



**KEY WEST**

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# City of Key West, Florida

*RFP # 005-20*

*Strategic planning services*

April 29, 2020

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now, for tomorrow.



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# Cover letter

April 29, 2020

The City of Key West  
Office of the City Clerk  
1300 White Street  
Key West, Florida 33040

Dear members of the City Commission,

Enclosed is Baker Tilly Virchow Krause, LLP's (Baker Tilly) response to the City of Key West's (the "City") Request for Proposal RFP #005-20 for strategic planning services. The enclosed proposal response demonstrates that Baker Tilly possesses the expertise and capability to assist you with this important project:

- A proven process to consistently provide quality consultants who match your RFP requirements and who will fit into your organization's culture
- An experienced service team who seeks to understand your existing environment and the challenges the City faces in providing high-quality services to its citizens and local businesses. We have structured our proposal to meet the specific needs of Key West as detailed in its RFP. Our process includes the following tasks:
  - Facilitate a community visioning process through public meetings and presentations, stakeholder focus group sessions, outreach, phone and online surveys, print and social media and discussions with elected officials and staff
  - Conduct situational analysis of the City of Key West organization
  - Facilitation of revisions to the Vision, Core Values and Mission of the organization and development of the goals and objectives that support the Vision, Values and Mission
  - Identify strategic initiatives that support the community
  - Development of processes to keep the City Commission and staff engaged in a continuing strategic planning process
  - Development of an action plan to convert the strategic initiatives into actionable programs
  - Recommendations on appropriate implementation methods and tracking of progress in achieving the adopted strategic initiatives
  - Preparation and presentation of a Strategic Plan document for approval by the City Commission and appropriate public presentation material
  - Provide additional implementation and support as needed by the city over the first two years of implementation

We have also provided an alternate task to provide additional strategy implementation and execution, as well as management support as needed.

Above all, the City of Key West deserves exceptional service from your professional services firm, distinguished by timely and responsive service. To ensure that you receive our best efforts, we will be personally involved in all aspects of our work with the City. We look forward to discussing the details of our proposal and any questions you may have during the process.

Respectfully,

BAKER TILLY VIRCHOW KRAUSE, LLP



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# Table of contents

<b>COVER LETTER</b> .....	<b>1</b>
<b>TABLE OF CONTENTS</b> .....	<b>3</b>
<b>SCOPE OF WORK</b> .....	<b>4</b>
INTRODUCTION .....	4
PROJECT CONTACTS AND LOCATIONS .....	4
OUR UNDERSTANDING OF KEY WEST'S NEEDS .....	4
APPROACH AND METHODOLOGY .....	5
STUDY OBJECTIVES AND SCOPE .....	5
DATA SETS NEEDED TO DEVELOP YOUR STRATEGIC PLAN .....	7
PROJECT TIMELINE .....	12
PROJECT TEAM .....	13
ORGANIZATIONAL CHART .....	13
RECENT PROJECTS .....	15
REFERENCES .....	16
EXPERIENCE .....	18
<b>REQUIRED FORMS</b> .....	<b>20</b>
<b>PRICING</b> .....	<b>31</b>
VALUE FOR FEES .....	31
ASSUMPTIONS .....	31
ADDITIONAL WORK .....	31
HOURLY FEES .....	32
EXCEPTIONS .....	32
<b>ADDENDUM ACKNOWLEDGEMENT</b> .....	<b>33</b>

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# Scope of work

## Introduction

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country — and internationally. As a member of Baker Tilly International, the world's 10th largest accountancy and business advisory network, we are able to extend our reach through trusted relationships with firms located across the country and throughout the world.

Baker Tilly was founded in 1931 with one central objective: to use our industry specialization to help our clients improve their businesses. For more than 85 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with the City as we seek to become your Valued Business Advisor.

Key facts about Baker Tilly:

- Provides a wide range of accounting, tax, assurance and consulting services by more than 3,900 total staff members, including 407 partners
- Headquartered in Chicago
- Ranked among the 15th largest accounting firms in the U.S.
- Serving clients with industry-focused teams

## Project contacts and locations

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## Our understanding of Key West's needs

The City of Key West is seeking a qualified consultant to guide the City of Key West with the development of a comprehensive Strategic Plan. The overall objective is to create a written strategic plan document that presents the planning process, the research, the analysis, opportunities and strategies along with an implementation plan that will guide the City of Key West for the next three to five years. Our recommendations will assist in achieving the development of the goals and objectives that support the Vision, Values, and Mission of the City of Key West organization.



## Approach and methodology

Our approach is targeted to achieve your stated objectives and its scope is focused on your top priorities. While we have customized the individual tasks to your unique requirements, we have organized them within a logical methodological framework.

## Study objectives and scope

The City of Key West is seeking to engage an experienced consulting team to perform strategic planning services. The objectives are to:

- Include and involve the residents and businesses in determining the vision of the community
- Engage the City Commission and City staff in the process of strategic thinking and planning
- Assess the capacity of the Key West organization to address the needs identified by the community
- Revisit the Vision, Goals and Mission of the organization and identify strategic initiatives that support the community
- Identify processes to keep the City Commission and staff involved and engaged in a continuing strategic planning process
- Provide an action plan with implementation techniques and tools to track progress
- Prepare and present a Strategic Planning document to guide the organization to meeting the current and future needs of the community
- Support the implementation of the adopted Strategic Plan through monitoring and, as needed, mentoring of city staff

We are confident that a careful review of our project plan and the qualifications of our team will demonstrate that the Baker Tilly team is a great choice for this crucial initiative.

## Proposed solution to meet Key West's needs

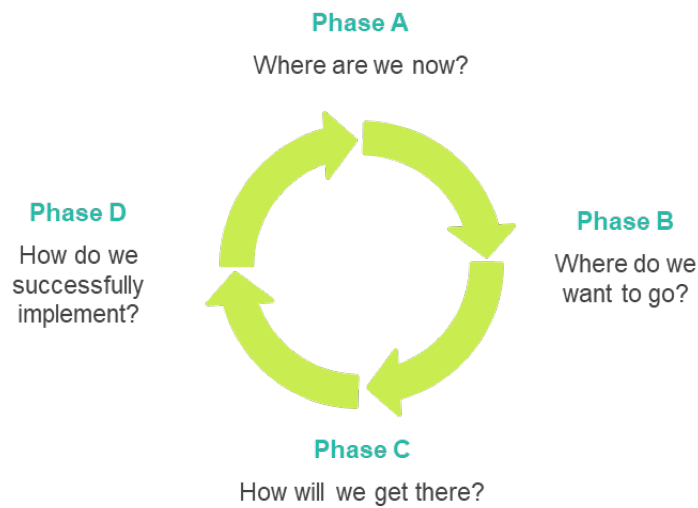
To achieve these ends, our approach to the strategic planning project includes the following attributes:

- **Collaboration** – While we understand that Key West is the ultimate “consumer” of the work product of the planning effort, we believe that the best strategic plans are those that are prepared in close partnership with our clients delegated participants.
- **Facilitation** – To promote acceptance and buy-in to the strategic plan our facilitation and engagement process will be highly interactive, supported by visual planning tools and technologies and designed to elicit as much input, as many ideas and as varied a set of perspectives as we can.
- **Innovation** – At appropriate times throughout the planning project we will use innovative consensus building and prioritization tools. As an example, our CoNexus decision-support technology allows for anonymous keypad voting and the display of real-time results to help participants see the results as they are obtained and to discuss and clarify their impacts.

