.

Primarily responsible for the firm's bond underwriting efforts in the State of Florida and in portions of the State of Georgia. Also, the responsibilities included investment banking and financial advisory engagements, research and developing structuring of lease/purchase transactions, and the creation of innovative financing mechanisms.

While employed at Grigsby, Brandford & Co., Mr. Hall was responsible for the firm's engagements with such issuers as the Village of Miami Shores, City of Opa-Locka, Oakland Unified School District, City of Riviera Beach, West Palm Beach Housing Authority, City of Tallahassee, Dade County, Atlanta Housing Authority and Broward County.

October 1986 to May 1987

Vice President/Regional Manager, Grigsby, Brandford & Co., Inc's Public Finance Division. Responsible for the firm's Southeastern Regional Office.

January 1983 to September 1986

Director of Accounting, Broward County, Florida.

Complete responsibility of all accounting functions for Broward County government serving 1,600,000 citizens. Duties included financial statement preparations, implementing accounts and accounting system, certification of budget availability, processing payments to vendors, maintaining accounting records, payroll operations, etc. Additionally, assisted in developing plans/strategies and obtaining financing for proposed capital projects (i.e. bonding involved in the issuance of more than one billion dollars of tax-exempt debt, leasing).

May 1976 to December 1982

Director of Finance, City of Hallandale, Florida.

Initially employed as Comptroller of General and Special Funds. Promoted within 5 months to Director of Finance serving as both department head and managerial aide to the City Manager. This involved advising on fiscal policy and monthly/annual financial report preparations, management of City budget, cash, investments and insurance, payroll processing as well as coordinating and administering the budget process.

June 1972 to April 1976

Senior Accountant, Price Waterhouse & Co., CPA's Miami, Florida.

Initially employed as Staff/in-Charge Accountant assisting in the completion of medium and large sized audits in the areas of manufacturing, park concessions, retail land sales, real estate investment trusts, property management, insurance, airlines, retailing, municipalities, schools and hospitals. Promoted in February 1975 to Senior Auditor, responsible for supervising and training staff auditors and completing assigned audits as above.

**TEACHING EXPERIENCE/
SPEAKING ENGAGEMENTS**

Instructor, Lambres CPA Review Course, Miami, Florida. Provide instruction on fund accounting.

Adjunct Professor, Nova University, Fort Lauderdale, Florida. Undergraduate class entitled budgeting in Community Services, teaching budgeting to students enrolled in the University's Community Services.

Guest Speaker on Variable Rate Tax Exempt Debt at the Annual State and Local Government Accounting Conference of Florida. Institute of Certified Public Accounts.

Developed and lectured at workshops on Budgeting for the Dade County Community Action Agency.

Guest Speaker on Budgeting at the Headstart Convention.

Speaker at various local government organizations' functions on planning for and managing audits and capital formation.

AFFILIATIONS

Chairman of the Board of Directors of North Dade Community Development Federal Credit Union; Member of Board of Directors Consumer Credit Counseling; One Hundred Black Men of South Florida, Inc.; Board Member of Fort Lauderdale Community Development Corporation; and Associate Member of Government Finance Officers Association.

EDUCATION

June 1972

Bachelor of Science in Accounting, Florida State University, Tallahassee, Florida. Graduated in top quarter of class.

September 1970

Associates of Arts in Accounting, Miami-Dade Community College, Miami, Florida.

LICENSE

Certified Public Accountant

WORKSHOPS/SEMINARS

Workshops on fund accounting, auditing, internal control, management efficiency, grants management, analyzing grant funded programs and projects, financial accounting, bonding of capital projects, creative financing and tax exempt leasing

**EXHIBIT C
COST PROPOSAL FORM**

RFP # FY 2011-2012-017

**COMPLIANCE MANAGER, SMALL BUSINESS ENTERPRISE, COMMUNITY
BENEFIT PLAN AND LOCAL VENDOR PREFERENCE**

PAGE 26, 27, 28, 28, 29 AND 30 OF 48

COST PROPOSAL FORM

Print name of Proposer (company name)

Adams Consulting Group, Inc.

**RFP # FY 2011-2012-017 COMPLIANCE MANAGER SERVICES - SBE,
COMMUNITY BENEFIT PLAN AND LOCAL VENDOR PREFERENCE FOR
PROJECTS**

The undersigned, as Proposer, hereby declares that the only person or persons interested in the proposal, as principal or principals, is or are named herein and that no other person than herein mentioned has any interests in the Proposal of the contract to which the Work pertains; that this Proposal is made without connection or arrangement with any other person, company, or parties making Bids or Proposals and that the Proposal is in all respects fair and made in good faith without collusion or fraud.

The Proposer further declares that he has examined the requirements and scope of work; that the proposal pertains.

The Proposer proposes and agrees, if this Proposal is accepted, to timely execute a contract with the City in the form attached and to furnish all necessary materials, all equipment, all necessary, tools, apparatus, means of transportation, and employees necessary to complete the Work specified in the Proposal and Contract, and called for by the specifications and in the manner specified and to timely submit all required bonds and insurance certificates.

