

*Proposal Prepared for:*



# CITY OF KEY WEST

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1828

# FLORIDA

**RFP #25-022**  
**State and Federal Lobbying Services**

**THE SOUTHERN GROUP OF FLORIDA AND TSG ADVOCATES**

**Lead Lobbyists: Nicole Kelly and Chase Kroll**

**123 S. Adams Street  
Tallahassee, FL 32301**



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# TAB 1 – COVER LETTER AND EXECUTIVE SUMMARY

December 10, 2025

Lucas Torres-Bull  
Procurement Manager  
City of Key West  
1300 White Street  
Key West, FL 33040

## **Re: Proposal Submission for RFP No. 25-022 State and Federal Lobbying Services**

Dear Mr. Torres-Bull and Members of the Selection Committee,

The Southern Group and TSG Advocates are honored to submit our proposal for RFP No. 25-022 State and Federal Lobbying Services. Over the past six months we have had the privilege of working closely with the City of Key West (the City), providing consistent access, strategic guidance, and actionable solutions to advance the City's priorities. This relationship has reinforced our commitment to serving as trusted partners who deliver both foresight and execution.

Headquartered in Tallahassee, Florida, with offices across the state and in Washington, D.C., our firm has operated for over 26 years. We are organized under the laws of Florida and authorized to conduct business statewide. Governance is provided by a Board of Directors that includes Brian Bautista and Nicole Kelly, ensuring strategic oversight and accountability. Founding partners Daniel Diaz-Balart, Chase Kroll, and Kevin Hoffman also serve as shareholders of TSG Advocates, alongside other principals who guide our bipartisan advocacy. We employ more than 70 lobbyist across our offices, and a copy of our Corporate Charter Registration is in the Appendix.

Our firm is distinguished by its bipartisan reach and ability to navigate complex political and regulatory environments with care and precision. We understand that the City's priorities include environmental protection, housing affordability, and investments in infrastructure require advocacy that resonates across diverse leadership and decision-making bodies. By leveraging strong relationships at both the state and federal levels, we ensure that Key West's objectives are advanced effectively with the flexibility and credibility needed to secure long-term results.

Throughout our engagement we have demonstrated responsiveness and alignment with City leadership, cultivating relationships that position Key West as a respected voice in policy discussions. We pride ourselves on being problem solvers who anticipate challenges, provide clear answers, and deliver practical strategies that move initiatives forward. This history underscores our ability to balance strategic insight with hands on advocacy, ensuring that sensitive issues are addressed with professionalism and measurable outcomes.

We are proud to continue this partnership and reaffirm our commitment to advancing the City of Key West's legislative and funding objectives. Thank you for the opportunity to submit this proposal and for your consideration.

Sincerely,

*Nicole Kelly*  
**Nicole Kelly**  
Lead Lobbyist  
The Southern Group  
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Tallahassee, FL 32301  
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[kelly@thesoutherngroup.com](mailto:kelly@thesoutherngroup.com)

*Chase Kroll*  
**Chase Kroll**  
Lead Lobbyist  
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# Executive Summary



CITY OF KEY WEST  
1828  
FLORIDA

## A PROVEN PARTNER

The City of Key West is represented by The Southern Group and TSG Advocates—its integrated state and federal lobbying team with seamless capabilities across Tallahassee and Washington, D.C. Over the past six months, we have advanced the City's legislative priorities, strengthened relationships with key decision-makers, identified competitive funding pathways, engaged executive agencies, and positioned the City for long-term success. This foundation ensures Key West is fully prepared to capitalize on opportunities across all levels of government.

Our Florida team, **Nicole Kelly, Anna DeCerchio, and Brian Bautista**, brings deep expertise in state appropriations, environmental and resilience policy, affordable housing, and executive branch advocacy. Our federal team, **Chase Kroll, Daniel Diaz-Balart, Kaitlyn Roberts and Kevin Hofmann**, maintains direct access to congressional leadership, committee staff, and federal agencies shaping national funding and regulatory frameworks. This coordinated structure ensures strategic alignment between state and federal efforts so Key West's voice carries weight in the Legislature, Congress, and the executive branch.

Backed by 70+ lobbyists across 12 markets and more than \$1 billion in appropriations secured in 2025, our capacity to deliver meaningful outcomes is proven.

Effective advocacy requires more than access—it requires trust built over time and across political lines. Our team has cultivated bipartisan coalitions that keep Key West's priorities viable regardless of shifting political dynamics, balancing broad policy goals with leadership priorities and regulatory considerations to protect the City's interests.

With The Southern Group and TSG Advocates, Key West has a strategic partner fully invested in its long-term success. We provide biweekly updates, real-time alerts, and in-person briefings to ensure City leadership is informed, aligned, and ready to act. Our role is to anticipate challenges, identify opportunities early, and translate Key West's priorities into real results.

## ADVOCACY LEADERSHIP FOR THE CITY OF KEY WEST



### Proven Record of Delivering Results

- Successfully represented Key West, Monroe County, and nonprofits with measurable outcomes.
- 25+ years of advocacy experience, 70+ lobbyists across 12 markets, 500+ clients represented, and \$780M appropriations in 2025.
- Navigated complex legislative processes with trusted access to decision-makers.



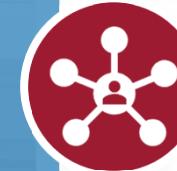
### Bipartisan Relationships and Continuity

- Built and sustained bipartisan coalitions that keep Key West's priorities viable across political cycles.
- Six months of active representation already building momentum on resilience, housing, and infrastructure.
- Trusted to navigate Democratic policy priorities alongside Republican funding and regulatory levers.



### Integrated State and Federal Advocacy

- Florida team led by **Nicole Kelly, Anna DeCerchio, and Brian Bautista** experts in appropriations and environmental policy.
- Federal team led by **Chase Kroll, Kaitlyn Roberts, Daniel Diaz-Balart, and Kevin Hofmann**, with direct access to Congress and agencies.
- Seamless coordination between **Tallahassee and Washington, D.C.** ensures Key West's voice is heard at every level.



### Proactive Communication

- Weekly updates, real-time alerts, and in-person briefings keep City leadership informed and ready to act.
- Continuous monitoring of legislative and regulatory developments provides early positioning before decisions are finalized.
- Transparent reporting to ensure accountability.



### Future Proof Advocacy

- Advance priorities early in legislative and agency agendas to shape outcomes before decisions are finalized.
- Secure long-term appropriations and grants across housing, infrastructure, and coastal resilience.
- Leverage bipartisan relationships to protect Key West's interests regardless of leadership changes.

# TAB 2 – QUALIFICATIONS AND RELEVANT EXPERIENCE

## LEGAL STRUCTURE AND OWNERSHIP

The Southern Group is organized as a corporation and registered in the State of Florida. The firm is privately held, with ownership vested in its shareholders. Governance is provided by a Board of Directors, which includes Brian Bautista and Nicole Kelly, ensuring strategic oversight and accountability.

Executive leadership includes:

- Paul Bradshaw, Chairman
- Rachel Cone, Senior Managing Partner
- James McFaddin, Senior Managing Partner

Founding partners Daniel Diaz-Balart, Chase Kroll, and Kevin Hoffman also serve as shareholders of TSG Advocates, bringing decades of combined experience in litigation, government relations, federal lobbying, and strategic consulting.

### Key West Account Leadership

The City of Key West's account is led by Nicole Kelly at the state level and Chase Kroll at the federal level. Both have been actively engaged with the City over the past six months, building relationships, advancing legislative priorities, and establishing the institutional knowledge necessary for effective long-term advocacy. This leadership continuity, supported by the firm's stable corporate structure, ensures Key West receives consistent, accountable representation across both Tallahassee and Washington, D.C.

TSG Advocates is a limited liability company and is also privately held, with The Southern Group of Florida owning 26%.



In recent years, Leon County had not seen any appropriations. TSG came in late in this year's process and immediately delivered - securing \$2.8 million dollars in funding for critical Leon County, and specifically south side, priorities. That kind of immediate impact speaks volumes. I believe they've earned the opportunity to show what they can accomplish with the full weight of a three-year contract.

**CHRISTIAN CABAN, LEON COUNTY  
COMMISSIONER**



## ADVOCACY TEAM FOR KEY WEST

The City of Key West will be represented by a coordinated advocacy team from The Southern Group and TSG Advocates, working seamlessly to advance the City's interests at both the state and federal level. At the state level, Key West will be supported by Nicole Kelly, Brian Bautista, and Anna DeCerchio, who will serve as the primary point team managing legislative engagement, appropriations strategy, and agency coordination. At the federal level, Key West will be represented in Washington, D.C. by TSG Advocates, led by Chase Knoll, Kaitlyn Roberts, Kevin Hofmann, and Danny Diaz-Balart, who will engage federal

agencies, executive offices, and congressional stakeholders to support the City's grant and funding priorities.

Over the past six months, this unified team has already been active on behalf of Key West, building momentum and relationships in resilience, housing, and infrastructure initiatives. While these individuals serve as the core working group, Key West benefits from the full institutional backing of The Southern Group, Florida's most influential government affairs firm, which means that additional subject-matter experts across our statewide and federal network can be activated at any time to support specific opportunities, technical needs, or rapid response issues.

