

**A. Cover Page**

# Analytica

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January 13, 2024

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

**Subj: RFP 24-003**  
**Title: Strategic Planning Services**

Dear Sir or Madam:

I am pleased to submit the firm's proposal to provide the requested services. We comply with all the requirements listed in the RFP. The undersigned is authorized to bind the firm to this proposal. The various required forms follow Analytica's main proposal.

With respect to the statement in the RFP regarding prior clients who now may be employed by the City, the firm has worked with Albert Childress during his tenure at the City of Doral.

Receipt of Addendum #1 is hereby acknowledged. As of the above date this proposal was handed to the delivery agent, a review of both Demand Star and the City's website indicated no additional addenda have been published. In the event addenda are issued prior to the due date, but after this response was delivered to the delivery agent, Analytica will send acknowledgement and supplemental data (as needed) via overnight delivery prior to the RFP deadline.

Please do not hesitate to contact me if I can provide any additional information.

Cordially,



Herbert A Marlowe, Jr, Ph.D.  
Principal

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**B. Information Page**

- a. Project: RFP 24-003 Strategic Planning Services
- b. Vendor: Analytica
- c. Contact Person: Herb Marlowe
  - i. Title: Principal
  - ii. Address (Mailing): POB 998, Newberry, FL 32669
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**C. Firm Background**

Analytica provides organizational development services (including strategic planning) to local governments, primarily in Florida but also in Connecticut, Georgia, Ohio, Texas, and South Carolina. One factor that distinguishes the firm is its ability to provide high level strategic planning services expressing a community’s needs, aspirations and values coupled with the detailed implementation of those goals and strategies through processes such as performance evaluation and management, budget integration, financial planning, human resource management systems, public and internal communication approaches, management and leadership development, consensus building and conflict management processes. A second factor which distinguishes the firm is its emphasis in developing a culture that realizes the organization’s values in the framework of “one organization” in which policy-makers, leaders and managers and line staff are all aligned toward the end results expressed in the strategic plan. Finally, the third factor is that Analytica has extensive experience working with communities under high growth and change pressures which are often expressed as concern’s about “losing” our community identity.

*With over thirty years of experience and over 100 developed strategic plans the firm brings the knowledge and experience need to develop a shared community vision, goals and strategies for the distinctive culture and needs of Key West. Some of our projects in the last ten years include the following:*

- A strategic plan for Lee County, Florida to assist it to manage a population of 1 million while protecting the environment and natural features of the County.
- A strategic plan for the City of Doral to assist in managing high population growth, a changing economic base and more diverse culture and the pressures of increasingly unaffordable housing for many residents.
- An updating of the Strategic Plan for the City of DeLand that involved extensive community engagement, and which responded to the community's concerns about losing its identity in a high growth environment, affordable housing, homelessness, walkability/bikeability and expanding services to youth, seniors and previously underserved communities.
- A strategic plan for Flagler County to assist in addressing rapid population growth and the changes needed internally to more effectively address that growth.
- Redesign of the individual performance evaluation system of the City of Round Rock Texas to provide a "line of sight" method through which each employee could view their contribution to the Strategic Plan.
- An efficiency and effectiveness study of Polk County which analyzed County operations from the perspective of increased fiscal pressures coupled with growing service demand. This study identified various technology solutions, process re-design and human resource practices that could assist the County in meeting these challenges.
- An "integrated" strategic plan for the City of San Marcos Texas which represented a collaborative effort of the City, the County, the School Board and Texas State University to address shared issues of youth development, affordable housing and transportation.
- A study of external and internal customer services practices for Charlotte County which identified new processes and practices that have led to increased external customer satisfaction (as measured by a national comparative survey) and self-reported internal communication improvements.

Given page limitations no other specific projects will be mentioned in this space. However the following are the topic areas in which the firm has developed strategic plans and organizational systems to address topics and service areas including: affordable and workforce housing, agriculture, aquaculture, budgeting systems, capital planning, code enforcement, communications, community redevelopment (including CRA's), comprehensive planning, criminal justice, disaster and emergency management, downtown redevelopment, economic

development, environmental (including environmentally sensitive lands purchasing) , fire and EMS, health, homelessness, information technology, human resources, human services, mental health, natural areas protection and sustainable use, post-disaster redevelopment plan (for Monroe County), police, public funding streams, public utilities, purchasing, race, minority, and cultural relations, recreation, arts and culture, substance abuse, transportation and road development, tourism, and water resources.

## **D. Personnel**

### **Herbert Marlowe, Project Manager and Analytica Firm Principal**

Herb brings six skill sets specifically applicable to this project. These are:

Extensive Project Management Experience and Success. Herb has managed well over 100 strategic planning and organizational development projects for local governments ranging in size from Miami-Dade County to small Florida cities. All projects have been accomplished within budget and on-time.

Facilitation, Consensus Building and Conflict Resolution Skills. Herb his a highly skilled facilitator who has assisted local governments to develop high levels of community and internal consensus on complex and controversial topics. He has facilitated resolutions to “water wars”, race riots, land uses and development, as well as the less controversial but still complicated issues of public policy such as mental health and criminal justice, homelessness, and inter-agency conflicts.