NOTE: ANY SCHEDULE OF PROPOSAL ITEMS ARE MERELY ILLUSTRATIVE OF THE MINIMUM AMOUNT/QUANTITY OF WORK TO BE PERFORMED UNDER THE CONTRACT. IN THE CASE OF ANY CONFLICT BETWEEN THIS SCHEDULE OF PROPOSAL ITEMS AND THE CONTRACT DOCUMENTS, THE CONTRACT DOCUMENTS WILL PREVAIL.

The Proposer further proposes and agrees to comply in all respects with the time limits for commencement and completion of the Work as stated in the contract form.

The Proposer agrees to execute a contract and furnish the executed contract, all required bonds, insurance certificates, and other required information to City within five (5) calendar days after the date of award of contract. Failure on the part of the Proposer to timely comply with this provision shall give City all rights and remedies set forth in the Instructions to Proposers.

PAGE 27 & 28 OF 48
RFP # FY 2011-2012-017
COMPLIANCE MANAGER
SMALL BUSINESS ENTERPRISE
COMMUNITY BENEFIT PLAN AND
LOCAL VENDOR PREFERENCE

It is understood that the unit prices quoted or established for a particular item are to be used for computing the amount to be paid to the Contractor, based on the Work actually performed as determined by the contract and the City. However, in utilizing the schedule, the Proposer agrees that in no event shall compensation paid to the Proposer under the contract exceed the dollar amount of the Proposer's proposal amount, as set forth in the attached proposal form.

In no event shall the City be obligated to pay for work not performed or materials not furnished.

Proposer's Occupational License No. Broward County 327-11181 and City of Fort Lauderdale 734804

WITNESS



By: 
Authorized Signature

(SEAL)

COST PROPOSAL FORM SHEET

No cost increase will be accepted during the contract period through September 30, 2017. All services to be provided for each year of the contract at a percentage of % _____ of the total project's cost. **Please see the Cost Proposal Form below.**

The Consultant has provided you with All services to be provided for each year of the contract at a percentage by year as well as the cost per year. The % anticipated time .Due to the estimated number of hours allotted to perform the services in Phase I and II cost and percentage of time is greater than in the succeeding years as illustrated in Section 11 Approach to the Scope of Project on page 10.

Cost Proposal Form

Year	Phase I	Phase II	Phase III	Total (1)	% of Total Project Cost	Hours
1	96,250.00	17,500.00	275,450.00	389,201.00	.25	2224
2		20,000.00	275,450.00	295,450.00	.18.75	1688
3		20,000.00	275,450.00	297,450.00	18.75	1688
4		22,000.00	275,450.00	297,450.00	18.75	1700
5		22,000.00	275,450.00	297,450.00	18.75	1700
Total	96,250.00	101,500.00	1,377,250.00	1,575,000.00	100%	9000

(1)Professional Fees are based on a blended rate of \$175/hour

PAGE 28 OF 48
 RFP # FY 2011-2012-017
 COMPLIANCE MANAGER
 SMALL BUSINESS ENTERPRISE
 COMMUNITY BENEFIT PLAN AND
 LOCAL VENDOR PREFERENCE

Firms must stipulate any additional services that are foreseeable and may be required as part of this RFP which have not been outlined in the scope of work but are inherent for these type of services. Such services should be provided by your firm, when and if required, and your firm must provide an hourly rate with an explanation of the scope of such services. Please provide below or attach as an Exhibit to your firm's proposal.

DESCRIPTION OF SCOPE OF WORK	HOURLY RATE FOR TERM OF
Revisions to the character of the program that requires additional hours.	\$ 175.00
Consulting services to identify tools within the existing policies of the City. The ACG Team will examine City of Hallandale procurement policies, accounting and project management policies to assess the tools necessary to implement an effective small business enterprise program; and make recommendations to close policy and program gaps, i.e., enabling resolutions, ordinances. (12 hours) Consulting services to identify tools within the existing Program.	\$ 175.00
Consulting service to develop a streamlined SBE Program. . Following the tools assessment work, the ACG Team will develop a program flow chart reflecting interagency coordination among the City agencies as well as Broward County as it relates to SBE certification processing non-certified small business seeking to participate in the City's SBE Program. (12 hours)	\$175.00
Consulting services to formalize a City of Hallandale CBE/SBE Ordinance/Policy for CBE and vendor certification program. The ACG Team will draft, for City staff and City Attorney review and consideration, internal program policies and procedures tailored to meet the City's goals under its Community Benefit Plan. The City will receive the following from the ACG Team: Draft Resolution and/or Ordinance enabling the SBE Program and establishing coordination among City agencies and Broward County; SBE Program Administrative Policies to ensure coordination among key agencies such as departments, Purchasing, and Finance/Accounting; and Performance Benchmarking and Measurements. (40 hours)	\$175.00