Together, this team offers more than traditional lobbying services. We serve as a strategic extension of City leadership, aligning expertise in coalition building, appropriations and budget navigation, regulatory coordination, federal grant strategy, and real-time legislative tracking. By leveraging the combined strength of both the state and federal teams, with the ability to draw on the full depth of the firm as needed, we deliver a comprehensive, adaptable, and outcome-focused advocacy strategy that ensures the City of Key West remains competitive, visible, and successful in advancing its priorities.

Biographies of the team members are provided below, and full resumes are included in the Appendix.

## THE SOUTHERN GROUP OF FLORIDA

**Nicole Kelly** leverages more than a decade of legislative experience, strong bipartisan relationships with Florida's legislative leadership, and deep expertise in the appropriations process. She has successfully guided municipalities through budget negotiations and secured key funding for resilience, housing, and infrastructure. Her understanding of legislative strategy and access to decision makers ensures Key West's priorities receive attention in the state budget and policy process.

**Anna DeCerchio** brings extensive executive-branch experience from her service as Chief of Staff at the Florida Department of Environmental Protection and her work in the Executive Office of the Governor. She navigated statewide environmental policy, funding, and regulatory decision making, giving her unique insight into how Florida's executive agencies operate. Her expertise positions Key West to advance resilience, water quality, and conservation priorities within state structures.

**Brian Bautista** brings expertise in appropriations strategy and budget advocacy, with a proven track record of securing millions in funding for transportation, public safety, and community development projects. His ability to navigate committee structures and build bipartisan support is especially valuable for Key West, where resilience and infrastructure priorities require sustained funding streams. Brian's advocacy ensures the City's projects are not only funded but positioned for long-term impact.

## TSG ADVOCATES

**Chase Kroll** leads federal advocacy efforts, maintaining strong connections with the Florida Congressional delegation and key federal agencies. He has guided municipalities through complex federal grant programs and regulatory processes, ensuring local priorities are represented in Washington. For Key West, Chase's expertise in coalition advocacy and national municipal networks amplifies the City's voice on resilience, housing, and infrastructure at the federal level.

**Kaitlyn Roberts** is a legislative strategist focused on tracking and analysis, providing real-time updates and clear recommendations that allow city leaders to act decisively. She develops advocacy materials, including testimony and position papers, which communicate municipal priorities with clarity and impact. For Key West, Kaitlyn's responsiveness and attention to detail ensure that resilience and housing initiatives are advanced with precision and credibility.

**Daniel Diaz-Balart** brings extensive federal advocacy experience and strong relationships across the Florida congressional delegation. As a founding partner of The Southern Group's federal practice, he has represented clients in defense, commercial space, foreign affairs, and federal regulatory matters. His deep connections on Capitol Hill and understanding of federal funding and policy processes ensure Key West's priorities receive strategic attention in Washington.

**Kevin Hofmann** is one of Florida's top political fundraisers and strategists, with national experience beginning on the Mitt Romney 2012 presidential campaign. He has guided fundraising and strategies for major federal and state races, building a powerful donor network. Kevin's political acumen and proven ability to mobilize resources make him a strong asset for generating support and funding for Key West's priorities.

## RELEVANT EXPERIENCE

The Southern Group and TSG Advocates have a long history of providing lobbying and government relations services to municipalities, counties, and public sector-agencies across Florida. Our team has consistently delivered measurable outcomes for communities with challenges and priorities similar to those of the City of Key West, including resilience, infrastructure modernization, housing affordability, and environmental protection.

### State Advocacy and Appropriations

We have successfully advanced appropriations and project funding for Key West and entities in Monroe County, demonstrating our ability to secure resources that directly improve local infrastructure and quality of life. Notable examples include:

- Key West Manhole Lining and Rehabilitation – \$500,000
- Key West Von Phister Street Safety Improvements – \$500,000
- Monroe County Restoration of Memorial Bruce Hall and School – \$3,500,000

Beyond direct municipal representation, our firm has also supported nonprofit organizations based in The Keys, securing funding for projects that strengthen community resilience, housing, water infrastructure, and historic preservation. These efforts further demonstrate our ability to navigate complex funding streams and deliver results for diverse stakeholders:

- Florida Keys Aqueduct Authority Crawl Key Reverse Osmosis Facility – \$7,500,000
- Florida Keys Habitat for Humanity Affordable Housing & Rehabilitation Project – \$250,000
- Pigeon Key Foundation Historic Hurricane Hardening Project – \$250,000
- Pigeon Key Foundation Hurricane Restoration & Protection Project – \$600,000

### Federal Advocacy and Legislative Wins

TSG Advocates brings proven federal capabilities that complement our state practice and expand the resources available to Key West. Recent examples of our federal work include:

- Secured inclusion of targeted provisions in the FY2026 National Defense Authorization Act (NDAA) prioritizing dual use manufacturing initiatives, enhancing federal support for technologies

that bridge commercial and defense applications while strengthening domestic production and supply chain resilience.

- Obtained favorable language in the FY2026 Department of State Authorization Act supporting economic development zones and investment protections, providing critical safeguards and incentives for sustainable growth and international partnerships.
- Mobilized bipartisan cosponsors for legislation advancing law enforcement and public safety technologies, while successfully guiding the bill through markups in both the House Judiciary Committee and the House Ways and Means Committee.

#### **Proven Capacity for the City of Key West**

This record illustrates our capacity to represent clients of similar size, scope, and challenges to the City of Key West. By combining deep relationships with state and federal decision makers, bipartisan credibility, and proven success in securing appropriations and legislative outcomes, we ensure that Key West's priorities are advanced with clarity, influence, and continuity.

## TAB 3 – REFERENCES AND QUALITY OF PAST PERFORMANCE ON SIMILAR PROJECTS

The Southern Group and TSG Advocates have an established record representing municipalities, counties, and public sector clients across Florida. Our work spans infrastructure, housing, resilience, and community development projects, consistently delivering measurable outcomes through appropriations, grant funding, and policy advocacy. The following references below illustrate how we have advanced priorities for communities with challenges comparable to those of the City of Key West. Each engagement demonstrates our capacity to build bipartisan support, secure funding, and navigate legislative and agency processes to achieve results.

### REFERENCES – RELEVANT PAST AND CURRENT ENGAGEMENTS

<b>Leon County</b> <b>Christian Caban, Commissioner</b> <b>850.606.5362, CabanC@leoncountyfl.gov</b>	
<b>Project Start and End Dates</b>	2025 - Present
<b>Description of Lobbying Services</b>	Strategic appropriations planning; bipartisan relationship-building; targeted legislative messaging; resiliency alignment
<b>Legislative or Funding Outcomes</b>	Secured \$2.8M in state appropriations: \$2M State Road 369 widening; \$800K Lake Munson Slough restoration
<b>Governmental Bodies Involved</b>	Florida Department of Transportation (FDOT), Florida Senate Appropriations Committee, Florida House Appropriations Committee, Capital Regional Transportation Planning Agency (CRTPA), Environmental appropriations channels.

<b>Pinellas County</b> <b>Matt Spoor, Assistant County Administrator</b> <b>727.464.5758, mspoor@pinellascounty.org</b>	
<b>Project Start and End Dates</b>	2018 - Present
<b>Description of Lobbying Services</b>	Strategic lobbying on home rule, emergency operations, red tide response, appropriations, and beach renourishment
<b>Legislative or Funding Outcomes</b>	Secured \$24.9M in 2024 session (\$15M Toytown Landfill remediation; \$10M stormwater & joint-use facility); \$1.5M Gladys Douglas Property; over \$30M in project funding overall
<b>Governmental Bodies Involved</b>	Florida Legislature, Federal Agencies

<b>Sarasota County</b> <b>Rob Lewis, Governmental Affairs Manager</b> <b>941.444.9532, lewis@scgov.net</b>	
<b>Project Start and End Dates</b>	2013 - Present
<b>Description of Lobbying Services</b>	Strategic advice and representation on water quality, coastal resilience, transportation, and infrastructure
<b>Legislative or Funding Outcomes</b>	Secured tens of millions for water quality & beach renourishment; \$4M Fruitville Road; \$3.5M McIntosh Road; \$3.2M Dona Bay; \$2M Fire/EMS Academy; multiple \$1M+ coastal/environmental projects
<b>Governmental Bodies Involved</b>	Florida Legislature, Florida DEP

**City of St. Petersburg**  
**David Thompson, Intergovernmental Affairs Director**  
**435.313.5939, David.thompson@stpete.org**

<b>Project Start and End Dates</b>	2022 - Present
<b>Description of Lobbying Services</b>	Strategic representation of county infrastructure and community development priorities
<b>Legislative or Funding Outcomes</b>	<p>Sample Only – Notable Funding for the City of St. Petersburg</p> <ul style="list-style-type: none"> <li>• \$10.6 million for the Outfall Pump Station</li> <li>• \$7.8 million for the Shore Acre Resiliency Infrastructure Project</li> <li>• \$4.7 million for the Southwest Operations and Maintenance Buildings Replacement Project</li> <li>• \$4.1 million for the Northeast Operations and Maintenance Buildings Replacement Project</li> <li>• \$900,000 for the Basin C Resilience Program</li> </ul>
<b>Governmental Bodies Involved</b>	Florida Legislature, Executive Agencies (infrastructure, environmental, transportation)