## Why Baker Tilly is ideally suited to serve Key West

We believe that part of our responsibility as a consultant to you is to “see the City as it is” and to facilitate creation of strategies that respond to your unique circumstances. To do this, we will employ certain best practices and incorporate the latest state of the art techniques in the final strategic plan that we believe will yield significant benefits to you.

The strategic planning process utilized by Baker Tilly is illustrated below and includes the following steps:



The planning process we will employ is highly collaborative in nature, focused on the engagement of key stakeholders identified by you. We will apply a variety of graphical and technology-enabled tools and techniques including, among others:

- Industry-leading graphical planning templates developed by the Grove Consultants International to build a visual record of the core elements of the strategic plan.
- Visual Explorer™ images from the Center for Creative Leadership to build and describe a vision for the City’s future.
- Online and/or wireless technology to support participant engagement and the collaborative ranking and prioritization of strategic goals, including PollEverywhere.com and IdeaSciences CoNexus.



## Data sets needed to develop your strategic plan

### a. Prior information needed

The professional services provided to Key West by the Baker Tilly team are purely advisory in nature. The City will assume full responsibility for all implementation decisions.

Key West will appoint an implementation team consisting of five to seven respected leaders and staff members to assume the responsibility for the deployment of the adopted strategic plan and to serve as “champions” for strategic management going forward.

Additionally, the City will be responsible for providing a variety of supporting services and activities. These include:

- Current statements of mission, vision and guiding principles
- Current goals, objectives and performance measures
- City and departmental organizational charts
- Current operating budget, financial forecast, annual financial reports, multi-year revenue and expenditure projections and other financial documents (i.e., Five Year General Fund Forecast, Five Year Capital Plan, etc.)
- Prior employee and citizen survey results
- City and regional demographic data and growth trends
- List of current public facilities
- Prior employee and citizen survey results
- City and regional demographic data and growth trends

We will establish a shared data storage site via Huddle or a similar mechanism for the electronic upload and sharing of requested data. The data supplied will be reviewed by the Baker Tilly planning team in advance of the following task.

### b. Suggested process

The Baker Tilly team will assist Key West in defining, developing and documenting a strategic plan to guide future decision-making for the City. Our approach is multi-faceted and best-practices based, including the elements described in greater detail below.

Major elements included are:

- Active involvement of the City Commissioners, staff and citizens
- Perform a situational analysis to identify significant trends, conditions and issues that could impact the Key West municipal organization and its ability to meet the service expectations of its residents and businesses
- Assessment of the of the current Strengths, Weaknesses, Opportunities and Threats (SWOT) of the Key West organization
- Review/revision of Key West’s current Vision and Mission Statement, including the core values as identified by the City
- Development of a Strategic Plan including goals and objectives as well as identification of specific initiatives required to meet your goals and objectives
- Identification of recommendations for implementation of the revised plan, including strategies to encourage continued engagement by elected officials and staff
- Establishment of metrics with which to measure, evaluate and improve the revised plan as necessary



- Development of a communication plan which outlines steps to be taken to successfully communicate the Strategic Plan to Key West’s employees and citizens

The work plan specifically addresses these items and includes, but is not limited to:

**Conduct an initial kick-off meeting to introduce the planning team, review and refine the strategic planning approach and confirm project participants and timelines**

We will work with Key West and those designated to clarify and refine the scope of the strategic planning effort. Completion of this task helps to ensure a shared understanding between Key West and the consulting team of the answers to such questions as:

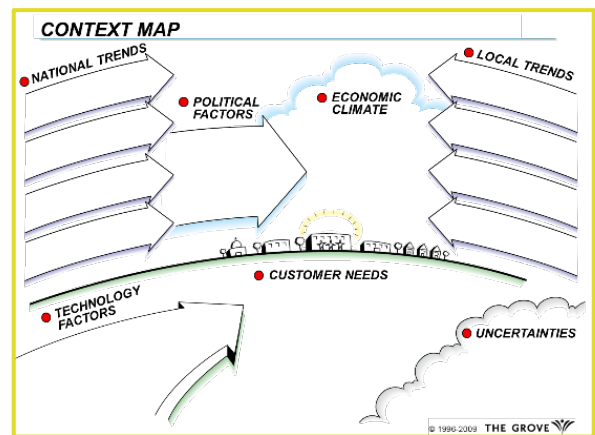
- Confirm the purpose and intended use of the Strategic Plan? (What does a successful project look like?)
- What is the best method for engagement of your organization and citizens in the planning process?
- Where and when should the planning workshops be held?
- What is the level of Key West’s resource commitment to the strategic planning project?
- What are the important milestone dates and other time constraints that the team must respect?
- Given the answers to the above and other questions, what revisions to the proposed project plan are required?

While our typical approach to the project initiation activity is to meet on-site, this is a task that could be accomplished through teleconference and/or web-based meeting technology.

**Complete discovery interviews and focus groups**

Stakeholder involvement and engagement is a cornerstone of successful strategic planning. In this task, the planning team will involve key stakeholders in the City – including the City Commissioners, department heads, staff and citizens in a series of discovery activities.

We will administer a phone and online survey questionnaire to gather pertinent information on current priorities, issues, opportunities and constraints facing Key West both today and in the future, existing public facilities, services and priorities. We will coordinate with the City to make the online survey available to the residents and businesses of Key West. The questionnaire responses will be tabulated and summarized in advance of discovery interviews to ensure the most efficient use of time.



Discovery interviews with the key stakeholders noted above will be conducted individually or in groups, if desired by the participants. We will discuss the key community and operational issues and concerns that need to be addressed in the strategic planning work sessions and will look for the common, resonant themes among the various interview participants. We will then use the results of these interviews to plan and facilitate strategic planning workshops for the City Commissioners as well as appropriate members of City administration.

Results of the entire discovery process will be documented in writing and forwarded for review and validation.

**Design and facilitate a robust community visioning process to solicit input on the strategic plan from residents, business owners and City employees**

We will first examine the current public input mechanisms in place, if any, and then work with the City Commissioners to determine the depth and breadth of input desired based upon current mechanisms, as well as time and budget constraints. Community stakeholder input will be gathered at up to four “town hall” type meetings facilitated by Baker Tilly and its partner, Caso & Co., held at various locations in the City.

In addition, up to 10 meetings will be held with external stakeholder groups designated by the City which could include:

- Community groups
- Commissions
- Nonprofits
- School officials

Additional stakeholder meetings can be held at an additional cost to be agreed upon by Baker Tilly and Key West.

The process allows large numbers of people to participate or provide input on various questions based upon facilitated sessions. These sessions will provide a forum for broad participatory input. When possible, Baker Tilly approaches conversational leadership using facilitative processes based on principles first discovered by Juanita Brown and David Isaacs in the mid 1990’s. Collectively known as World Café, they comprise a powerful social technology for engaging people in conversations that matter. Using seven design principles, these techniques focus on real-life concerns of the group by the simple technique of rotating participants in ‘rounds’ of conversation.