Extensive Experience with Elected Bodies. Herb has worked extensively with local government elected officials to help them work more effectively as a body and to provide stable direction for the bodies they govern. He brings a substantive understanding of the dynamics and challenges of being an elected official.

Substantive Florida Public Policy and Practice Knowledge. As noted in the firm background section Herb has extensive knowledge of the both the policy and operational issues facing Florida local governments. He has worked at all levels of local government from policy to front-line in every service that local governments provide. He has extensive experience in local government organizational development including organizational and process design and redesign and systems analysis.

Strong Communication & Listening, Statistical and Writing Skills. Herb speaks frequently in public as well as private settings, minored in advanced statistics as part of his Ph.D. studies and has an extensive publication record of both peer-reviewed scientific articles as well as professional journals. His dissertation focused on social intelligence which requires high levels of listening skills.

Strategic Thinking and Perspectives. Herb's theoretical background is in complex adaptive systems which helps him understand community and organizational dynamics, the processes of organizational change and the emerging issues facing communities based on demographic, economic and environmental factors.

Herb earned his Ph.D. from the University of Florida. His dissertation was on the structure of social intelligence.

### **Mike Sabine, Principal Researcher**

Mike Sabine is a seasoned researcher and experienced data analyst who has worked with Analytica on numerous projects since 2010. Prior to affiliating with Analytica, Mike served as Assistant County Manager for Henry County, Georgia, a fast-growing suburban community in the Atlanta region. Prior to Henry County, Mike served as Assistant County Manager in Spalding County, Georgia, following his promotion there from Community Development Director.

During Mike's professional service career he has worked extensively on service delivery and operational efficacy issues, both in terms of formal analyses as well as in the context of annual budget cycles. Mike helped implement zero based budgeting in Spalding County and worked with the county manager in Henry County to reorganize county government twice in a five year period to better accommodate rapid growth being experienced in that community. At the same time, Mike is highly attuned to the operational needs of a wide array of county services. Mike undertakes a balanced approach to operational analysis, striving to develop and implement sustainable efficiencies that maintain the continuity of service delivery.

As a public entity consultant and analyst affiliated with Analytica, Mike has assisted numerous local governments in the areas of fiscal analysis, community development, economic development, and strategic planning. Completed projects with public entities in both Florida and Georgia. Working with Analytica, served on various projects with the following communities: Brevard County, Florida (fiscal analysis); Lawrenceville, Georgia (economic development consulting); Polk County, Florida (fiscal analysis and program analysis); Hillsborough County, Florida (strategic planning analysis); Pompano Beach, Florida (economic development analysis), and the Florida Developmental Disabilities Council (housing and transportation analysis and environmental scan).

Additionally, Mike served as Energy Efficiency and Conservation Block Grant (EECBG) Administrator for DeLand, Florida, managing successful implementation of a \$1.2M energy efficiency grant in a part-time capacity during 2011-2012. Mike was responsible for project management and overall administration of grant, including resolving conflicts and addressing concerns of city management, agency oversight officials, sub-grant applicants, and vendors.

As Assistant County Manager in Henry County, Mike was responsible for execution of policies and directives for a rapidly growing community of approximately 200,000 with 1400 employees. Duties include direct supervision of assigned departments, including supervision of

physical plant management spanning approximately 30 buildings and 700,000 square feet of space, with direct supervision of the Facilities Management Director. Assist with coordination of annual county budget (then \$200M all funds, \$114 M general fund) with the County Manager, Finance Director, and Budget Director. Earlier in his career as Assistant County Manager in Spalding County, Mike was similarly responsible for execution of policies and directives. Mike received his undergraduate degree from Stetson University in DeLand, Florida and his graduate degree from Emory University in Atlanta.

Organizational Chart. Dr. Marlowe will be the project leader. Mr. Sabine will provide specific services under Dr. Marlowe's supervision.

## **E. References (5)**

**A reference for the City of Doral is included. Since the Key West City Manager was the Manager of Doral at the time of service an additional reference has been provided so that five references can be checked excluding the Doral service should you so choose.**

Organization: City of DeLand

Address: 120 S. Florida Ave, DeLand, FL 32720

Population: 38,000

Contact: Michael Pleus, City Manager

Phone number: 386 626 7109

Email: pleusm@deland.org

Services provided: Community Visioning, Strategic Planning, Organizational Development

Years of service: mid-1990s to 2024

Compensation. Initial strategic plan cost in the mid-1990s was \$35,000. Annual updates have ranged from \$1,500 to \$15,000.

Organization: City of Orange City

Address: 205 E. Graves Ave, Orange City, FL 32763

Population: 13,000

Contact: Dale Arrington, City Manager

Phone number: 386 775 5408

Email: darrington@orangecityfl.gov

Services provided: Strategic Planning

Years of Service: 2018-2024

Compensation: \$5,000 for annual goal setting workshop with City Commission

Impact: Major infrastructure improvements and physical plant additions which were the Commission priorities.

Organization: City of Parkland

Address: 6600 N. University Drive, Parkland, FL 33067

Population: 35,000

Contact: Nancy Morano, City Manager

Phone number: 954 757 4138

Email: nmorando@cityofparkland.org

Services provided: Community survey, strategic plan

Years of service: 2018 to 2024

Compensation. \$75,000 for initial strategic plan which was comparable in scope to the Key West RFP. Compensation for annual updates ranged for \$4,000 to \$20,000.