**Walt Disney World**  
**Adam Babington, Vice President of External Affairs Walt Disney World**  
**407.284.8060, Adam.E.Babington@disney.com**

<b>Project Start and End Dates</b>	2009 - Present
<b>Description of Lobbying Services</b>	Full-service legislative, executive, and local government advocacy, offering strategic policy support and relationship-building to advance priorities.
<b>Legislative or Funding Outcomes</b>	Through strategic advocacy and strong relationships, we have delivered meaningful policy successes while consistently navigating Florida's rapidly evolving political environment.
<b>Governmental Bodies Involved</b>	Florida Legislature, Executive Branch, Executive Agencies & Local Governments

**Putnam County**  
**Sam Sullivan, CPM, Port Manager**  
**Grants, Projects, and Legislative Affairs Coordinator**  
**386.326.2799, sam.sullivan@putnam-fl.gov**

<b>Project Start and End Dates</b>	2024 - Present
<b>Description of Lobbying Services</b>	Strategic representation of county infrastructure and community development priorities
<b>Legislative or Funding Outcomes</b>	Secured \$8.05M in appropriations, including: \$4.2M Waste Water Treatment Expansion; \$2.5M Bardin Bridge Reconstruction; \$750K South Putnam Drainage Enhancement; \$600K Docking Infrastructure (Port Putnam)
<b>Governmental Bodies Involved</b>	Florida Legislature, Executive Agencies (infrastructure, environmental, transportation)

# TAB 4 – PROJECT APPROACH

## UNDERSTANDING THE CITY'S NEEDS

Our advocacy strategy for the City of Key West is built on proactive engagement, targeted relationship development, and continuous monitoring of legislative and funding opportunities. Over the past six months, we have already begun advancing Key West's priorities, and this proposal formalizes a long-term strategy rooted in sustained presence and coordinated state and federal advocacy.

Key West has distinct needs shaped by its geography, tourism-based economy, and environmental vulnerability including storm recovery, affordable and workforce housing, infrastructure modernization, and coastal resiliency. Our approach begins with a clear prioritization of the City's objectives, followed by a focused outreach plan to key legislators, agency leaders, committee staff, and federal stakeholders who influence funding, permitting, and regulatory decisions affecting Key West.

We will maintain continuous communication with state and federal decision makers, ensuring the City's priorities remain visible throughout the year, not only during legislative sessions or grant cycles. By positioning Key West as a proactive partner rather than a reactive requester, we strengthen credibility and increase access to competitive funding streams and policy support.

Our role is to serve as a dedicated strategic representative for Key West, coordinating legislative advocacy, agency engagement, funding pursuit, and stakeholder alignment to deliver tangible results and measurable progress for the City's long-term needs and future planning.

### **Legislative Tracking, Analysis, and Strategic Advocacy**

Bills, resolutions, and agency actions that affect municipalities are monitored daily. Real time analysis and clear recommendations allow City leaders to act decisively. Advocacy is directed to the right decision makers, including committee members, agency officials, and legislative staff, through testimony, position papers, and coalition building.

#### ***Consultation Services***

We can continue to meet with the City Commission and staff as needed and participate in annual workshops to refine legislative priorities. Our team identifies and prioritizes federal and state grant opportunities, coordinates agency meetings, and secures letters of support to strengthen applications. Comprehensive legislative counsel is provided, relationships with officials in the Florida Legislature, U.S. Congress, and executive agencies are maintained, and City personnel receive guidance for appearances before government officials. Proposed changes to formulas, allocations, or regulations are tracked closely, and timelines are developed for initiatives seeking appropriations or legislative support.

### **Development of a City Legislative Platform and Funding Priorities**

Annual workshops with the Commission, Manager's Office, and Attorney provide the opportunity to refine Key West's legislative platform. Priorities in housing, infrastructure, and resilience are translated into a legislative package that guides advocacy throughout the session. This process builds directly on the work already underway and ensures the City speaks with one clear voice.

## **Coordination with City Commission, Manager's Office, and Key Departments**

Strong coordination ensures departmental priorities such as public works, housing, and emergency management are integrated into the broader agenda. Existing relationships with staff and elected officials allow this coordination to continue seamlessly, keeping stakeholders aligned and informed.

## **Communications and Reporting Protocols**

Transparency and accountability remain central to the approach. Weekly calendars of relevant events and issues are provided during session. At the conclusion of each session, a closing report is submitted within one week, followed by a comprehensive final report within 60 days. Outside of session, periodic updates are provided on interim committee meetings, federal rulemaking, and anticipated legislation. Each year concludes with an accomplishments report, presented in person to the City Commission.

## **Interaction with Congressional and Legislative Staff, Agency Officials, and Associations**

Relationships with legislators, staff, and agency officials in Tallahassee and Washington open doors and build support for Key West's priorities. Engagement with the Florida League of Cities, National League of Cities, and other associations amplifies the City's voice through coalition advocacy.

## **Approaches to Securing State and Federal Appropriations, Grants, and Favorable Policy Outcomes**

Competitive grant opportunities and appropriation requests are identified early. Drafting appropriation requests, coordinating letters of support, and lobbying committee members before and during hearings position Key West for success. Current advocacy efforts in resilience and housing will continue, ensuring momentum carries forward into the next cycle.

## **Proposed Work Plan and Timeline**

### **Phase 1: Legislative Platform Development (July to August)**

- Conduct workshops with City leaders.
- Identify and prioritize needs.
- Draft the annual legislative package.

### **Phase 2: Pre Session Preparation (September to October)**

- Monitor pre-filed bills and agency actions.
- Schedule meetings with staff and officials.
- Finalize advocacy materials.

### **Phase 3: Session Advocacy (January to March in even years and March to May in odd years)**

- Attend hearings and sessions in Tallahassee and Washington.
- Provide weekly updates and calendars.
- Testify before committees and coordinate City appearances.

- Build coalitions through associations.

#### **Phase 4: Post Session and Federal Engagement (June to August)**

- Deliver closing and final reports.
- Shift focus on federal appropriations and agency funding cycles.
- Coordinate with Congressional offices and agencies on grants and regulatory issues.

#### **Phase 5: Annual Review (August to September)**

- Present accomplishments report to the Commission.
- Review outcomes and refine strategies for the next cycle.

### **STRATEGIC ADVANTAGE FOR THE CITY OF KEY WEST**

Our framework of relationship building, communication, strategic planning, research, advocacy, appropriations support, collaboration, reporting, and responsiveness directly incorporates the City's requirements and elevates them into a comprehensive strategy for success. By aligning our proven methodology with the City's Scope of Services, we deliver a tailored approach that positions Key West to achieve measurable outcomes and long-term influence.

With TSG, the City gains a seamless extension of its team and a trusted advocate in Tallahassee and Washington, uniquely situated to act immediately as opportunities arise. Our delivery strategy is designed not only to secure immediate priorities in resilience, housing, and infrastructure but also to build sustainable relationships, funding streams, and policy wins that strengthen the City's position for years to come.

## **TAB 5 - OTHER INFORMATION/VALUE-ADDED/LOCAL FAMILIARITY**

### **SERVICE DELIVERY STRATEGY FOR THE CITY OF KEY WEST**

Our team offers more than compliance with the City's formal scope of services; we bring distinctive qualifications and local insight that deliver measurable value to Key West. Over the past six months, we have already represented the City, advancing priorities in resilience, housing, and infrastructure. This continuity ensures that Key West benefits from established relationships and ongoing advocacy efforts.

With longstanding connections across the Florida Legislature, the U.S. Congress, and key agencies, we are positioned to act immediately on opportunities that matter most to the City. Our bipartisan credibility, proven grant strategy, and access to statewide and national municipal networks amplify Key West's voice in Tallahassee, Washington, and coalition settings. Coupled with deep familiarity in Monroe County, we provide not only effective advocacy but also a trusted extension of the City's leadership team, delivering strategies, relationships, and actions focused on long-term influence and measurable results.

### **PAST EXPERIENCE REPRESENTING KEY WEST AND MONROE COUNTY**

Over the past six months, our team has actively represented the City of Key West, advancing priorities in resilience, housing, and infrastructure. This ongoing engagement provides continuity, builds momentum, and demonstrates our ability to deliver tangible results for the City.

In addition to our work with Key West, The Southern Group has supported Monroe County entities and nonprofit organizations throughout the Keys, securing millions of dollars in funding for infrastructure improvements, affordable housing initiatives, and environmental resilience projects. This record reflects both our deep familiarity with local needs and our proven success in navigating complex legislative and funding processes.

Together, these experiences underscore our capacity to represent the City of Key West with credibility, continuity, and measurable impact.

### **EXISTING RELATIONSHIPS WITH FLORIDA LEGISLATURE AND U.S. CONGRESS**

Our team maintains deep relationships throughout the federal and state legislative and executive branches. Whether a decision is made in Tallahassee or Washington, in a legislative chamber or an executive agency, we know the decision makers who shape policy, direct funding, and influence outcomes.

Our bipartisan credibility is a strategic advantage. Trusted across party lines on key policy priorities and connected with legislators who hold critical roles in funding and regulatory decisions, we are uniquely positioned to advance the City of Key West's priorities. Over the past six months, we have represented the City, building momentum on resilience, housing, and infrastructure initiatives. This continuity ensures we are not beginning anew but rather strengthening established relationships and advocacy efforts already in motion.