The seven principles are:

1. Set the context
2. Create hospitable space
3. Explore questions that matter
4. Encourage everyone’s contribution
5. Connect diverse perspectives
6. Listen together for patterns and insights
7. Share collective discoveries

Employee input will be obtained through four meetings with representatives from designated functional areas of City operations and a written summary of the results of the various outreach and involvement efforts will be prepared.

Application of these techniques and process will produce an array of ideas, concerns and suggestions of the members of the Key West community and will establish the foundation for the Commission’s development of a visionary, yet pragmatic, strategic plan. Baker Tilly will facilitate the meetings and prepare written analysis summarizing results.

### **Design and facilitate a high-impact City Commission strategic planning workshop**

In this task, and based on the results of the discovery interviews, employee focus groups and the community visioning process, Baker Tilly will consult with the Mayor, City Manager, and appropriate others to define planning workshop participants, process, agenda and required logistics. We recommend that the workshop cover 1 ½ to 2 days of intensive engagement between and among the Mayor, City Commissioners, City Manager and other key members of the executive team. These may include, subject to the City’s confirmation, City Manager, Assistant City Manager, City Attorney, and City Clerk. The City may also consider inclusion of department-level managers as observers and information resources to the direct participants.

Baker Tilly consultants will guide participants through a series of individual and collaborative group activities to gain clarity on the desired “future state” of Key West. These will include:

- An initial ice-breaker/team building activity.
- Completion of a situational analysis of the Key West community and organization documented in the form of a graphical “context map.”
- Assessment of organizational strengths, weaknesses, opportunities and threats.
- Preparation of preliminary draft statements of vision, mission and values.
- Identification of mission-critical service and business processes.

Then using a collaborative and interactive graphical process, supported by advanced technology tools for group consensus building and prioritization, the Baker Tilly team will facilitate the identification and prioritization of strategic goals for Key West. These strategic goals will then be rank ordered and evaluated in terms of their strategic importance and current performance to establish those goals that, if achieved, can have the most impact on the City’s ability to achieve its mission.



Throughout the planning workshop, the project team will help the participants maintain focus on the following critical issues the City seeks to address during this process, including:

- Clarification of the City’s priorities, defining its role in service delivery, and structuring the organization to achieve its mission
- Maximizing the organization’s effectiveness, efficiency, and competencies to drive responsive, high-quality service delivery
- Closing gaps in the delivery of needed services, including the consideration of alternative service delivery models
- Identifying goals and action plans that support and enhance community commerce, collaboration, condition, and character

### Identify operating objectives and initiatives

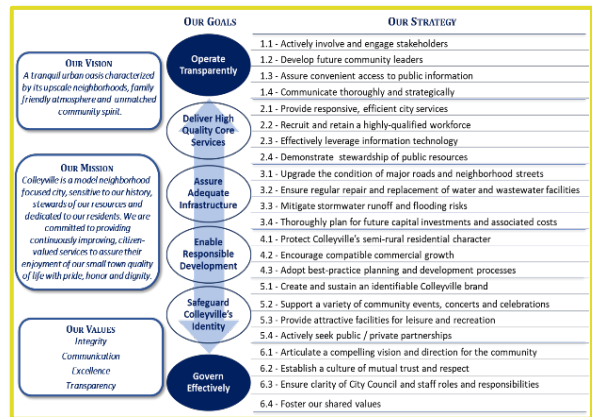
Building on the work completed in the strategy development workshop, the planning team will next work with Key West’s administrative leadership to more fully develop the specific operating objectives and individual programmatic initiatives needed to achieve the strategic goals established by City Commissioners. We will do this through a process of “homework” assignments for the departmental staffs, coordinated through the City Manager’s office and staff.

### Prepare a draft strategic plan

The Draft Strategic Plan will be complete in all material respects and will include:

- **Vision, mission and value statements** for Key West
- **Situational Analysis:** Including a review of Key West’s external environment including an assessment of local, state and national trends, citizen expectations/needs, economic and political factors
- **SWOT analysis:** A review of Key West’s strengths, weaknesses, opportunities and threats
- **Goals, objectives and initiatives:** A planning matrix that outlines what Key West intends to achieve over the next three to five years

- **Strategy map:** A graphical depiction of the overall strategy that illustrates the linkages between the vision and mission to the strategic goals and objectives of Key West illustrated at right
- **Timeline and accountabilities:** An overview of when efforts to implement Key West’s strategies are to be initiated and completed and designation of individuals who are assigned to take responsibility for ensuring each initiative is addressed
- **Prioritization of services:** A process for Key West to evaluate and prioritize services they provide and to better understand the cause and effect relationship they have on the City’s priorities.
- **Methods for monitoring success and identification of key performance indicators:** A strategy for identifying key performance indicators used regularly to monitor progress in reaching the identified strategies and objectives of Key West’s strategic plan and including, potentially, the implementation of supporting strategic plan technology



**Develop communication plan**

In concert with development of the Strategic Plan, a communications plan will be developed for distribution of the strategic plan to Key West staff and citizens when approved by the governing body.

**Develop final strategic plan**

Develop the final strategic plan and its final tenets utilizing input gained from the discussion session on the draft plan. This will include two on-site meetings, one to present the plan to elected officials in a public session and one to present the plan to Key West staff and other designated groups. The final Strategic Plan will include the elements outlined above and will highlight the following elements:

- Vision, mission and values statements
- Environmental scan (Context Map)
- SWOT (strengths, weaknesses, opportunities and threats) analysis
- Prioritized goals, objectives and operating initiatives to achieve the strategic purposes of the municipal organization
- A process for the continuous reevaluation of strategic success and refinement of the strategic plan as necessary

**Provide additional strategy implementation and support as needed**

Strategic planning efforts often fail. They more often fail in execution than they do by the adoption of a flawed strategy. Therefore, the plan for deploying Key West’s new strategy to the operating departments and the development accountability protocols in the form of performance measurement and monitoring, are crucial to the long-term success of the planning effort. In this and subsequent tasks, the center of gravity of the consulting process shifts away from the consulting team and towards the Key West administrative team. Depending on the specific results of the strategic planning process, Baker Tilly will be available to deploy its deep bench, which includes our onsite partner Caso & Co., of resources and expertise to help the Key West team drive successful implementation of the Strategic Plan and provide change management guidance in the transition from the current state to the desired future state and monitor and report on progress.