Impact: Significant land purchases for new parkland which was the priority. Resolution of complex road issues.

Organization: City of Doral

Address: 8401 NW 53<sup>rd</sup> Terrace, Doral, FL 33166

Population: 75,000

Contact: Albert Childress, City Manager. Mr. Childress is now the City Manager of Key West.

Phone number: 305 809 3786, Email: Albert.Childress@cityofkeywest-fl.gov

Services provided: Strategic Planning

Years of service: 2016 to 2022

Compensation ranged from \$12,000 to \$14,000 annually.

Project impact: The City developed a viable downtown transitioning from a golf-course community. The City developed an international presence as a hub for trade.

Organization: Flagler County

Address: 1769 E. Moody Blvd, Bunnell, FL 32110

Population: 120,000

Contact: Heidi Petito, County Administrator

Phone number: 386 313 4001

Email: hpetito@flaglercounty.gov

Services provided: Comprehensive Strategic plan with extensive community outreach.

Years of service: 2022

Compensation: \$75,000

Project impact: Improvement of internal systems to manage significant growth. Airport improvements as economic growth site. Update growth management policies and tools.

Organization: Polk County

Address: 330 W. Church St, Bartow, FL 33831

Population: 725,000

Contact: Todd Bond, Assistant County Manager

Phone number: 863 534 6576

Email: toddbond@polk-county.net

Services provided: Strategic Planning, Organizational Efficiency Study

Years of service: 2015 to 2023

Compensation: Approximately \$600,000 over the years.

Project Impact: Numerous improvements in technology, service expansions, increased federal funding, substantive cost savings via various re-organizations or process change.

## **F. Approach & Methodology**

Leveraging thirty-five years of public entity experience in strategic planning, a five phase method is proposed that integrates all requested tasks set forth in the RFP with Analytica's unparalleled experience in producing over 100 strategic plans since 1987.

Analytica envisions the new strategic plan as the primary vehicle to develop and operationalize mechanisms of action required to move Key West's identified objectives forward. A solid strategic plan is not a laundry list of detailed minutiae. However, a well operationalized strategic plan is one where the general actions necessary to advance the key goals of the plan are identified, along with prospective ways those actions can be subsequently refined and advanced.

### **Phase 1: Listening Activities**

The purpose of this phase is to identify the issues/opportunities facing the City from both a short-term and long-term perspective, the assets it has to address those issue and opportunities and the barriers and gaps it must address with respect to those issues and opportunities. This is commonly called a SWOT analysis.

This phase will occur in five stages. These are:

- Stage 1: Status assessment of current strategic plan
- Stage 2a: Community conversations
- Stage 2b: Linkage with Adaptation Plan
- Stage 3: Four surveys (community, business, youth, employees)
- Stage 4: Community charrette
- Stage 5: City Commission workshop

#### **Stage 1: Status assessment**

The first stage to developing a new strategic plan is to know where Key West resides in the current context. The status of the existing strategic plan will be reviewed with appropriate staff. The purpose is to determine what action steps have been completed, which are underway, which are no longer relevant and what subsequent steps are needed. This assessment will occur through a series of meetings with appropriate staff in which capacity to address current or potential goals are addressed and priorities are discussed. Analytica will also conduct a market due diligence review and assess the city's current economic landscape through an environmental scan of industry databases, public and private agency reports, competitors' analysis, and factors differentiating the City and other indicators of economic vitality. This first stage will also incorporate preparatory meetings as needed with elected officials and appropriate senior members of city staff.



## Stage 2: Community Conversations

This second stage consists of conversations held in various formats with community stakeholders. Questions are asked in these conversations that elicit stakeholder's perspectives about issues, opportunities, assets, barriers while at the same time obtaining an understanding of the culture of Key West and the values important to the community.

In this stage the following activities are proposed:

- Individual and in-person interviews with the City Commission and Senior Staff, specifically including the City Manager.
- The City Commission each name two persons for Analytica to interview, in-person or by phone depending upon their schedule.
- A focus group of 8-to-12-line city employees.
- A focus group of 8 to 12 mid-management city employees.
- A meeting with any city union representatives.
- An in-depth briefing by Budget/Fiscal staff on the financial status of the City.
- An in-depth briefing by Planning staff on projected development either physical or economic.
- A focus group of 6 to 10 tourism-based business representatives, coordinated with the Chamber of Commerce.
- A focus group of 6 to 10 non-tourism-based business representatives, again coordinated with the Chamber of Commerce
- A focus group of 6 to 10 representatives of the cultural non-profit sector.
- A focus group of 6 to 10 representatives of faith communities.
- A focus group of 6 to 10 representatives of non-profit human service entities.
- A meeting or phone interviews with the local school principals.
- A meeting or phone interview with the President of the Community College or a designated representative.
- A meeting or phone interview with the Superintendent of Schools or a designated representative.
- A meeting or phone interview with the CEO of the local hospital.
- A meeting or phone interview with the County Manager of Monroe County.
- A meeting or phone interview with the Chief Resilience Officer of Monroe County.
- Two town hall meetings or structured responsive dialogue sessions (at the mutual discretion of city officials and the consultant) will be held. These events will be open to any interested member of the public and will be held at times most likely to draw engaged participation.