<p>Consulting services to assist to develop Policy and Procedure manual to include compliance, non-compliance, reporting requirements. Following final adoption of formalized policies and general procedures, the ACG Team will prepare a manual to guide consultants, staff, and City contractors in (a) compliance with the new policies; (b) identifying matters of non-compliance; and (c) reporting program activity. (40 hours)</p>	<p>\$175.00</p>
<p>Assist the City to select a software system that will interface with finance and procurement operations. The ACG Team recognizes that successful small business program around the country utility diversity management software to efficiently collect, track, and accurately report small business program activity. This information is needed by policymakers, City Administrators, and community residents in determining the true benefits of a small business enterprise program. ACG proposes to help facilitate the interface among City agencies using information technology (IT) software. ACG will prepare an IT Requirements Analysis document to guide in the selection an appropriate software program for the City. (20 hours)</p>	<p>\$175.00</p>
<p>Assist the City establish a web based vendor directory. The City needs a web based Vendor Directory that provides easy access to SBE/Local Vendors by contactors. The system will be operated/updated by the City, the Consultant will assist the City to maintain and manage data base of CBE/SBE vendors.</p>	<p>\$175.00</p>

Any variances to the specifications, plans, RFP and/or the Contract must be specified here (provide additional pages if necessary):

1. ACG does not have any questions about the specifications, plans or RFP.

2. ACG understands the contract is a "sample" and that it is typical to discuss and negotiate terms and conditions once a contract is awarded but we present the following questions:

- Page 34: Indemnification. The contract does not provide for double indemnification.
- Page 38 6.2. 1 Method of Payment. Definition of what is not accepted by the City. " If the City finds the invoice not to be acceptable, notice shall be provided to the Consultant within seven (7) days of receipt of the invoice from the Consultant.

PAGE 30 OF 48
RFP # FY 2011-2012-017
COMPLIANCE MANAGER
SMALL BUSINESS ENTERPRISE
COMMUNITY BENEFIT PLAN AND
LOCAL VENDOR PREFERENCE

THIS PROPOSAL SUBMITTED BY:

COMPANY:	Adams Consulting Group, Inc.
ADDRESS:	545 North Andrews Avenue
CITY & STATE:	Fort Lauderdale, FL
ZIP CODE:	33301
TELEPHONE:	954-764-8500
DATE OF RFP:	May 31,2012
FACSIMILE NUMBER:	954-337-0209
E-MAIL ADDRESS:	<u>padams@adamsconsulting.biz</u>
FEDERAL ID NUMBER:	65-108-3738
NAME & TITLE PRINTED:	Pamela A. Adams, President
SIGNED BY:	

WE (I) the above signed hereby agree to furnish the item(s), service(s) and have read all attachments including specifications, terms and conditions and fully understand what is required.

The Request for Proposals, Specifications, Proposal Forms, and/or any other pertinent document form a part of this proposal and by reference made a part hereof. Signature indicates acceptance of all terms and conditions of the RFP.

EXHIBIT D

PROPOSED SMALL BUSINESS ENTERPRISE COMPLIANCE REPORTS

SBE PROJECT FUNDING SOURCE	(All)	Ethnicity	DBE	Gender	Data	
					Net Total Contract \$	Count of MWDBE Subs
City	(All)					
Prime Contract Type						
Architect & Eng	Asian-American	N	M	0.00	1	
	Caucasian	N	F	0.00	1	
		Y	F	0.00	4	
	Hispanic American	N	M	0.00	4	
		Y	M	0.00	7	
Architect & Eng Total				0.00	17	
Construction	African American	N	M	0.00	2	
	Caucasian	N	F	0.00	8	
		Y	F	0.00	4	
	Hispanic American	N	M	0.00	1	
		Y	M	0.00	4	
Construction Total				0	19	
Other Prof Svcs	African American	Y	F	0.00	2	
	Caucasian	Y	F	0.00	1	
Other Prof Svcs Total				0.00	3	
Grand Total				0.00	39	

SMALL BUSINESS ENTERPRISE UTILIZATION REPORT BY TIER

Description	SBE/W/DBE Contracts	MWDBE Payments Rec'd	% Complete
Prime - MWDBE	\$3,815,852.92	\$214,342.70	5.62%
1st Tier	\$3,637,981.61	\$2,508,618.93	68.96%
2nd Tier	\$524,666.26	\$5,400.00	1.03%
Total	\$7,978,500.79	\$2,728,361.63	34.20%

Instructions for Completing Schedule of Work and Actual Payment Form
(Form 4)

Contract Name: _____ Contract Number: _____ Contract Start Date: _____ Contract End Date: _____
 Contract Type: _____ Contract Category: _____
 Contract Start Date: _____ Contract End Date: _____
 Contract Category: _____

1. Fill in the information requested in the instructions.
2. Complete the Schedule of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.
3. Complete the Summary of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.
4. Complete the Summary of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.
5. Complete the Summary of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.

Year of Contract: _____ Total Contract Value: _____
 Contract Start Date: _____ Contract End Date: _____
 Contract Category: _____

Contract Item	Description	Start Date	End Date	Contract Value	Actual Payment	Completion
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1. Complete the Summary of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.

Contract Item	Description	Start Date	End Date	Contract Value	Actual Payment	Completion
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2. Complete the Summary of Work and Actual Payment Form for each contract item. Complete the form for each contract item before you begin your work.

Contract Item	Description	Start Date	End Date	Contract Value	Actual Payment	Completion
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