## SELECTION OF OUR KEY RELATIONSHIPS

### State of Florida

The Southern Group maintains exceptionally strong relationships with key government leaders across Florida. In the Senate, the firm works closely with President Ben Albritton, President-Designate Jim Boyd, and the next slated Senate Presidents, Jay Turnbull and Tom Leek, as well as other members of Senate leadership. In the House, The Southern Group has deep ties with Speaker Daniel Perez, Speaker-Designate Sam Garrison, and future Speakers Jennifer Canady and Mike Rodondo. The firm is also well-connected within the Monroe County delegation through Senator Ana Maria Rodriguez and Representative Jim Mooney. Beyond the Legislature, TSG has cultivated strong relationships with Cabinet-level leaders, including James Uthmeier, Blaise Ingoglia, and Wilton Simpson. The firm also enjoys close relationships with every executive branch agency, with agency leaders only a call away, and maintains particularly strong ties with agencies most relevant to Key West—including DOT, DEP, DEM, FHPC, and FWC—while sustaining relationships with leadership across nearly every executive agency in state government.

### Federal Government

At the federal level, The Southern Group maintains strong relationships with key members of House and Senate leadership, ensuring the City of Key West's priorities are elevated in Washington. Our team works closely with Florida's congressional delegation, including Senators Rick Scott and Ashley Moody, as well as Representative Carlos Gimenez, who represents Monroe County and Key West, and Representative Mario Diaz-Balart, the dean of the Florida delegation. TSG also engages broadly across the delegation and with federal departments and regulatory agencies, giving Key West direct, timely access to decision-makers whose support is essential to advancing the city's needs.

### Our Washington Reach

Our federal team's relationships extend to the White House, cabinet agencies, and the broader executive branch. Our staff's prior service at the highest levels of government provides unique insight and direct access to federal decision-making: Brian Darling served five U.S. Senators; Beau Rothschild served as Chief of Staff in Congress and worked directly with House Republican leadership; Kaitlyn Roberts served in the White House from 2019 to 2023; and Nicholas Raineri served as Senior Advisor at the Office of the Director of National Intelligence and the Department of Defense.

These connections position Key West for direct access to federal funding opportunities, regulatory processes, and policy development.

### Commitment to The City of Key West

We are invested in the City of Key West's future. Every strategy, relationship, and action is directed toward delivering measurable results and lasting influence for the City.

## TOOLS AND PLATFORMS FOR LEGISLATIVE TRACKING AND REPORTING

We employ advanced legislative tracking platforms that monitor bills, resolutions, committee agendas, and agency rulemakings in real time. These tools allow us to provide weekly calendars, timely alerts, and detailed reports tailored to Key West's priorities.

## CAPABILITIES IN GRANT STRATEGY AND AGENCY ENGAGEMENT

Our team identifies and prioritizes competitive grant opportunities at both the state and federal levels. We coordinate agency meetings, prepare letters of support, and develop advocacy strategies that enhance funding success. This proactive approach ensures Key West is positioned early in the funding cycle.

## ACCESS TO NATIONAL AND STATE MUNICIPAL NETWORKS AND COALITIONS

We actively engage with organizations such as the Florida League of Cities and the National League of Cities. These networks amplify Key West's voice and build partnerships that strengthen the City's influence on statewide and national issues.

## PARTNERSHIP VALUE FOR KEY WEST

The strength of our representation lies not only in advocacy but in the added value we bring through continuity, trusted relationships, and local insight. By combining bipartisan credibility with advanced tracking tools, proven grant strategies, and access to statewide and national coalitions, we ensure Key West's priorities are advanced with precision and influence.

Our ongoing work in Monroe County demonstrates that we understand the City's challenges and opportunities at a granular level. This familiarity allows us to anticipate needs, act quickly, and deliver solutions that align with the City's long-term vision. With our team, Key West gains a partner who is deeply invested in its success, committed to representing what is best for the City, and prepared to translate opportunities into measurable outcomes that endure well beyond the legislative cycle.

## DISCLOSURE OF RESOURCES AND CONFLICT OF INTEREST

The Southern Group and TSG Advocates confirm that no additional resources from the City of Key West are required to carry out the services outlined in RFP No. 25-022. We will provide all necessary staff, tools, and expertise to perform and complete the work without reliance on City data access, staff time, or communication systems.

We further disclose that we have no current or former clients whose interests pose a conflict with this engagement. Our firm is committed to maintaining transparency, impartiality, and the highest ethical standards in representing the City of Key West.

## TAB 6 – COST EFFECTIVENESS

### Monthly Retainer / Annual Flat Fee

- **State Lobbying Services:** \$7,500 per month
- **Federal Lobbying Services:** \$12,500 per month
- **Annual Flat Fee Equivalent:** \$90,000 (State) and \$150,000 (Federal)

**Hourly Rates for Additional or As-Needed Services** For services outside the defined scope, such as specialized research, extended drafting, or additional appearances beyond the typical engagement schedule, our hourly rate is **\$250 per hour**.

**Travel, Lodging, and Other Reimbursable Expenses** All fees are inclusive of travel, lodging, labor, equipment, and administrative expenses. No additional charges will be billed to the City unless mutually agreed upon in advance for extraordinary circumstances.

**Total Estimated Annual Cost** Based on the typical scope of work and frequency of engagement at both state and federal levels, the total estimated annual cost is:

- **State Services:** \$90,000
- **Federal Services:** \$150,000
- **Combined Annual Total:** \$240,000

This comprehensive fee structure ensures predictability for the City of Key West while covering all anticipated costs associated with state and federal lobbying services.

# TAB 7 – PROJECT SCHEDULE AND DELIVERABLES

The Southern Group and TSG Advocates will provide the City of Key West with a structured advocacy program supported by consistent reporting and communication throughout the year. Our staffing model ensures availability during session and interim periods, with dedicated team members assigned to monitor legislation, track funding opportunities, and deliver timely updates to City leadership.

## Anticipated Workflows and Deliverables

- **Weekly or biweekly legislative tracking reports during session:** Comprehensive reports on filed bills, amendments, and committee activity, tailored to Key West's priorities.
- **Monthly updates on funding opportunities and agency activity:** Identification of grant programs, appropriations, and agency initiatives relevant to housing, infrastructure, and resilience.
- **Pre-session and post-session reports:** Strategic outlooks before session begins and detailed summaries of legislative outcomes and impacts once session concludes.
- **Realtime alerts on high- priority- or urgent issues:** Immediate communication when legislation or agency action requires City attention or response.
- **In-person or virtual briefings for the City Commission:** Scheduled updates during session and as needed, ensuring elected officials are fully informed and engaged.

## Staffing Availability

Our team will maintain continuous coverage during the legislative cycle, with senior partners and associates available for direct consultation. During interim periods, staff will focus on grant strategy, coalition building, and preparation for upcoming sessions.

## Confirmation of Cost Coverage

All reporting, briefings, and deliverables outlined above are fully included in the proposed fee structure. No additional charges will be incurred for routine reporting, alerts, or scheduled briefings.

# **TAB 8 – LITIGATION**

## **Ownership and Management Structure**

The Southern Group is organized as a corporation registered in the State of Florida. The firm is privately held, with ownership vested in its leadership team. Leadership includes Paul Bradshaw, Chairman; Rachel Cone, Senior Managing Partner; and James McFaddin, Senior Managing Partner. This structure ensures stability, accountability, and continuity of services for public sector- clients.

TSG Advocates is a limited liability company and is also privately held, with The Southern Group of Florida owning 26%.

## **Number of Years in Business and Previous Corporate Names**

The Southern Group has been in continuous operation for more than 26 years. The firm has not operated under any previous corporate names.

## **Experience with Similar Public Sector- Lobbying Engagements**

Our firm has extensive experience representing municipalities, counties, and public sector-agencies across Florida. Engagements have included securing appropriations for infrastructure, housing, and resilience projects; guiding local governments through complex legislative and regulatory processes; and cultivating bipartisan relationships to advance community priorities. Notable examples include Key West infrastructure projects, Monroe County cultural restoration, and advocacy for nonprofit organizations in The Keys.

## **History of Litigation, Claims, or Ethics Violations**

The Southern Group has no history of litigation, claims, or ethics violations related to lobbying, government affairs, or municipal representation.

## **Disclosure of Prior Litigation Involving the City of Key West**

The firm has not been involved in any litigation with the City of Key West.

## **References**

References from at least three public sector- clients are provided in Tab 3 – References & Past Performance.

## **Financial Statements**

As clarified in Addendum 1 to RFP No. 25022, financial statements and financial references for the past three years are not required.

## **TAB 9 – REQUIRED FORMS, DOCUMENTS, AND CERTIFICATIONS**

The following forms are included in this section:

- Anti-Kickback Affidavit
- Public Entity Crimes Form
- City of Key West Indemnification Form
- Equal Benefits for Domestic Partners Affidavit
- Cone of Silence Affidavit
- Non-Collusion Affidavit
- City of Key West E-Verify Affidavit
- Noncoercive Conduct Affidavit
- Scrutinized Companies Certification

We have included on following pages copies of federal and state lobbying licenses for The Southern Group and TSG Advocates, sourced from:

- Florida Lobbyist Registration Office: [www.floridalobbyist.gov](http://www.floridalobbyist.gov)
- U.S. Senate Lobbying Disclosure Database: [ida.senate.gov](http://ida.senate.gov)
- U.S. House Lobbying Disclosure Office: [lobbyingdisclosure.house.gov](http://lobbyingdisclosure.house.gov)

As required by Section 2.4 of the RFP, documentation verifying signature authority is included herein, authorizing Susan van Hoeij to execute this proposal on behalf of The Southern Group of Florida, Inc.