### Stage 2b: Linkage with Adaptation Plan.

Given the significance and potential impact of the Adaptation Plan under development it is important that the Strategic Plan recognize and reflect the possible impact of that plan on

City government. Analytica will meet with and regularly communicate with the persons involved in the development of the Adaptation Plan to ensure consistency and compatibility.

Stage 1 and Stage 2 of Phase 1 specifically incorporates Tasks 3.3.1, 3.3.2, 3.3.3, 3.3.4 and a portion of Task 3.3.5 from the RFP.

### Stage 3: Surveys (Community, Business, Youth, Employees)

The purpose of this stage is severalfold. One is to test many of the topics identified in stages 1 and 2 as to community perception/concern/significance. Second is to identify any topics not identified during stages 1 and 2. Third is develop the information needed to formulate potential future scenarios for Key West in terms of futures the community wants and doesn't want. Fourth is repeat some of the items on the prior so that a baseline of impact or progress can be drawn from comparing past and present data on key topics. By conducting the surveys after Stages 1 and 2 the potential of omitting a significant topic is diminished.

Analytica is proposing four surveys. One is directed at the City as a whole. Three more focused surveys are proposed for the business community, youth, and employees.

Analytica will draft the potential surveys for review by identified staff. Once an acceptable draft is developed it will be reviewed with the City Manager and at the Manager's discretion with the Commission. Once approved, Analytica will work with persons identified by the City to translate it in the various languages needed.

Analytica will coordinate with City staff the various distribution mechanisms to the various groups. The Chamber is proposed as the major mechanism to reach the business community, the school system for youth, the City itself for employees. For the community is it envisioned both a physical distribution at public sites as well as an internet-based version. Analytica has worked with clients in using external survey tools such as Zen-City as well as the City's own website.

Analytica will analyze the survey results into appropriate statistics and tables to determine areas of high or low agreement, priorities, and emerging trends or issues.

#### **Phase 1 - Deliverable 1** from Stages 1-3:

- Summary Report 1.0 – Findings and Scenarios to Date

This report will identify and discuss the following topics:

- The issues and opportunities facing the City which may range from broad themes such as the affordability of housing to specific projects that are needed or desired. (SWOT 1)

- The assets the City possesses to address those issues and opportunities and the barriers it must address in doing so. (SWOT 2)
- The concerns and priorities of residents/stakeholders, business representatives, youth, and employees. Again, these may range from broad themes to site or program specific topics.
- The future scenarios facing the City. These will summarize the longer-term impacts that could occur under various conditions.

This report will be submitted in draft to the City and circulated internally for comment and correction. Based on feedback, version 2.0 of the report will be developed. Stage 3 of Phase 1 specifically incorporates the remainder of Tasks 3.3.5 and preliminary information necessary for Task 3.3.6 set forth in the RFP.

#### Stage 4: Community Vision Session/Charette

This will be an opportunity for interested community members to comment on the version 2.0 of the summary report. Based on those comments, version 3.0 will be produced. There may be multiple sessions on a single day to accommodate various schedules.

#### ***Phase 1 - Deliverable 2: Summary Report 3.0***

#### Stage 5: City Commission Workshop

This workshop will be developed and conducted via the following activities:

- Briefings with the Commission on the Summary Report along with an interview to determine their perspective on goals, key issues to be addressed, their priorities
- Review of the Interview findings with Key Staff
- Design of workshop agenda and workshop process

The Workshop itself is intended to identify goals, priorities, and key projects.

#### ***Phase 1; Deliverable 3: Completed Summary Report***

### **Phase 2: Draft Plan**

In this phase the plan itself will be developed using the phase 1 information. This phase will consist of the following steps:

Step 1.0: Draft 1.0 developed by Analytica. This draft will contain draft statements of the following:

- Vision, Mission, and Value Statements
- Scenario Summaries
- Goals, Strategies and Objectives

Step 2.0: Iterative review with Staff. This step will be conducted remotely with electronic conferences with various staff. Revisions will be drafted post-conversations until accepted by the Manager. This will be produced as Draft 2.0.

Step 3.0: Review with Commission. Draft 2.0 will be reviewed with Commission in person and with the Manager as participant. Any revisions will be issued as Draft 3.0.

Step 4.0: Public comment/Charette. At the discretion of the City, Draft 3.0 will be posted on the City's website for a one-to-two-week period to allow for public and/or a charrette will be held to garner public comment. If appropriate and needed, a Draft 4.0 will be produced after staff consultation.

***Phase 2 Deliverable.*** Draft 4.0 of Strategic Plan

### **Phase 3: Plan Adoption**

In this phase the strategic plan will be finalized and adopted by the City Commission. This phase will consist of the following steps:

Step 1.0. Workshop planning with staff. This will consist of remote conferences regarding agenda, logistics, amount of time needed, prioritization methodology, etc. It will also be determined during this step if there is any need to brief Commissioners on Draft 4.0 should there be an item of substance.

Step 1.A. Commission briefings if needed. This will be done remotely.