Example implementation and strategy execution support tasks could include, but are not necessarily limited to:

- Define and select implementation teams and sub-teams based on the adopted strategic goals and objectives
- Work with the City Commissioners and department leadership to identify implementation team leaders, participants and departmental points of contact and to secure their commitment to their assigned implementation projects
- Assist in the creation of an overall program management structure and team to integrate organizational implementation efforts with other, ongoing efforts to drive and manage strategic and cultural change
- Conduct an intensive implementation workshop for all individuals tasked with implementation activities to:
  - Ensure their understanding and intent of the recommendations
  - Review timing and sequencing and, if necessary, revise same
  - Understand key aspects of change management best practices and tools
- Establish implementation status reporting mechanisms, audience and schedule
- Provide periodic independent status updates to the City Commissioners, as requested
- Conduct specific research, analysis, feasibility studies, risk assessments or similar projects as may be warranted and value-added
- Reinforce the change:
  - Develop and support an internal communication program
  - Collect and analyze feedback
  - Diagnose gaps and manage resistance
  - Implement corrective action as needed and celebrate successes

### Deliverables:

At the conclusion of the strategic planning effort, Key West will receive the following deliverables:

- Recommended package of material suitable for public distribution and outreach
- Final Strategic Plan document that includes implementation plan with defined milestones and benchmarks intended to measure the City's progress
- Executive summary of the Strategic Plan
- Strategy implementation and execution support

### Project timeline

*Baker Tilly takes pride in meeting its time commitments.*

Baker Tilly has the resources to begin work on this project within 10 days from the notice to proceed. We have provided a proposed project schedule that provides for the completion of the strategic plan within 12 weeks, provided that all necessary information is made available to us in a timely manner and that the necessary City staff are available for meetings as needed by the scheduled work plan. Should any unforeseen delays or circumstances arise, we can draw on additional staff to keep the project on schedule to the greatest extent possible.

*There are factors that impact upon meeting the schedule that are beyond the consulting team's control. The proposed time frame is contingent upon a timely decision, the receipt of the data from the participants when requested and the timely receipt of feedback and comments on the submitted preliminary data.*

A schedule depicting each of the task activities shown below.

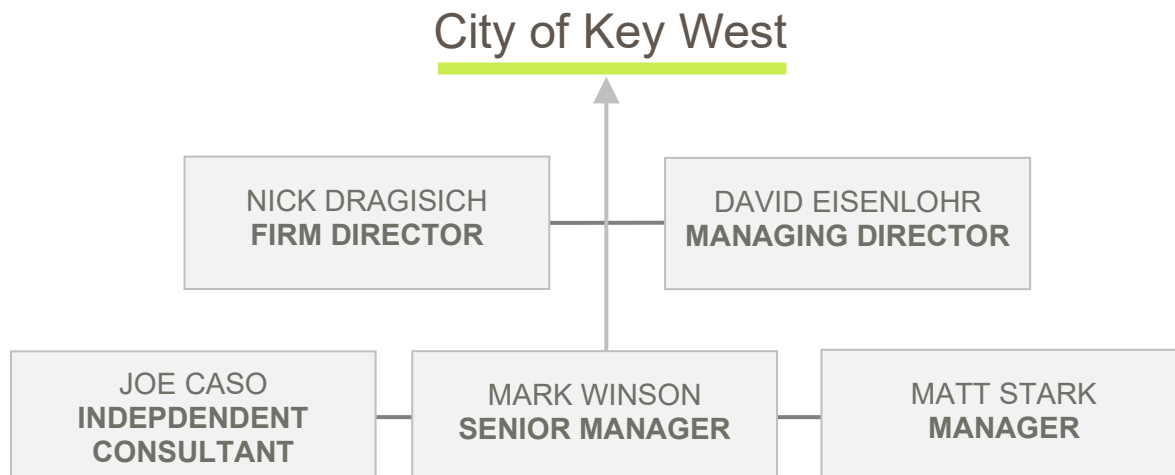
City of Key West Strategic Planning Services	
Activity	Target Date
– Initial Kickoff Meeting and Information Gathering	Week 2
– Focus groups	Week 3
– Develop community engagement plan	Week 4
– Community outreach activities	Weeks 5-7
– Survey	Week 7
– Workshop with City Commission	Week 4
– Workshop with Staff	Week 4
– Draft Strategic Plan development and review	Weeks 4-8
– Workshop with staff on development of Action Plan	Week 9
– Create Action Plan	Weeks 9-10
– Development of Communication Plan	Week 10
– Presentation of Final Strategic Plan to City Commission	Week 12
– Monitor and support implementation activities	TBD


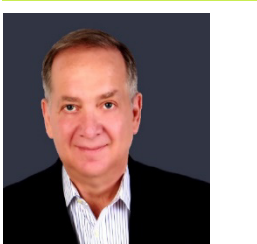
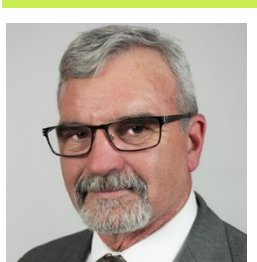
### Project team

*The Baker Tilly project team is designed specifically for Key West and represents the experienced professionals who will be working with the City.*

Each client draws on the talents of many members of our staff. We assign a specific client service team to ensure primary responsibility for each project. The Key West team is comprised of qualified individuals who are experienced in the specific challenges confronting you. The staff assigned to your project are experienced in local government management and operations. The team is free to draw upon the expertise of our entire staff.

### Organizational chart



<p><b>Firm Director</b></p>	<p><b>Nicholas Dragisich, P.E.</b></p>
	<p><b>Qualifications:</b> Nick is team leader for Baker Tilly’s management consulting services team. He has more than 30 years of management experience, including service as a city administrator, assistant city manager and city engineer. As the Assistant City Manager – Operations for Spokane, Washington, his departments included Capital Programs Planning/G.I.S., Engineering Services, Real Estate, Building Codes, Environmental Programs, General Services, Planning, Solid Waste Collection and Recycling, Transportation, Wastewater and Stormwater Management, and Water and Hydroelectricity. He joined Baker Tilly as a Management Consultant in 2000 and became the team leader for Management Consulting Services in 2003. Nick has been directly responsible for or involved in numerous organizational management studies, strategic planning, staffing analyses, utility expense and cost analysis studies, fiscal impact studies, as well as in the development of Excel®-based computer models for clients in California, Indiana, Iowa, Kansas, Maryland, Minnesota, Montana, Missouri, Nebraska, New York, North Carolina, North Dakota, Utah, Virginia, Washington, and Wisconsin.</p> <p>Nick holds a master’s degree in business administration, a bachelor’s degree in civil engineering and is a licensed professional engineer in Minnesota and Washington. He is also MSRB Municipal Advisor Series 50 Qualified.</p>
<p><b>Consultant</b></p>	<p><b>David Eisenlohr, Managing Director</b></p>
	<p><b>Qualifications:</b> David has actively supported state and local government performance improvement initiatives for more than 35 years, first as an operational manager and then as a highly regarded management consultant. An insightful analyst and skilled facilitator, David works closely with local elected governing bodies and their senior leadership teams to help them establish strategic clarity, build consensus around priorities, improve organizational performance and streamline business processes and technologies. David’s experience includes strategic, organizational and operational improvement consulting for units of state and local government of all types and sizes. Over the course of his career his strategic planning clients have include large local government organizations such as the City of Kansas City, Missouri and El Paso County, Texas; mid-sized governments such as the cities of Arlington, Texas and Ann Arbor, Michigan, New Hanover County, North Carolina, and the Trinity River Authority; and progressive, upscale communities like Colleyville, Southlake, and University Park, Texas. His experience also includes strategic planning assignments for the Big XII Athletic Conference, the Oklahoma Municipal League, the Government Finance Officers of Texas, and the Arlington Tomorrow Foundation. Before his consulting career, David served in the analytical and performance improvement roles with the City of San Antonio, Texas and as an Assistant City Manager in Grand Prairie, Texas.</p> <p>David earned a Master of Public Administration from the Edwin O. Stene Program at the University of Kansas and a Bachelor of Arts in Political Science from Texas A&amp;M University.</p>
<p><b>Senior Manager</b></p>	<p><b>Mark Winson, P.E.</b></p>
	<p><b>Qualifications:</b> Mark recently joined Baker Tilly as a consultant in our organizational management and operational finance teams. Mark has more than thirty years of management experience including service as a public works director, city engineer, city administrator and director of public utilities. Cities he served include Duluth, Columbia Heights, Mankato and Fridley, Minnesota; and Las Cruces, New Mexico. In addition, he served as the vice president of finance and administration for a college. Mark has been a lead member of strategic planning processes during his career, notably at Las Cruces, MN and Lake Superior College in Duluth, MN and served as key member of Baker Tilly’s strategic planning team for the City of Ankeny, Iowa.</p> <p>Mark has a bachelor’s degree in Civil Engineering and a master’s degree in Strategic Leadership and is a registered professional engineer in Colorado. He is also MSRB Municipal Advisor Series 50 Qualified.</p>