**MEMORANDUM**

**Date:** Oct 28, 2025

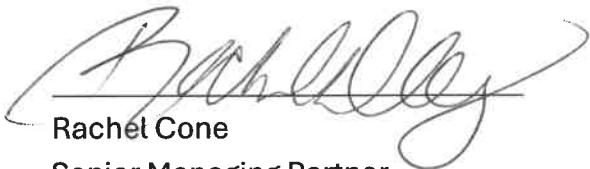
**To:** Rachel Cone and James McFaddin, Officers of The Southern Group of Florida, Inc.

**From:** Handley Mikec

**Subject:** Authorization for Signature Authority

This memorandum serves to authorize Susan van Hoeij to sign documents on behalf of The Southern Group of Florida, Inc. specifically relating to proposals, requests for proposals (RFPs), and other related documents prepared or submitted in the course of the company's business activities.

Ms. van Hoeij is empowered to execute, acknowledge, and deliver such documents as necessary to support the timely and proper submission of proposals and related materials, subject to the policies and directives of the company's leadership.



Rachel Cone  
Senior Managing Partner  
The Southern Group of Florida, Inc.



James McFaddin  
Senior Managing Partner  
The Southern Group of Florida, Inc.

ANTI-KICKBACK AFFIDAVIT

STATE OF Florida)

: SS

COUNTY OF Leon)

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: The Southern Group of Florida, Susan van Heij

Sworn and subscribed before me this 3<sup>rd</sup> day of December 2025

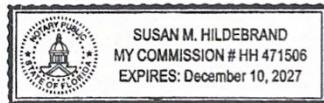
Susan Hildebrand

NOTARY PUBLIC, State of Florida at Large

Susan Hildebrand

My Commission Expires:

12/10/27



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 #25-022

State and Federal Lobbying Services for the City of Key West

2. This sworn statement is submitted by The Southern Group of Florida and TSG Advocates  
(name of entity submitting sworn statement)  
whose business address is 123 S. Adams Street, Tallahassee, FL 32301

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_

59-3584976

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

3. My name is Susan van Hoeij  
(please print name of individual signing)

and my relationship to the entity named above is Proposal Manager

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 guilty, 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. (Please indicate which statement applies).

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, 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.) Not Applicable

Susan Van Hovej  
(signature)

12/3/2025  
(date)

STATE OF Florida

COUNTY OF Leon

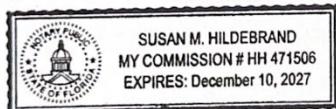
PERSONALLY APPEARED BEFORE ME, the undersigned authority,

Susan Van Hovej who, after first being sworn by me, affixed his/her  
(name of individual signing)

signature in the space provided above on this 3rd day of December, 2025

My commission expires:

Susan Hildebrand  
NOTARY PUBLIC



### CITY OF KEY WEST INDEMNIFICATION FORM

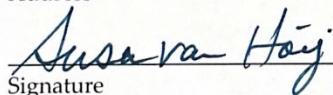
To the fullest extent permitted by law, the Consultant expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents and employees \*(herein called the "indemnitees") from liabilities, damages, losses and costs, including but not limited to, reasonable attorney's 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 Subcontractors 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 of the Work. This indemnification shall continue beyond the date of completion of the work.

CONSULTANT: 123 S. Adams St., Tallahassee, FL 32301

SEAL: N/A

Address

  
Signature

Susan van Hoeij

Print Name

Proposal Manager

Title

DATE:

12/31/2025

EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT

STATE OF Florida)

: SS

COUNTY OF Leon)

I, the undersigned hereby duly sworn, depose and say that the firm of \_\_\_\_\_

The Southern Group of Florida  
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: Susan van Hoeij

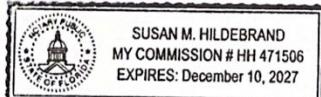
Sworn and subscribed before me this 3<sup>rd</sup> day of December 20 25

Susan Hildebrand

NOTARY PUBLIC, State of Florida at Large

Susan Hildebrand

My Commission Expires:



CONE OF SILENCE AFFIDAVIT

STATE OF Florida )

: SS

COUNTY OF Leon )

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

By: The Southern Group of Florida, Susan van Heij

Sworn and subscribed before me this

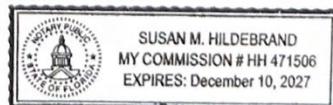
3rd day of December 2025.

Susan Hildebrand

NOTARY PUBLIC, State of Florida at Large

My Commission Expires:

10/10/27



NON-COLLUSION AFFIDAVIT

STATE OF FLORIDA )  
:  
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.

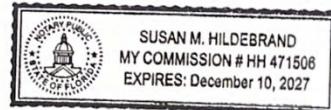
By: Susan van Haej

Sworn and subscribed before me this

3<sup>rd</sup> day of December, 2025  
Susan Hildebrand

NOTARY PUBLIC, State of Florida at Large

My Commission Expires: 12/10/27



### THE CITY OF KEY WEST E-VERIFY AFFIDAVIT

Beginning January 1, 2021, Florida law requires all contractors doing business with The City of Key West to register with and use the E-Verify System in order to verify the work authorization status of all newly hired employees. The City of Key West requires all vendors who are awarded contracts with the City to verify employee eligibility using the E-Verify System. As before, vendors are also required to maintain all I-9 Forms of their employees for the duration of the contract term. To enroll in the E-Verify System, vendors should visit the E-Verify Website located at [www.e-verify.gov](http://www.e-verify.gov).

In accordance with Florida Statute § 448.095, it is the responsibility of the Awarded Vendor to ensure compliance with all applicable E-Verify requirements.

By executing this affidavit, the undersigned contractor verifies it compliance with Florida Statute § 448.095, stating affirmatively that the individual, firm, or corporation which is engaged in the performance of services on behalf of the City of Key West, has registered with, is authorized to use, and uses the U.S. Department of Homeland Security's E-Verify system.

Furthermore, the undersigned contractor agrees that it will continue to use E-Verify throughout the contract period, and should it employ or contract with any subcontractor(s) in connection with the performance of services pursuant to this Agreement with The City of Key West, contractor will secure from such subcontractor(s) similar verification of compliance with Florida Statute § 448.095, by requiring the subcontractor(s) to provide an affidavit attesting that the subcontractor does not employ, or subcontract with, an unauthorized alien. Contractor further agrees to maintain records of such compliance during the duration of the Agreement and provide a copy of each such verification to The City of Key West within five (5) business days of receipt.

Failure to comply with this provision is a material breach of the Agreement and shall result in immediate termination of the Agreement without penalty to the City of Key West. Contractor shall be liable for all costs incurred by the City of Key West to secure replacement Agreement, including but not limited to, any increased costs for the same services, and costs due to delay, and rebidding costs, if applicable.

12/3/2025  
Date

*Susan van Hoeij*  
(Signature of Authorized Representative)

State of Florida,  
County of Leon

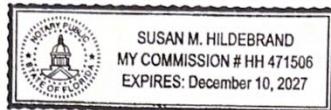
Personally Appeared Before Me, the undersigned authority, Susan van Hoeij whd,  being personally known or  having produced his/her signature in the space provided above on this 31st day of December 20 25.

*Susan M. Hildebrand*

Signature, Notary Public

12/10/27

Commission Expires



Stamp/Seal:

---

**AFFIDAVIT ATTESTING TO NONCOERCIVE CONDUCT  
FOR LABOR OR SERVICES**

Entity/Vendor Name: The Southern Group

Vendor FEIN: 59-3584976

Vendor's Authorized Representative: Susan van Hoeij, Proposal Manager  
(Name and Title)

Address: 123 S. Adams St.

City: Tallahassee State: Florida Zip: 32301

Phone Number: 850.671.4401

Email Address: hoeij@tsgsupportservices.com

As a nongovernmental entity executing, renewing, or extending a contract with a government entity, Vendor is required to provide an affidavit under penalty of perjury attesting that Vendor does not use coercion for labor or services in accordance with Section 787.06, Florida Statutes.

As defined in Section 787.06(2)(a), coercion means:

1. Using or threatening to use physical force against any person;
2. Restraining, isolating, or confining or threatening to restrain, isolate, or confine any person without lawful authority and against her or his will;
3. Using lending or other credit methods to establish a debt by any person when labor or services are pledged as a security for the debt, if the value of the labor or services as reasonably assessed is not applied toward the liquidation of the debt, the length and nature of the labor or service are not respectively limited and defined;
4. Destroying, concealing, removing, confiscating, withholding, or possessing any actual or purported passport, visa, or other immigration document, or any other actual or purported government identification document, of any person;
5. Causing or threatening to cause financial harm to any person;
6. Enticing or luring any person by fraud or deceit; or
7. Providing a controlled substance as outlined in Schedule I or Schedule II of Section 893.03 to any person for the purpose of exploitation of that person.