Step 2.0 Commission Workshop. This will be a 1-to-2-day workshop based on staff guidance. In it Draft 4.0 will be reviewed and modified as needed. Once modified, a prioritization process will be used to establish the priorities for the upcoming year.

Step 3.0. Strategic Plan Final. Based on the workshop, a Strategic Plan Final will be produced.

Step 4.0. Formal adoption. Should the City so choose the Strategic Plan will be placed on a regular Commission meeting agenda for presentation and adoption.

**Phase 3 Deliverable:** Adopted Strategic Plan, specifically incorporating the final report and presentation detailed in Task 3.3.6.

## **Phase 4: Execution**

The purpose of phase 4 is to develop an internal plan for the accomplishment of the approved and prioritized objectives. This will consist of the following steps (all steps are in-person meetings with appropriate staff).

Step 1: Review and revision if needed of objectives to ensure measurability, specificity, and realistic framing. This step addresses how to determine progress and what indicators will be used to measure both progress and accomplishment as well as ensuring the objective is sufficiently specific and within the power of the City to accomplish.

Step 2: Objectives and time-frame assignment. In this step the objectives are assigned to appropriate departments or individuals and time frames are established.

Step 3: Master PERT chart. The Plan is laid out in an overall time frame to ensure sequence is both realistic and coordinated.

Step 4: Financial Plan. In this step Analytica will work with the Budget Office to develop a funding plan for the Strategic Plan. This of course will overlap with the City's CIP. It will identify existing resources, needed additional resources and any alternative funding sources.

Step 5: Budget Process Implementation. In this step the budget development process of the City will be reviewed to ensure that strategic priorities and the plan in general are addressed during budget development. This step will also address how performance indicators of the strategic plan are integrated into the overall performance assessment component of the budget.

Step 6: Human Resource Impacts. In this step the performance evaluation system of city personnel will be reviewed as to how the accomplishments of the strategic plan can be included.

Step 7: Communication & Agendas. In this step the processes through which progress and status of the Strategic Plan can be communicated both internally and to the public will be reviewed including use of the Agenda as an information tool.

Step 8: Plan Management and Updating. This step will focus on how the plan will be internally managed and updated. There are a variety of performance objectives and discrete performance measures that can be employed to measure plan progress and objective attainment. Analytica will work with appropriate city staff to develop specific performance objectives and associated performance measures.

Commission review	20-21	\$7,000	
Public comment	21-22	0	Costs covered in Step 2.3
<b>Three</b>			
3.1 Workshop Planning	22	0	Costs covered in Step 3.2
3.2 Commission briefings	23	\$8,000	
3.3 Commission workshop	23	0	Costs covered in Step 3.2
3.4 Final plan	24	0	Costs covered in Step 3.2
3.5 Formal adoption	TBD	\$4,000	
<b>Four</b>			
4.1 Review of objectives	24-25	\$7,000	
4.2 Assignments	24-25	0	Costs covered in Step 4.1
4.3 Master PERT Chart	26	\$5,000	
4.4 Financial Plan	26-28	\$3,000	
4.5 Budget Process	26-28	\$9,000	
4.6 HR impacts	26-28	0	Costs covered in Step 4.5
4.7 Communication & Agendas	26-28	0	Costs covered in Step 4.5
4.8 Plan Management	26-28	0	Costs covered in Step 4.5
<b>Five</b>			
Final Report	28-30	\$5,000	
<b>Total Fee</b>		<b>\$109,000</b>	
<b>Includes all travel and other expenses</b>			

## G. Knowledge of Key West

Before discussing the needs and issues related the current strategic plan and other emerging topics, the distinctive culture of Key West merits recognition.

Key West as a community is distinguished by three factors. First, its geographic location. Unless one is going to the Dry Tortugas, Key West is a destination, not a pass-through community. Literally as the “end of the line”, and certainly not digitally isolated, Key West still brings the sense of being separated from the continental United States of America. Second, Key West is very much a live and let live community that welcomes a diverse array of lifestyles. Third, and related to the prior two factors, there is a sense of independence, expressed historically as the “Conch Republic”. For a strategic plan to be effective, it must both mirror and seek to realize the needs, aspirations, and values of the community.

There are multiple critical issues facing the City. Many of these are shared with other municipalities, but often take a distinctive form in Key West. Among these are:

Affordable and workforce housing. This is a challenging issue in every community the firm has worked with in the last five years and a state-wide and national issue. For Key West it represents some special challenges which include:

- Limited land. Unlike many Florida cities, there are not miles of farmland that could be developed. The general inability to employ greenfield development strategies within city limits directly corresponds to the essential need to employ adaptive redevelopment, while still recognizing historic preservation and ecological diversity as intervening factors.
- A highly desirable location. Key West is a signature destination popularized by celebrities ranging from Ernest Hemingway to Jimmy Buffett. Second and third homes, remote work options for highly paid professionals that can work wherever, more demand than supply; all these are elements that place extensive pressure on the supply of, and demand for, existing housing inventory.
- Tourism pressures. In an Airbnb/Vrbo world, there is additional outside competition for housing and a willingness to pay a “vacation” price for residential housing.
- Limited options due to the chain of Keys. Unlike many communities where growth can occur in various directions from center city and thereby provide more affordable options, there is only one way for housing to develop.