<p><b>Independent Consultant</b></p>	<p><b>Joseph J. Caso Jr., Business Advisor / Business Coach</b></p>
	<p>Joe has gained insight over a thirty+ year career, which has allowed him to successfully launch and maintain steady growth in the businesses he has been associated with, two of which he founded, and includes the following experience: independent business consultant, "big four" and national public accounting, worldwide outplacement, start up and growing company magazine management, financial services and insurance brokerage. Joe's clients all have long- and short-range plans. His role is to help his clients develop a methodology to maintain accountability and consistency with their long term plans which will endure over the long run. He uses a process proven over time to help his clients reach their goals and stay true to their plans. Joe is currently the treasurer of the Greater Key West Chamber of Commerce Board of Directors, chairman of the Economic Affairs Committee of the Chamber, member of the Key West Military Affairs Committee, member of Rotary Club of Key West, trustee of Rotary Foundation Board of Trustees and treasurer of the Key West Golf Club Home- owners Association Board of Directors.</p> <p>Joe resides in Key West where he has built a deep network of friends and business associates. He holds a bachelor's degree in accounting from Fairleigh Dickinson University.</p>
<p><b>Manager</b></p>	<p><b>Matt Stark</b></p>
	<p><b>Qualifications:</b> Matt is a manager with Baker Tilly's human capital advisors group. With the firm since 2002, he applies his analytical expertise to new challenges within the fields of strategic planning, operational finance, organizational management and human resources and economic development. He provides technical and analytical assistance on financial planning models, assists and advises clients on employee classification and compensation systems, performs cost-benefit analyses on economic development projects and is responsible for our electronic facilitation system. Since 2015, Matt has served as the primary analytical resource for Baker Tilly's scientific survey group, applying his talents to survey structure and language, methodology, and analysis of responses.</p> <p>Matt holds a degree in physics.</p>

**Recent projects**

*The following references are directly related in scope and intent to the project effort contemplated by Key West and represent the direct experience of the team members to be assigned to your engagement.*

We encourage you to contact the clients listed below to learn more about the value of their relationship with Baker Tilly. Each may have a different perspective that you may find valuable in relation to your needs.

Baker Tilly staff assigned to this study have considerable experience in conducting strategic planning services to local governments, as well as having direct operational experience. We are currently assisting several clients with strategic planning services including:

- City of Ankeny, Iowa – Strategic Plan
- City of Westminster, Colorado – Strategic Plan
- City of Rowlett, Texas – Strategic Plan
- El Paso County, Texas – Strategic Plan
- Fauquier County Water and Sanitation Authority, Virginia – Strategic Plan
- Fort Wayne City Utilities, Indiana – Strategic Plan



## References

City of Ankeny, Iowa <i>Strategic Planning</i>			
<b>Name</b>	David Jones	<b>Title</b>	City Manager
<b>Phone</b>	515.965.6407	<b>Email</b>	<a href="mailto:djones@ankenyiowa.gov">djones@ankenyiowa.gov</a>
<b>Services</b>	<p>The City of Ankeny has a well-established practice of strategic planning and management. For the 2019 strategic planning process, Baker Tilly was engaged to plan and facilitate an inclusive process involving both the Mayor and City Council, senior executive leaders, and all city department heads to update and redesign the existing strategic plan. The process included the completion of discovery interviews with members of the Council and staff, facilitation of three separate planning workshops for elected leaders and appointed staff, and documentation of results. Outcomes included the review and update of the City's statements of vision, mission and values, development and prioritization of strategic goals, and the identification of key operational objectives supporting the attainment of each goal. Baker Tilly consultants Nick Dragsich, Mark Winson and David Eisenlohr comprised the project team for this assignment.</p>		
City of Westminster, Colorado <i>Strategic Plan (ongoing)</i>			
<b>Name</b>	Kodi Erb	<b>Title</b>	Assistant to the City Manager
<b>Phone</b>	303.658.2001	<b>Email</b>	<a href="mailto:kerb@CityofWestminster.us">kerb@CityofWestminster.us</a>
<b>Services</b>	<p>A first ring suburb of Denver, the City of Westminster is currently engaged in a comprehensive update of the City's strategic plan. Baker Tilly Director David Eisenlohr is leading that effort, along with Mike Conduff of The Elim Group, focused on the establishment and prioritization of strategic goals and objectives based on the policy objectives of the City Council and feedback received through a structured community outreach and engagement process. The project is on a temporary pause as a result of the current COVID-19 pandemic. Tasks completed to date include the development and approval of a detailed project plan, administration and interpretation of individual DiSC profiles with each member of the City Council and senior management team, individual interviews with City Council members and senior staff leaders, and an internal focus group with department directors. Next steps will include the completion of community outreach efforts, the facilitation of a strategic planning retreat for the City Council, and the development of a new strategic plan including the completion of an environmental scan, SWOT analysis, goal prioritization and the preparation of a graphical strategy map.</p>		
City of Rowlett, Texas <i>Community Based Strategic Plan</i>			
<b>Name</b>	Mark McAvoy	<b>Title</b>	Assistant City Manager
<b>Phone</b>	972.412.6113	<b>Email</b>	<a href="mailto:mmcavoy@rowlett.com">mmcavoy@rowlett.com</a>
<b>Services</b>	<p>In 2018, in recognition of Rowlett's emergence as a consequential, forward-leaning community in the greater North Texas region, City leaders recognized an opportunity to update and modernize both the 2005 Strategic Plan and the Realize Rowlett 2020 Comprehensive Plan in companion and complementary efforts. Baker Tilly's David Eisenlohr, then President of The Azimuth Group, Inc., was selected to lead the strategic planning effort, working in close collaboration with the elected and appointed leadership of the City and in partnership with planning and engineering firm Freese Nichols, Inc. The primary goals of the combined planning processes were to recalibrate the City's</p>		

long-range plans – both physical and operational - and to develop a framework to assist the City Council with its policy decisions regarding core services, facilities, and infrastructure. Based a planning approach that included extensive outreach and engagement with the community at large, broad-based involvement of city staff at all levels, direct involvement of the City Council, and oversight by a Council-appointed citizen’s Steering Committee, the updated strategic plan was designed to guide policymakers and municipal managers in setting priorities, focusing energy and resources, strengthening operations, establishing agreement around intended outcomes, measuring results, and assessing and adjusting the City’s direction in response to a changing environment.