As a person authorized to sign on behalf of Vendor, I certify under penalties of perjury that Vendor does not use coercion for labor or services in accordance with Section 787.06. Additionally, Vendor has reviewed Section 787.06, Florida Statutes, and agrees to abide by same.

Certified By: Susan van Hoeij, who is authorized to sign on behalf of the above referenced company.

Authorized Signature: Susan van Hoeij

Print Name: Susan van Hoeij

Title: Proposal Manager

**VENDOR CERTIFICATION REGARDING  
SCRUTINIZED COMPANIES LISTS**

Respondent Vendor Name: The Southern Group

Vendor FEIN: 59-3584976

Vendor's Authorized Representative Name and Title: Susan van Hoeij, Proposal Manager

Address: 123 S. Adams St.

City: Tallahassee State: Florida Zip: 32301

Phone Number: 850.671.4401

Email Address: [hoeij@tsgsupportservices.com](mailto:hoeij@tsgsupportservices.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: Susan van Hoeij Proposal Manager

*Print Name*

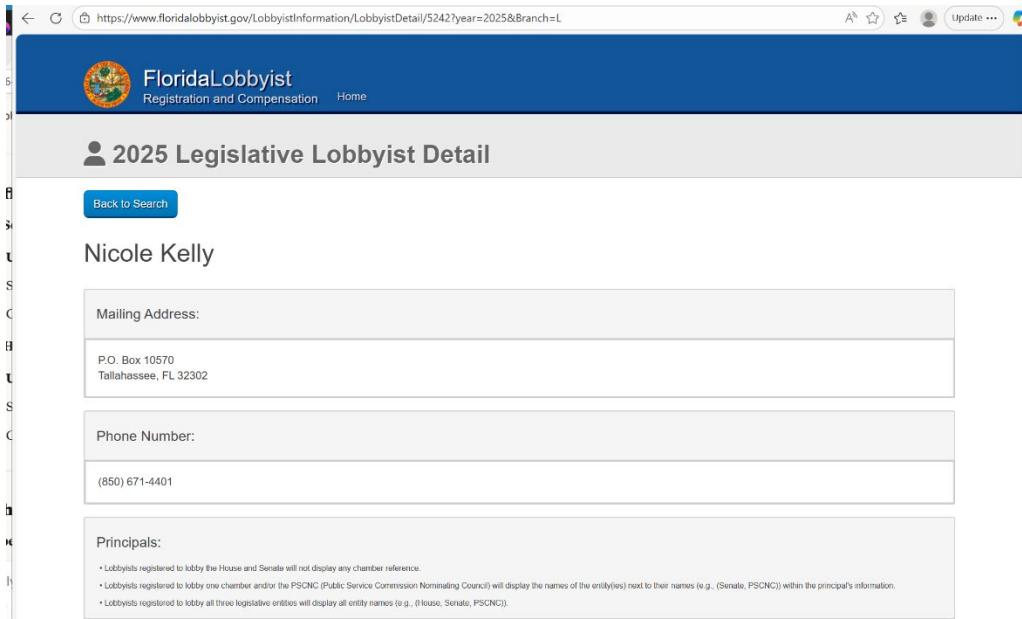
*Print Title*

who is authorized to sign on behalf of the above referenced company.

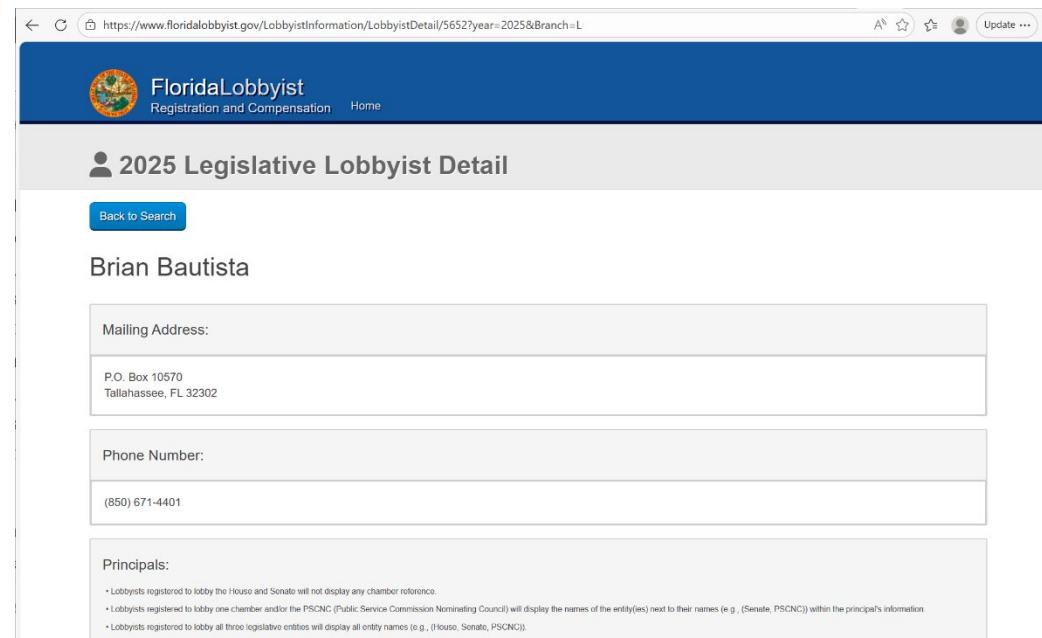
Authorized Signature: *Susan van Hoeij*.

## THE SOUTHERN GROUP FLORIDA LOBBYING LICENSES

Nicole Kelly, Brian Bautista, and Anna DeCerchio are registered lobbyists with the State of Florida. Their credentials are on file with the Florida Lobbyist Registration Office and may be verified at [www.floridalobbyist.gov](https://www.floridalobbyist.gov). Copies of their registrations are provided below.



The screenshot shows the FloridaLobbyist website with the URL <https://www.floridalobbyist.gov/LobbyistInformation/LobbyistDetail/5242?year=2025&Branch=L>. The page title is "2025 Legislative Lobbyist Detail" for Nicole Kelly. The page displays her mailing address as "P.O. Box 10570 Tallahassee, FL 32302" and her phone number as "(850) 671-4401". The "Principals" section notes that lobbyists registered to lobby the House and Senate will not display any chamber reference, while those registered to lobby one chamber or the PSCNC will display the names of the entity(ies) next to their names, and those registered to lobby all three legislative entities will display all entity names.



The screenshot shows the FloridaLobbyist website with the URL <https://www.floridalobbyist.gov/LobbyistInformation/LobbyistDetail/5652?year=2025&Branch=L>. The page title is "2025 Legislative Lobbyist Detail" for Brian Bautista. The page displays his mailing address as "P.O. Box 10570 Tallahassee, FL 32302" and his phone number as "(850) 671-4401". The "Principals" section notes that lobbyists registered to lobby the House and Senate will not display any chamber reference, while those registered to lobby one chamber or the PSCNC will display the names of the entity(ies) next to their names, and those registered to lobby all three legislative entities will display all entity names.

← X https://www.floridalobbyist.gov/LobbyistInformation/LobbyistDetail/7064?year=2025&Branch=L

FloridaLobbyist  
Registration and Compensation Home

## 2025 Legislative Lobbyist Detail

[Back to Search](#)

### Anna DeCerchio

Mailing Address:

P.O. Box 10570  
Tallahassee, FL 32302

Phone Number:

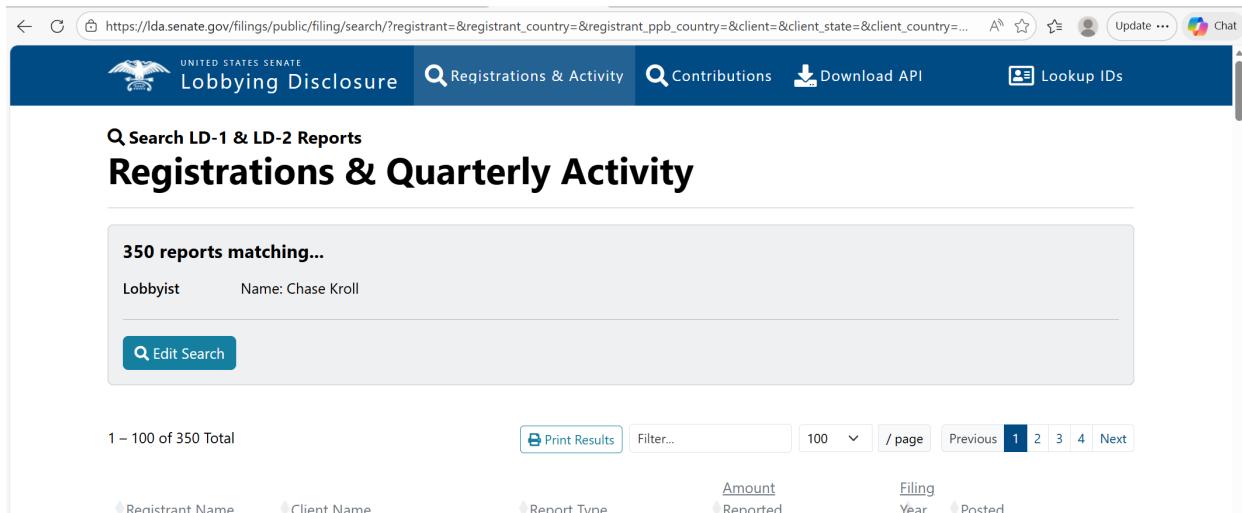
(850) 671-4401

**Principals:**

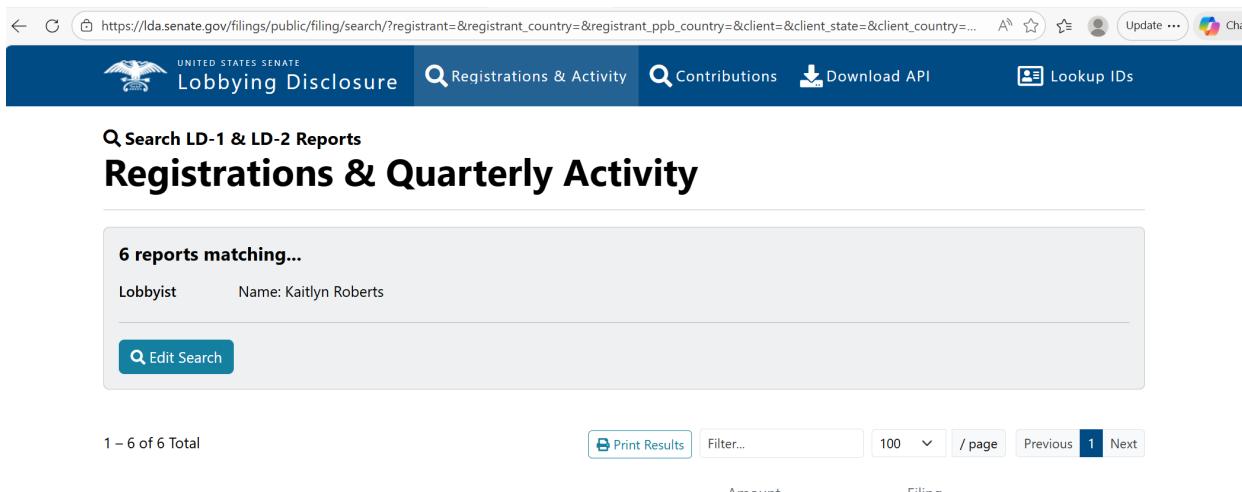
• Lobbyists registered to lobby the House and Senate will not display any chamber reference.  
• Lobbyists registered to lobby one chamber and/or the PSCNC (Public Service Commission Nominating Council) will display the names of the entity(ies) next to their names (e.g., (Senate, PSCNC)) within the principal's information.  
• Lobbyists registered to lobby all three legislative entities will display all entity names (e.g., (House, Senate, PSCNC)).

## FEDERAL LICENSES AND REGISTRATIONS

Chase Kroll, Kaitlyn Roberts, Daniel Diaz-Balart, and Kevin Hofmann are registered federal lobbyists with credentials on file with the U.S. Senate Office of Public Records, verifiable at [lda.senate.gov](https://lda.senate.gov). Additionally, TSG Advocates is registered with the U.S. House of Representatives Lobbying Disclosure Office, verifiable at [lobbyingdisclosure.house.gov](https://lobbyingdisclosure.house.gov). Copies of all registrations are provided below.



The screenshot shows the "Registrations & Quarterly Activity" page on the Senate Lobbying Disclosure website. The search results for "Chase Kroll" show 350 reports matching. The results table includes columns for Registrant Name, Client Name, Report Type, Amount Reported, Filing Year, and Posted. The results are paginated from 1 to 4.



The screenshot shows the "Registrations & Quarterly Activity" page on the Senate Lobbying Disclosure website. The search results for "Kaitlyn Roberts" show 6 reports matching. The results table includes columns for Registrant Name, Client Name, Report Type, Amount Reported, Filing Year, and Posted. The results are paginated from 1 to 1.

UNITED STATES SENATE  
Lobbying Disclosure

Registrations & Activity Contributions Download API Lookup IDs

Search LD-1 & LD-2 Reports

## Registrations & Quarterly Activity

42 reports matching...

Lobbyist Name: Daniel Diaz-Balart

[Edit Search](#)

1 – 42 of 42 Total

[Print Results](#) Filter... 100 / page Previous 1 Next

UNITED STATES SENATE  
Lobbying Disclosure

Registrations & Activity Contributions Download API Lookup IDs

Search LD-1 & LD-2 Reports

## Registrations & Quarterly Activity

84 reports matching...

Lobbyist Name: Kevin Hofmann

[Edit Search](#)

1 – 84 of 84 Total

[Print Results](#) Filter... 100 / page Previous 1 Next

Amount

Filing

UNITED STATES SENATE  
Lobbying Disclosure

Registrations & Activity Contributions Download API Lookup IDs

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U.S. HOUSE OF REPRESENTATIVES

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Registrant Name TSG ADVOCATES DC, LLC	Registrant ID 66883
Client Name	House ID

## APPENDIX

# **Appendix**

**Appendix 1 – Resumes**

**Appendix 2 – Addendum**

**Appendix 3 – Florida State Certification for The Southern Group**



# Nicole Kelly

Nicole Kelly is a dynamic force in Florida lobbying, seamlessly blending policy expertise, strategic insight, and fundraising acumen to deliver results for her clients. Since joining The Southern Group's Tallahassee office in 2021, she has been instrumental in guiding top-tier clients through the complexities of the appropriations process and high-stakes policy negotiations. With over a decade of experience in government affairs, Nicole has built a reputation as a relentless advocate and trusted strategist, ensuring her clients are at the center of Florida's most critical legislative discussions.

Nicole's expertise spans a wide range of policy areas, including property insurance, healthcare, and appropriations, making her a highly sought-after consultant across multiple industries. Beyond policy, she is also a key player in political fundraising, building strong relationships with legislative leaders and key decision-makers.

Throughout her career, Nicole has cultivated and fortified relationships with some of Florida's most influential policymakers, allowing her to navigate complex political landscapes with precision. Her ability to turn challenges into opportunities, anticipate political shifts, and execute winning strategies has solidified her standing as one of the most effective lobbyists in the state.

A Tallahassee native, Nicole earned her BA in political science and sociology from Florida State University in 2011, reinforcing her deep-rooted passion for public policy and government affairs. She continues to make a lasting impact while residing in her hometown with her husband and two children. With her sharp political instincts, unparalleled work ethic, and expertise in both policy and fundraising, Nicole Kelly is a formidable force in Florida politics.

 kelly@thesoutherngroup.com

 850.671.4401

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**Let us show you how.**



# Brian Bautista

Brian is a partner in The Southern Group's Tallahassee office, specializing in emerging industries. An attorney, Brian combines political acumen with legal experience to successfully shepherd priorities of the firm's clients. Brian has experience working on issues related to technology, tourism, healthcare, land use development, affordable housing, cannabis, and utilities and energy.

Brian was recognized by Florida Politics as one of Florida's "30 Under 30" and named a #NextGeneration Rising Star by Influence Magazine.

Originally from Cape Coral, Florida, Brian joined The Southern Group in 2014 and received his bachelors and JD degrees from Florida State University. Brian and his wife, Savanna and their two sons reside in Tallahassee.

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# Anna DeCerchio

Before joining The Southern Group, Anna spent nearly a decade in state government, serving in various roles in both the executive and legislative branches and advising leadership in the highest levels of government.

Anna has served in key leadership roles throughout Governor Ron DeSantis' administration. She began her tenure in the Executive Office of the Governor as Deputy Policy Director, where she worked closely with the Office of Policy and Budget, executive agencies and stakeholders to research and develop policy initiatives, executive orders, and budget priorities.

She was later promoted to Deputy Chief of Staff where she served as a senior policy advisor to Governor Ron DeSantis, managing and providing policy direction to numerous state and governmental agencies, including the Department of Environmental Protection and the state's five water management districts, the Department of Transportation, the Department of Management Services, the Department of Business and Professional Regulation, the Fish and Wildlife Conservation Commission, the Department of Citrus and the Public Service Commission. While serving in this role, Anna worked extensively with agency leadership and advised on agency priorities, budget and policy initiatives, legislative strategy and executive appointments.

Most recently, Anna served as the Chief of Staff at the Florida Department of Environmental Protection, where she managed day-to-day operations and worked to implement the Governor's policy and budget priorities, including historic investments in preserving and protecting Florida's unique natural resources. In this role, Anna oversaw and managed an agency staff of over 4,000 employees and a budget of over \$3 billion, the largest in agency history.

Anna began her career in government in the Florida Legislature, where she worked as a Legislative Aide to Speaker Paul Renner. During her time in this role, she worked closely with legislative members, staff, stakeholders and constituents to guide Speaker Renner's policy and budget priorities through the legislative process.

Originally from Tallahassee, Anna has a Bachelor of Arts degree in History and Political Science from the University of Florida. In 2024, Anna was recognized as one of the University of Florida's 40 Gators Under 40 Outstanding Young Alumni. She has a Juris Doctor from the Florida State University College of Law, where she graduated in the top ten percent of her class. Anna is a current member of the Florida Bar.

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# Chase Kroll

Chase brings a multidisciplinary approach to advocacy on behalf of U.S. and international clients. Having run major political campaigns, legislative operations, and integrated lobbying efforts in Washington, D.C., he delivers advocacy, access, and influence informed by real-world experience in both politics and policy.