Sea-level rise and associated impacts. Rising sea levels portend several prospective impacts on Key West. Increased flooding, loss of natural habitat, infrastructural impacts on roads and streets as well as water and wastewater facilities, along with the possibility of negative economic impact provide a thumbnail sketch of how sea-level rise may continue to impact Key West over the next several decades. Since the average elevation of Key West is 8 ft, Analytica is certainly aware that studies have shown that almost all structures in town face a risk of flooding over the next 30 years. The range of sea level rise projections is up to seven feet by 2100; even mid-range analysis illustrate the risk of several feet of sea level rise over this timeframe. Over 5,000 structures are at an elevation of 3 feet or less representing a property value of 3.4 billion<sup>1</sup> may be potentially at risk, which could lead to adverse impacts on Key West’s tax digest over the intermediate to long-term horizon. (<sup>1</sup> riskfinder.climatecentral.org)

Analytica is certainly aware that the preparation of the Key West Adaptation Plan is taking place simultaneously with this strategic planning process. Analytica will work with the city’s adaptation plan consultant (Tetra Tech), and as applicable any sub-consultants, to integrate activities from the Adaptation Plan presently under development. Analytica anticipates a “whole of government” response to implementing approved actions set forth by the forthcoming Adaption Plan. To the maximum feasible extent afforded by the timeline of developing the Adaption Plan, the new Strategic Plan provides a prime opportunity to visualize the mechanisms of action required for further development of action steps and funding plans.

The cost of wind and flood insurance. A state-wide issue with relevance to the Keys. These costs negatively impact efforts to make housing affordable.

The City's infrastructure and Community facilities. In addition to the challenges of sea-level rise, an array of challenges impact Key West's streets, sidewalks, water quality, water and sewer, stormwater, and solid waste management. In some cases, the issue is aging infrastructure, in others it is demand related impacts; in others it is the need to adopt newer technologies or respond to changing regulations.

Workforce. Local governments across the state face difficulties in hiring and retaining staff. Challenges vary by position with many of the firm's current clients facing high levels of difficulty in securing planning staff and water/wastewater operators. The challenge for those cities with a higher cost of living are particularly difficult. Key West is not exempt from any of these while facing especially difficult challenges due to location, cost of housing, limited spousal options.

Legislative limitations on local authority and other actions affecting local governance. The Florida Legislature regularly adds limitations to the power of local governments. This creates tensions as communities seek to maintain their distinctive identities and culture. One assumption to make about the future is that this trend will continue. The current Form 6 issue is just one example of legislative impact on local government.

Financial constraints. Many of the issues facing the City, particularly infrastructure related, are beyond the immediate financial capacity of the City to address. Long term financial planning is critical to managing service-delivery and infrastructural needs in a dynamic city where the influx of both tourists and increasing sea-level rise both create surge-demand in very unique ways.

Homelessness. While related in many ways to housing affordability, the homelessness issue goes beyond that issue. There are mental health, substance abuse, domestic violence factors also involved. While certainly impactful on homeless persons themselves, homelessness also impacts perceived public safety and the attractiveness of a community.

Mobility. The ability to move easily around one's community and the option to use alternative mobility modes are quality of life factors. Road quality, the amount and capacity of sidewalks, bike paths and public transit options are all factors impacting Key West.

Youth development. While youth feeling limited is almost a universal American experience, living on an island can feel particularly limited. The request for additional youth programming is an example of this experience. In addition to the experience of youth, many families hope their children as adults will reside in their home community. This raises the issue as to whether the local economy can offer the diversity of jobs and professional opportunities. Related to this are housing cost factors regarding whether one's children could afford to live in the City.

## **H. Sworn Statements and Affidavits/Certifications (attached to this proposal)**



**ANTI-KICKBACK AFFIDAVIT**

STATE OF FLORIDA )

: SS

COUNTY OF Alachua )

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: [Signature]

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this day of, 2021, by Herbert miorlowe



[Signature]  
(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil  
(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLDL

NON-COLLUSION AFFIDAVIT

STATE OF FLORIDA )

: SS

COUNTY OF Alachua )

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: [Signature]

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this day of, 20 21, by Herbert MyrLow



[Signature]  
(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil  
(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLDL

**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 OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid or Proposal for \_\_\_\_\_  
RFP 24-003 Strategic Planning Services

2. This sworn statement is submitted by: Herbert Marlone / Anlyne  
(Name of entity submitting sworn statement)

whose business address is: POB 488  
Neskey FL 32669

and (if applicable) its Federal Employer Identification Number (FEIN) is: \_\_\_\_\_  
59-0370787

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement)

3. My name is Herbert Marlone  
(Please print name of individual signing)

and my relationship to the entity named above is: Owner

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 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 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 (indicate which statement applies).

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

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

\_\_\_\_\_ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the

management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list (attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH ONE (1) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR THE CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

LA M  
\_\_\_\_\_  
(Signature)

12/12/24  
\_\_\_\_\_  
(Date)

STATE OF Fla. 60

COUNTY OF Alachua

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this day of, 20 24, by Herbert Marlowe



Scott Masingil  
\_\_\_\_\_  
(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil  
\_\_\_\_\_  
(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLA

**EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT**

STATE OF Florida )

: SS

COUNTY OF Alachua )

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

By: [Signature]

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this day of, 2024, by Herbert Markowe.