**El Paso County, Texas**

*Strategic Planning*

<b>Name</b>	Betsy Keller	<b>Title</b>	Chief Administrator
<b>Phone</b>	915.546.2215	<b>Email</b>	<a href="mailto:BKeller@epcounty.com">BKeller@epcounty.com</a>

**Services** Serving a diverse population of over 800,000 residents, El Paso County is the 8<sup>th</sup> largest County in the State of Texas and is an integral part, along with Ciudad Juarez, of the largest bilingual, binational workforce in the Western Hemisphere. David Eisenlohr, in both 2019 and 2020, has been engaged by the County to design and facilitate a strategic planning processes. The 2019 plan resulted in a complete re-vamping of the County’s strategic plan including creation of an updated vision for the County’s future, revision of the mission statement, and the articulation and prioritization of nine strategic goals. In 2020, David led a process to review progress on the objectives established the prior year, eliminate completed objectives, and refine remaining objectives in light of current conditions and priorities of the governing body. Using online polling software, the top five priorities were identified and ranked for each of the nine goals, creating the strategic foundation for operational planning and resource allocation.

**Fauquier County Water and Sanitation Authority, Virginia**

*Strategic Plan*

<b>Name</b>	Larry Hughes	<b>Title</b>	Interim General Manager
<b>Phone</b>	(703) 819-0914	<b>Email</b>	<a href="mailto:lawrence.hughes703@yahoo.com">lawrence.hughes703@yahoo.com</a>

**Services** Baker Tilly Firm Director Nick Dragisich was a retained to conduct a review of the Authority’s policies, operational effectiveness and efficiency along with organizational structure and staffing levels to assess the operational efficiencies of the Authority, current staff capacity of the organization and to determine how effective the organization was in meeting its mission. The impetus for this study resulted from concerns by the FCWSA Board of Directors that the organization has not kept pace with changes in administrative and operational practices to meet the customers service demands consistently due to recent and long-term leadership issues and current staffing patterns and that future growth and system wide operational needs will further stress the organization and inhibit effective and efficient delivery of services to the Authority’s customers in the future. Springsted identified numerous recommendations for changes in the Authority’s organizational structure, operational practices, and a need for adjustments to staffing patterns in several divisions to ensure the continued efficient delivery of services to the Authority’s customers in the future.

Fort Wayne City Utilities, Indiana			
Strategic Planning and Operational Consulting			
<b>Name</b>	Justin Brugger	<b>Title</b>	Chief Financial Officer
<b>Phone</b>	260.427.2836	<b>Email</b>	<a href="mailto:Justin.brugger@cityoffortwayne.org">Justin.brugger@cityoffortwayne.org</a>
<b>Services</b>	Baker Tilly Firm Director Nick Dragisich was retained to provide strategic planning and consulting services to the Utility's executive leadership team by bringing a broad, external perspective to the generation of a comprehensive strategic planning document to be used by the Utility to track the established goals, objectives, and priorities for the next five years. The developed strategic plan included recommendations to guide key policy, facility, personnel, training, and resource allocation decisions for the designated five-year time period for the plan. The plan included a mission and vision statement, values, strategic initiatives including goals, actions to achieve the goals, measures of success, and an approach to administer the plan		

## Experience

Baker Tilly and the members of the project team assigned to Key West have completed more than 60 organizational studies since 2013 as shown in the table below.

List of relevant projects: 2010 to present				
Year	Client	State	Project	Population
2010	Faribault	MN	City Staff Goal Setting	23,394
2010	Independent School District No. 0191	MN	Strategic Planning	61,434
2010	Johnson County	KS	Strategic Budget Assessment	566,933
2010	Kraus-Anderson Construction Company	MN	Strategic Planning	
2010	MN Assn of County Administrators	MN	Strategic Plan	5,457,000
2011	Carver County	MN	Strategic Plan	89,615
2011	Dakota County	MN	Board Strategic Planning	405,888
2011	Dakota County CDA	MN	Strategic Planning	408,509
2011	Dodge County	MN	Board Strategic Planning	20,087
2012	Adel	IA	Strategic Planning	4,047
2012	Independent School District No. 911	MN	Planning Facilitation	
2012	Local Government Information Systems	MN	Strategic Plan	
2012	Melrose	MN	PUC Retreat	3,601
2012	NAIPFA	IL	Strategic Plan	
2013	Carver	MN	Strategic Planning	4,147
2013	Des Moines Metro Advisory Council	IA	Strategic Planning Session	207,510
2013	Goodhue County Education District	MN	Facility Plan Phase 2	46,464
2013	McLeod County	MN	Board Goal Setting	35,918
2013	Middle Mississippi River Watershed Mgmt Org	MN	Strategic Plan	
2013	MN Natl Assn of Hsg and Redev Officials	MN	Strategic Planning	5,457,000
2013	Nicollet County	MN	Strategic Planning	33,032
2014	Big Lake	MN	Council Work Session	5,200
2014	Des Moines Metro Advisory Council	IA	Strategic Plan Phase II	207,510

List of relevant projects: 2010 to present

Year	Client	State	Project	Population
2014	Farmington	MN	Plan Update	22,167
2014	North Mankato	MN	Dept Head Work Session	13,439
2014	North Saint Paul	MN	Strategic Planning	11,830
2014	Olmsted HRA	MN	Strategic Planning	149,226
2015	Brainerd Lakes Area EDC	MN	Strategic Plan Facilitation	
2015	Carver	MN	Council Retreat	4,147
2015	Hastings	MN	Goal Setting	22,424
2015	Independent School District No. 0013	MN	Open Enrollment Study	19,674
2015	Lexington	MN	Strategic Planning	2,019
2015	New Ulm	MN	Strategic Plan	13,210
2015	Northfield	MN	Council Staff Work Sessions	20,581
2016	Lee's Summit	MO	Strategic Plan	93,184
2017	Fort Wayne City Utilities	IN	Strategic Planning Facilitation & Develop	259,496
2017	Moorhead	MN	Strategic Plan	39,398
2019	Fauquier Co Water and Sanitation Authority	VA	Strategic Plan	
2019	Ankeny	IA	Strategic Planning Assistance	62,417
Current	El Paso County	TX	Strategic Plan	839,238
Current	Westminster	CO	Strategic Plan	113,749