Chase is a founding partner of TSG Advocates, The Southern Group's federal lobbying practice in Washington, D.C. Before joining TSG Advocates, Chase worked at Hogan Lovells, where he represented foreign governments and Fortune 500 companies, providing strategic communications, and government relations services. Earlier in his career, he ran his own lobbying and consulting firm and was Vice President at Go BIG Media, an award-winning digital media, communications, and political consulting firm. He has led successful advocacy and PR campaigns for top-tier defense contractors, national trade associations, and nonprofits, advising clients on lobbying, media relations, and communications strategies.

Chase also secured significant federal wins for defense contractors and municipal clients as a lobbyist at David Turch & Associates. On Capitol Hill, he served as a legislative advisor to a high-profile member of Congress and held leadership positions on several federal campaigns, including managing what was then the most expensive winning House race in history. In 2018, Chase was selected for the 40 under 40 award by the American Association of Political Consultants.

Chase earned a bachelors in political science from Saint John's University and a masters in global security studies from Johns Hopkins University. He is originally from Minnesota and now resides in Washington, D.C. with his wife, Jennifer, and their three children.

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 (202) 792-5010

# Kaitlyn Roberts

Kaitlyn Roberts brings a sharp political instinct and a decade of experience in federal policy and strategic communications to TSG Advocates. Having served in the first Trump administration, she offers clients a deep understanding of government operations and a proven ability to navigate complex policy environments at the national level.

Kaitlyn began her career in public service with roles in the offices of Texas Lt. Governor Dan Patrick and U.S. Senator Ted Cruz, followed by a White House internship in 2018. She later joined the staff of Congressman Kevin Brady, then-Chairman of the House Ways and Means Committee, where she supported legislative initiatives and stakeholder engagement.

From 2019 to 2023, Kaitlyn served in a nonpartisan role at the White House under two administrations, contributing to cross-agency efforts focused on intergovernmental coordination and federal policy implementation.

She holds a Master's in International Relations from Harvard University, where she concentrated on global diplomacy and public policy, building on her undergraduate studies in Corporate Communications at the University of Texas at Austin.

Most recently, Kaitlyn advised Aramco's Washington office, leading on regulatory strategy, geopolitical analysis, and enterprise-level engagement across key U.S. and international stakeholders.

She now leverages her broad experience and deep institutional insight to deliver results-driven advocacy for clients navigating the intersection of policy, business, and public impact.

Kaitlyn is located in Washington, D.C.



# Daniel Diaz-Balart

Daniel Diaz-Balart is an experienced trial lawyer, government relations expert and consultant. A fourth-generation lawyer, Daniel began his professional career as a prosecutor in Miami-Dade County. Thereafter he joined one of South Florida's most prestigious civil litigation law firms. In 2017, he founded Diaz-Balart Law, with a focus on government relations, strategic consulting, and complex civil litigation. Daniel grew his practice to include a broad portfolio of domestic and international clients, utilizing his unique skills and training to help them achieve strategic goals at the national and local levels. He has successfully advocated for large and small businesses, foreign governments, and non-profit organizations.

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It has been one of Daniel's greatest honors to be able to represent distinguished domestic and international clients together with his father, former Congressman Lincoln Diaz-Balart, who represented South Florida in the U.S. House of Representatives from 1993-2011.

As a founding partner of TSG Advocates, Daniel brings a unique background and skillset that sets him apart and allows him to consistently achieve excellent results for his clients.

Daniel sits on the Board of Directors of the Congressional Hispanic Leadership Institute ("CHLI") in Washington, DC, the premier organization founded by Members of Congress to advance the Hispanic Community's economic progress and diversity of thought.

Daniel is married to Estefania and together they have two sons, Lincoln and Edwin.



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

 (202) 792-5010

# Kevin Hofmann

Kevin Hofmann joined The Southern Group's Jacksonville office after an impressive career in political fundraising and campaign strategy. He brings a wealth of governmental and political knowledge and connections.

Kevin's experience with political fundraising started at the federal level, working as a fundraising consultant for the Romney for President campaign. As his career grew, he developed a niche for federal and state races, serving on a long list of major campaigns, including congressional races for Mike Walz, John Rutherford, Mario Diaz-Balart, and Byron Donalds, Senate races for Rick Scott and Marco Rubio, and gubernatorial races for Ron DeSantis and Rick Scott.

"Since 2018, Kevin has been an integral part of my team and used his network to help Floridians across the state. Kevin is principled, hardworking, and passionate about delivering results," said Congressman Waltz, a retired Green Beret serving Florida's 6th Congressional District.

Kevin founded The Archmann Group in 2017 as a full-service political fundraising firm. The Archmann Group provides clients with donor research, introductions, and relationship building, and event planning and management. The Archmann Group has led various fundraising campaigns, from local sheriff's races to federal races.

Before starting his firm, Kevin served as the Finance Director of the Republican Party of Florida under Governor Rick Scott. In that role, Kevin developed and implemented a fundraising plan that generated millions for the Republican Party of Florida.

"I had the opportunity to work with Kevin when he was on my campaign team. He is a hardworking and dynamic individual," said Scott, now a U.S. Senator.

Kevin is a veteran of the United States Marine Corps. He is active in various Pro-Veteran groups, including Frontline Patriots, and is passionate about building community engagement for veterans.

Kevin resides with his wife and five children in Ponte Vedra, FL.



**ADDENDUM NO. 1**  
**State and Federal Lobbying Services**  
**RFP 25-022**

This addendum is issued as supplemental information to the Request for Proposal package for clarification of certain matters of both a general and a technical nature. The referenced Request for Proposal package is hereby amended in accordance with the following items:

- 1. Clarification:** [No Changes]
- 2. Changes to Submission Requirements:** [No Changes]
- 3. Updates to Project Timeline:**
  - 1) Bids for RFP 25-022 are due on December 10, 2025, at 2:30 PM and shall be submitted to 1300 White Street, Key West, Florida 33040.**
- 4. Responses to Questions:** [No Changes]
- 5. Additional Resources:** [No Changes]

Susan van Hoeij, Proposal Manager

Susan van Hoeij

Signature

The Southern Group

Name of Business



**ADDENDUM NO. 2**  
**State and Federal Lobbying Services**  
**RFP 25-022**

This addendum is issued as supplemental information to the Request for Proposal package for clarification of certain matters of both a general and a technical nature. The referenced Request for Proposal package is hereby amended in accordance with the following items:

1. **Clarification:** [No Changes]
2. **Changes to Submission Requirements:** [No Changes]
3. **Updates to Project Timeline:**
  - 1) Requests for Information (RFI) are due to the City by November 26, 2025 @ 3:00 PM (Local Time), the City will respond by November 28, 2025 @ 3:00PM (Local Time).
4. **Responses to Questions:**
  1. **Question Due Date** – The solicitation lists the deadline for vendor questions as September 26, 2025. Since the RFP was posted in November, can you confirm whether that date is correct, or if there is an updated deadline for submitting questions?
    1. **Answer:** Questions are due to the City by November 26, 2025 @ 3:00 PM (Local Time)
  2. **References Requirement (Page 27)** – The RFP states that proposers must provide references from at least three clients *and* three credit or financial institutions. Could you please confirm whether both categories are required, or if client references alone will satisfy the requirement?
    1. **Answer:** Proposers should only turn in three client references, the city does not need any financial institutions reference.
5. **Additional Resources:** [No Changes]

Susan van Hooij  
Signature

The Southern Group  
Name of Business



**ADDENDUM NO. 3**  
**State and Federal Lobbying Services**  
**RFP 25-022**

This addendum is issued as supplemental information to the Request for Proposal package for clarification of certain matters of both a general and a technical nature. The referenced Request for Proposal package is hereby amended in accordance with the following items:

1. **Clarification:** [No Changes]
2. **Changes to Submission Requirements:** [No Changes]
3. **Updates to Project Timeline:** [No Changes]
4. **Responses to Questions:**
  1. Can you please confirm whether the RFP requires actual letters written by our public-sector clients, or whether providing reference contact information would be acceptable?
    1. **Answer:** The City requests that Proposers provide contact information for public-sector client references. Formal reference letters from these clients are not required.
  2. Are financial statements from the past three years required?
    1. **Answer:** Financial Statements from the past three years are not required for submission.
  3. Would the City consider a proposal from a firm that would only address the Federal Lobbying Services? In some cases, we have responded to RFP's like this, where the local government ends up hiring two firms: one for state and one for Federal.
    1. **Answer:** Yes. The City would be willing to consider a proposal from a firm that focuses solely on Federal Lobbying Services or State Lobbying Services.
4. **Additional Resources:** [No Changes]

Susan van Hooij  
Signature

The Southern Group  
Name of Business

Exhibit B – Sample Product List

Item Number	Product Name / Description	Unit Price (Vendor Cost)	Suggested Vend Price
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- Please add additional lines as needed.

# *State of Florida*

## *Department of State*

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

The document number of this corporation is P99000055999.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on April 2, 2025, and that its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Fourteenth day of November,  
2025*



A handwritten signature in black ink, appearing to read "E. T. S. J." followed by a horizontal line.

*Secretary of State*

Tracking Number: 8565063989CU

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