[Signature]  
(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil  
(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLA

**CONE OF SILENCE AFFIDAVIT**

Pursuant to City of Key West Code of Ordinances Section 2-773 (attached below)

STATE OF Florida )

: SS

COUNTY OF Alachua )

I, the undersigned hereby duly sworn, depose and say that all owner(s), partners, officers, directors, employees, and agents representing the firm of Analytra have read and understand the limitations and procedures regarding communications concerning City of Key West Code of Ordinances Sec. 2-773 Cone of Silence (attached).

By: [Signature]

Sworn to (or affirmed) and subscribed before me by means of [] physical presence or [] online notarization, this day of, 2024, by Herbert Marlowe.



[Signature]  
(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil  
(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLDL

Sec. 2-773. Cone of Silence.

- a. **Definitions.** For purposes of this section, reference to one gender shall include the other, use of the plural shall include the singular, and use of the singular shall include the plural. The following definitions apply unless the context in which the word or phrase is used requires a different definition:
- (1) **Competitive solicitation** means a formal process by the City of Key West relating to the acquisition of goods or services, which process is intended to provide an equal and open opportunity to qualified persons and entities to be selected to provide the goods or services. Competitive solicitation shall include request for proposals ("RFP"), request for qualifications ("RFQ"), request for letters of interest ("RFLI"), invitation to bid ("ITB") or any other advertised solicitation.
  - (2) **Cone of silence** means a period of time during which there is a prohibition on communication regarding a particular competitive solicitation.
  - (3) **Evaluation or selection committee** means a group of persons appointed or designated by the city to evaluate, rank, select, or make a recommendation regarding a vendor or the vendor's response to the competitive solicitation. A member of such a committee shall be deemed a city official for the purposes of subsection (c) below.
  - (4) **Vendor** means a person or entity that has entered into or that desires to enter into a contract with the City of Key West or that seeks an award from the city to provide goods, perform a service, render an opinion or advice, or make a recommendation related to a competitive solicitation for compensation or other consideration.
  - (5) **Vendor's representative** means an owner, individual, employee, partner, officer, or member of the board of directors of a vendor, or a consultant, lobbyist, or actual or potential subcontractor or sub-consultant who acts at the behest of a vendor in communicating regarding a competitive solicitation.
- b. **Prohibited communications.** A cone of silence shall be in effect during the course of a competitive solicitation and prohibit:
- (1) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and the city's administrative staff including, but not limited to, the city manager and his or her staff;
  - (2) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and the mayor, city commissioners, or their respective staff;
  - (3) Any communication regarding a particular competitive solicitation between a potential vendor or vendor's representative and any member of a city evaluation and/or selection committee; therefore, and
  - (4) Any communication regarding a particular competitive solicitation between the mayor, city commissioners, or their respective staff, and a member of a city evaluation and/or selection committee, therefore.
- c. **Permitted communications.** Notwithstanding the foregoing, nothing contained herein shall prohibit:
- (1) Communication between members of the public who are not vendors or a vendor's representative and any city employee, official or member of the city commission;
  - (2) Communications in writing at any time with any city employee, official or member of the city commission, unless specifically prohibited by the applicable competitive solicitation. (A) However, any written communication must be filed with the city clerk. Any city employee, official or member of the city commission receiving or making any written communication must immediately file it with the city clerk. (B) The city clerk shall include all written communication as part of the agenda item when publishing information related to a particular competitive solicitation;
  - (3) Oral communications at duly noticed pre-bid conferences;



- (4) Oral presentations before publicly noticed evaluation and/or selection committees;
- (5) Contract discussions during any duly noticed public meeting;
- (6) Public presentations made to the city commission or advisory body thereof during any duly noticed public meeting;
- (7) Contract negotiations with city staff following the award of a competitive solicitation by the city commission; or
- (8) Purchases exempt from the competitive process pursuant to section 2-797 of these Code of Ordinances;

d. Procedure.

(1) The cone of silence shall be imposed upon each competitive solicitation at the time of public notice of such solicitation as provided by section 2-826 of this Code. Public notice of the cone of silence shall be included in the notice of the competitive solicitation. The city manager shall issue a written notice of the release of each competitive solicitation to the affected departments, with a copy thereof to each commission member, and shall include in any public solicitation for goods and services a statement disclosing the requirements of this ordinance.

(2) The cone of silence shall terminate at the time the city commission or other authorized body makes final award or gives final approval of a contract, rejects all bids or responses to the competitive solicitation or takes other action which ends the competitive solicitation.

(3) Any city employee, official or member of the city commission that is approached concerning a competitive solicitation while the cone of silence is in effect shall notify such individual of the prohibitions contained in this section. While the cone of silence is in effect, any city employee, official or member of the city commission who is the recipient of any oral communication by a potential vendor or vendor's representative in violation of this section shall create a written record of the event. The record shall indicate the date of such communication, the persons with whom such communication occurred, and a general summation of the communication.

e. Violations/penalties and procedures.