## Required forms

# State of Florida

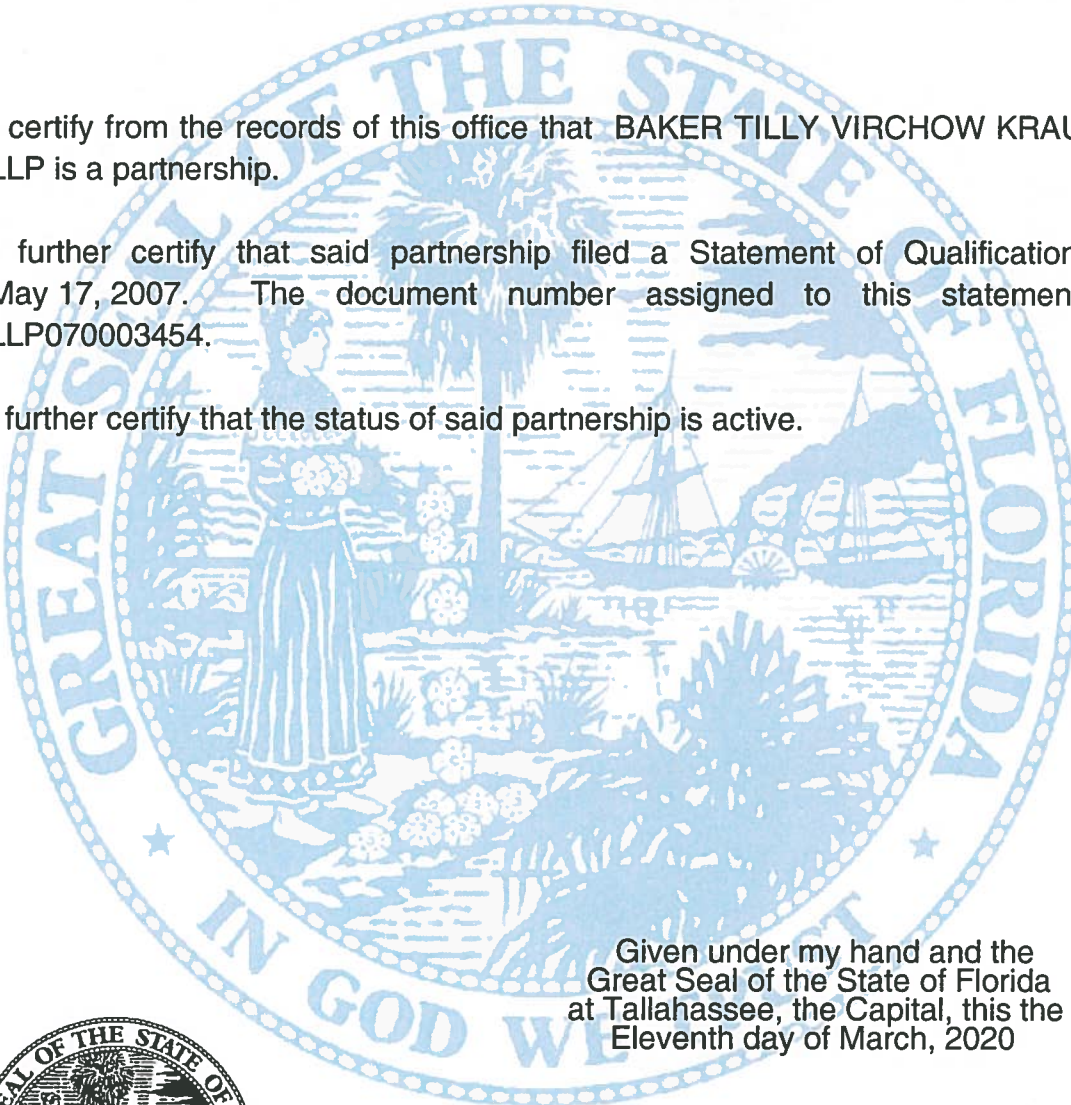


## Department of State

I certify from the records of this office that BAKER TILLY VIRCHOW KRAUSE, LLP is a partnership.

I further certify that said partnership filed a Statement of Qualification on May 17, 2007. The document number assigned to this statement is LLP070003454.

I further certify that the status of said partnership is active.



Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this the  
Eleventh day of March, 2020



*Laurel M. Lee*

Laurel M. Lee

Secretary of State

# PART 2

## FORMS AND AFFIDAVITS

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### PROPOSER'S QUALIFICATION STATEMENT

The undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading.

PROJECT NAME: Strategic Planning Services

SUBMITTED TO: The City of Key West  
1300 White Street  
Key West, FL 33040

SUBMITTED BY:  
Company Name: Baker Tilly Virchow Krause, LLP Corporation   
Company Website: www.bakertilly.com Partnership   
Principle's Name: Bonnie Matson Individual   
Principle's Title: Principal Joint Vent   
Address 1: 380 Jackson Street, Suite 300 Other   
Address 2: St. Paul, MN 55101

Contact Email: bonnie.matson@bakertilly.com

LICENSING:  
State of Florida License No. LLP070003454 Expires \_\_\_\_\_

PROPOSER REFERENCES: List references, including contact name of whom we may call.

Reference List			
Reference	Contact Name	Phone	Email
Please see attached			

I certify under oath that all the information herein is true.

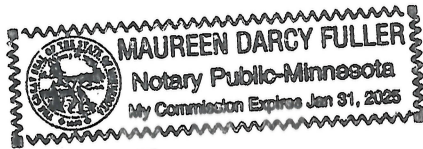
*Bonnie Matson*  
Signature

State of ~~Florida~~ Minnesota  
County of Ramsey

Sworn to (or affirmed) and subscribed before me this 27th day of April, 2020

By Bonnie Matson

(Seal)



Personally Known X  
Produced Identification \_\_\_\_\_  
Type Produced \_\_\_\_\_

*Maureen D Fuller*  
Signature of Notary

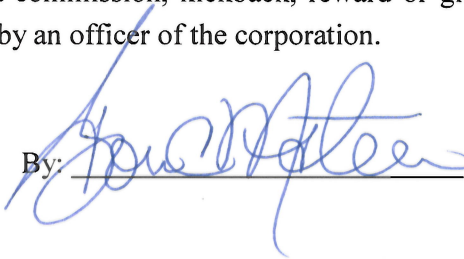
*Maureen D Fuller*  
Print



**ANTI-KICKBACK AFFIDAVIT**


MINNESOTA  
STATE OF ~~FLORIDA~~ )  
RAMSEY : SS  
COUNTY OF ~~MONROE~~ )

I, the undersigned hereby duly sworn, depose and say that no portion of the sum herein bid will be paid to any employees of the City of Key West as a commission, kickback, reward or gift, directly or indirectly by me or any member of my firm or by an officer of the corporation.

By: 

Sworn and subscribed before me this

27th day of April, 2020.

  
NOTARY PUBLIC, State of ~~Florida at Large~~ Minnesota

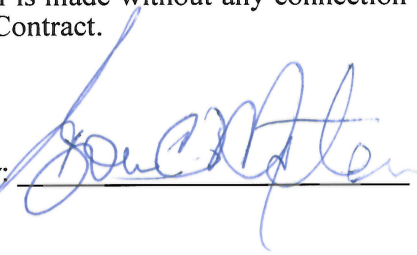
My Commission Expires: 1/31/25



**NON-COLLUSION AFFIDAVIT**


MINNESOTA  
STATE OF ~~FLORIDA~~ )  
RAMSEY : SS  
COUNTY OF ~~MONROE~~ )

I, the undersigned hereby declares that the only persons or parties interested in this Proposal are those named herein, that this Proposal is, in all respects, fair and without fraud, that it is made without collusion with any official of the Owner, and that the Proposal is made without any connection or collusion with any person submitting another Proposal on this Contract.

By: 

Sworn and subscribed before me this

27th day of April, 2020.

  
NOTARY PUBLIC, State of ~~Florida at Large~~ Minnesota

My Commission Expires: 1/31/25



**SWORN STATEMENT UNDER SECTION 287.133(3)(a)  
FLORIDA STATUTES ON PUBLIC ENTITY CRIMES**

**THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICE  
AUTHORIZED TO ADMINISTER OATHS.**

1. This sworn statement is submitted with Bid, Bid or Contract No. RFP # 005-20 for Strategic Planning Services
  
2. This sworn statement is submitted by Baker Tilly Virchow Krause, LLP  
(Name of entity submitting sworn statement)  
  
whose business address is 380 Jackson Street, Suite 300, St. Paul, MN 55101  
  
and (if applicable) its Federal Employer Identification Number (FEIN) is 39-0859910 (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.)
  
3. My name is David MacGillivray and my relationship to  
(Please print name of individual signing)  
  
the entity named above is Principal.
  
4. I understand that a "public entity crime" as defined 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 with the United States, including but not limited to, any Bid 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, material misrepresentation.
  
5. 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 information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
  
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means
  1. A predecessor or successor of a person convicted of a public entity crime: or
  2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
  
7. I understand that a "person" as defined in Paragraph 287.133(1)(8), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter

into a binding contract and which Bids or applies to Bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

8. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

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

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

     There has been a proceeding concerning the conviction before a hearing of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

     The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

     The person or affiliate has not been put on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services.)

David MacGillivray  
(Signature)  
David MacGillivray, Principal

STATE OF Minnesota (Date)

COUNTY OF Ramsey

PERSONALLY, APPEARED BEFORE ME, the undersigned authority,

David MacGillivray  
(Name of individual signing)

who, after first being sworn by me, affixed his/her signature in the

space provided above on this 27th day of April, 2020.



My commission expires: 1/31/2025  
NOTARY PUBLIC

Maureen D Fuller

**INDEMNIFICATION**

To the fullest extent permitted by law, the CONSULTANT expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents, and employees (herein called the "indemnitees") from liabilities, damages, losses and costs, including, but not limited to, reasonable attorney's fees and court costs, such legal expenses to include costs incurred in establishing the indemnification and other rights agreed to in this Paragraph, to persons or property, to the extent caused by the negligence, recklessness, or intentional wrongful misconduct of the CONSULTANT, its Sub-consultants or persons employed or utilized by them in the performance of the Contract. Claims by indemnitees for indemnification shall be limited to the amount of CONSULTANT's insurance or \$1 million per occurrence, whichever is greater. The parties acknowledge that the amount of the indemnity required hereunder bears a reasonable commercial relationship to the Contract and it is part of the project specifications or the bid documents, if any.

The indemnification obligations under the Contract shall not be restricted in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the CONSULTANT under workers' compensation acts, disability benefits acts, or other employee benefits acts, and shall extend to and include any actions brought by or in the name of any employee of the CONSULTANT or of any third party to whom CONSULTANT may subcontract a part or all the Work. This indemnification shall continue beyond the date of completion of the work.

: Baker Tilly Virchow Krause, LLP

SEAL:

380 Jackson St., Ste 300, St. Paul, MN 55101  
Address

*Bonnie Matson*  
Signature

Bonnie Matson  
Print Name

Principal  
Title

April 27, 2020  
Date



*Maureen D Fuller*

**EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT**

STATE OF Minnesota )  
 : SS  
COUNTY OF Ramsey )

I, the undersigned hereby duly sworn, depose and say that the firm of Baker Tilly Virchow Krause, LLP provides benefits to domestic partners of its employees on the same basis as it provides benefits to employees' spouses per City of Key West Ordinance Sec. 2-799.

By: \_\_\_\_\_

Sworn and subscribed before me this

27th day of April, 2020.

Maureen D Fuller

NOTARY PUBLIC, State of Minnesota at Large

My Commission Expires: 1/31/25



**CONE OF SILENCE AFFIDAVIT**

STATE OF Minnesota )  
 : SS  
COUNTY OF Ramsey )

I the undersigned hereby duly sworn depose and say that all owner(s), partners, officers, directors, employees and agents representing the firm of Baker Tilly Virchow Krause, LLP have read and understand the limitations and procedures regarding communications concerning City of Key West issued competitive solicitations pursuant to City of Key West Ordinance Section 2-773 Cone of Silence (attached).

[Handwritten Signature]  
(signature)  
April 27, 2020  
(date)

Sworn and subscribed before me this

27th Day of April, 2020.

[Handwritten Signature: Maureen Darcy Fuller]  
NOTARY PUBLIC, State of Minnesota at Large

My Commission Expires: 1/31/25



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# Pricing

## Value for fees

We have prepared a fee estimate for the City of Key West based on the needs and objectives you have shared with us and our experience conducting similar strategic planning services. Our estimate allows for thorough and insightful advice and services from experienced professionals, providing a high value for fees.

Our proposed dollar amount to facilitate the development and provide a completed strategic plan is **\$185,000**, which includes expenses for travel related costs, facilitating up to 10 focus group/stakeholder meetings, workshops with City Commission and staff and a final presentation to the City Commission. Included is providing on-going monitoring of the implementation of the Strategic Plan and mentoring sessions with staff to facilitate the implementation phase.

## Assumptions

We based our estimate on the assumptions detailed below. Should any of these change during the engagement, we will bring the matter to your attention immediately and prepare a change order detailing the new requirements and corresponding budget impact. We will not undertake additional work without the City's written approval.

Assumptions include:

- Key West will designate a project manager with authority to make project related decisions and to provide logistical and coordination support throughout the planning process. This individual will also assist the team with the assembly of necessary background information, facilitation of interview and strategic planning session scheduling, scheduling and coordinating your review of deliverables and for the coordination of facility arrangements as required, strategic planning workshop, etc.
- The City Commissioners and designated staff will be required for individual discovery interviews during the first phase of the project. These interviews will require between 1 and 1½ hours each.
- The City Commissioners and designated staff will be available to participate in a strategic planning workshop/retreat at an offsite location to be determined.
- Baker Tilly will have access to, and be provided with, electronic or other readily available data without the need to conduct data extraction or comprehensive synthesis
- Information will be provided within the specified timeframes and format
- No significant changes in scope from that outlined in this proposal

## Additional work

Should the City of Key West request and authorize additional work outside the scope of services described in our proposal we would invoice the City at either our standard hourly fees or at an agreed upon fee based on the additional scope requested.



Additional work includes work outside the scope of services as described in this work plan including, but not limited to:

- Work related to a special request
- Additional on-site meetings or presentations
- Additional benchmark comparisons or comparison cities

Title	Hourly Rate
Principal, Partner, Firm Director	\$300
Senior Manager, Director	\$260
Manager, Senior Staff	\$215
Staff	\$160
Support	\$75

**Hourly fees**

**Exceptions**

Notwithstanding anything to the contrary in the RFP, we hereby take exception to Sections 1.04, 1.05, 1.06, & 1.15 of the Insurance Requirements and the Indemnification obligations as currently written. If selected, we will provide the City with a copy of our standard engagement terms for review. Should the City wish to propose alternative terms, incorporate language from the RFP, or proceed solely on this basis of its own format agreement, we would require the ability to propose additional provisions and negotiate mutually acceptable terms and conditions prior to executing a final contract.

The proposed terms are valid for one-hundred and twenty (120) days from the date of submittal.



# Addendum acknowledgement

Baker Tilly acknowledges receipt of addendum 1, addendum 2 and the change of opening date document.