(1) A sworn complaint alleging a violation of this ordinance may be filed with the city attorney's office. In each such instance, an initial investigation shall be performed to determine the existence of a violation. If a violation is found to exist, the penalties and process shall be as provided in section 1-15 of this Code.

(2) In addition to the penalties described herein and otherwise provided by law, a violation of this ordinance shall render the competitive solicitation void at the discretion of the city commission.

(3) Any person who violates a provision of this section shall be prohibited from serving on a City of Key West advisory board, evaluation and/or selection committee.

(4) In addition to any other penalty provided by law, violation of any provision of this ordinance by a City of Key West employee shall subject said employee to disciplinary action up to and including dismissal.

(5) If a vendor is determined to have violated the provisions of this section on two more occasions it shall constitute evidence under City Code section 2- 834 that the vendor is not properly qualified to carry out the obligations or to complete the work contemplated by any new competitive solicitation. The city's purchasing agent shall also commence any available debarment from city work proceeding that may be available upon a finding of two or more violations by a vendor of this section. (Ord. No. 13-11, § 1, 6-18-2013)

**VENDOR CERTIFICATION REGARDING**

**SCRUTINIZED COMPANIES LISTS**

Respondent Vendor Name: Analytics  
Vendor FEIN: 59-073-0787  
Vendor's Authorized Representative Name and Title: Herbert Malone, Principal  
Address: POB 998 Newberg FL 32669  
City: Newberg State: FL Zip: 32669  
Phone Number: 352-339-6090  
Email Address: HERB@ANALYTICA-group.com

Section 287.135(2)(a), Florida Statutes, prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services of any amount if, at the time of contracting or renewal, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, or is engaged in a boycott of Israel. Section 287.135(2)(b), Florida Statutes, further prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services over one million dollars (\$1,000,000) if, at the time of contracting or renewal, the company is on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, both created pursuant to section 215.473, Florida Statutes, or the company is engaged in business operations in Cuba or Syria.

As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above in the section entitled "Respondent Vendor Name" is not listed on either the Scrutinized Companies that Boycott Israel List, Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject such company to civil penalties, attorney's fees, and/or costs and termination of the contract at the option of the awarding governmental entity.

Certified By: Herbert Malone Principal  
*Print Name* *Print Title*  
who is authorized to sign on behalf of the above referenced company.  
Authorized Signature: [Signature]

**CITY OF KEY WEST INDEMNIFICATION FORM**

PROPOSER agrees to protect, defend, indemnify, save and hold harmless The City of Key West, all its Departments, Agencies, Boards, Commissions, officers, City's Consultant, agents, servants and employees, including volunteers, from and against any and all claims, debts, demands, expense and liability arising out of injury or death to any person or the damage, loss of destruction of any property which may occur or in any way grow out of any act or omission of the PROPOSER, its agents, servants, and employees, or any and all costs, expense and/or attorney fees incurred by the City as a result of any claim, demands, and/or causes of action except of those claims, demands, and/or causes of action arising out of the negligence of The City of Key West, all its Departments, Agencies, Boards, Commissions, officers, agents, servants and employees. The PROPOSER agrees to investigate, handle, respond to, provide defense for and defend any such claims, demand, or suit at its sole expense and agrees to bear all other costs and expenses related thereto, even if it (claims, etc.) is groundless, false or fraudulent. The City of Key West does not waive any of its sovereign immunity rights, including but not limited to, those expressed in Section 768.28, Florida Statutes. PROPOSER understands and agrees that any and all liabilities regarding the use of any subcontractor for services related to this agreement shall be borne solely by the PROPOSER. Ten dollars of the consideration paid by the City is acknowledged by PROPOSER as separate, good and sufficient consideration for this indemnification. This indemnification shall be interpreted to comply with Section 725.06 and 725.08, Florida Statutes.

These indemnifications shall survive the term of this agreement. In the event that any action or proceeding is brought against the City of Key West by reason of such claim or demand, PROPOSER shall, upon written notice from the City of Key West, resist and defend such action or proceeding by counsel satisfactory to the City of Key West.

The indemnification provided above shall obligate PROPOSER to defend at its own expense to and through appellate, supplemental or bankruptcy proceeding, or to provide for such defense, at the City of Key West's option, any and all claims of liability and all suits and actions of every name and description covered above which may be brought against the City of Key West whether performed by PROPOSER, or persons employed or utilized by PROPOSER.

The PROPOSER's obligation under this provision shall not be limited in any way by the agreed upon Contract Price as shown in this agreement, or the PROPOSER's limit of or lack of sufficient insurance protection.

[REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK]

PROPOSER: Analytica

Address POB 998

Norway FL 32609

Signature [Handwritten Signature]

Herbert Marlowe

Print Name

12/12/29

Date

Principal

Title

NOTARY FOR THE PROPOSER

STATE OF Florida

COUNTY OF Alachua

The foregoing instrument was acknowledged before me by means [] physical presence or [] online notarization, this day of, 2024, by Herbert Marlowe.



[Handwritten Signature]

(Signature of Notary Public- State of Florida)

(NOTARY SEAL)

Scott Masingil

(Name of Notary Typed, Printed, or Stamped)

Personally Known \_\_\_\_\_ OR Produced Identification

Type of Identification Produced FLDL