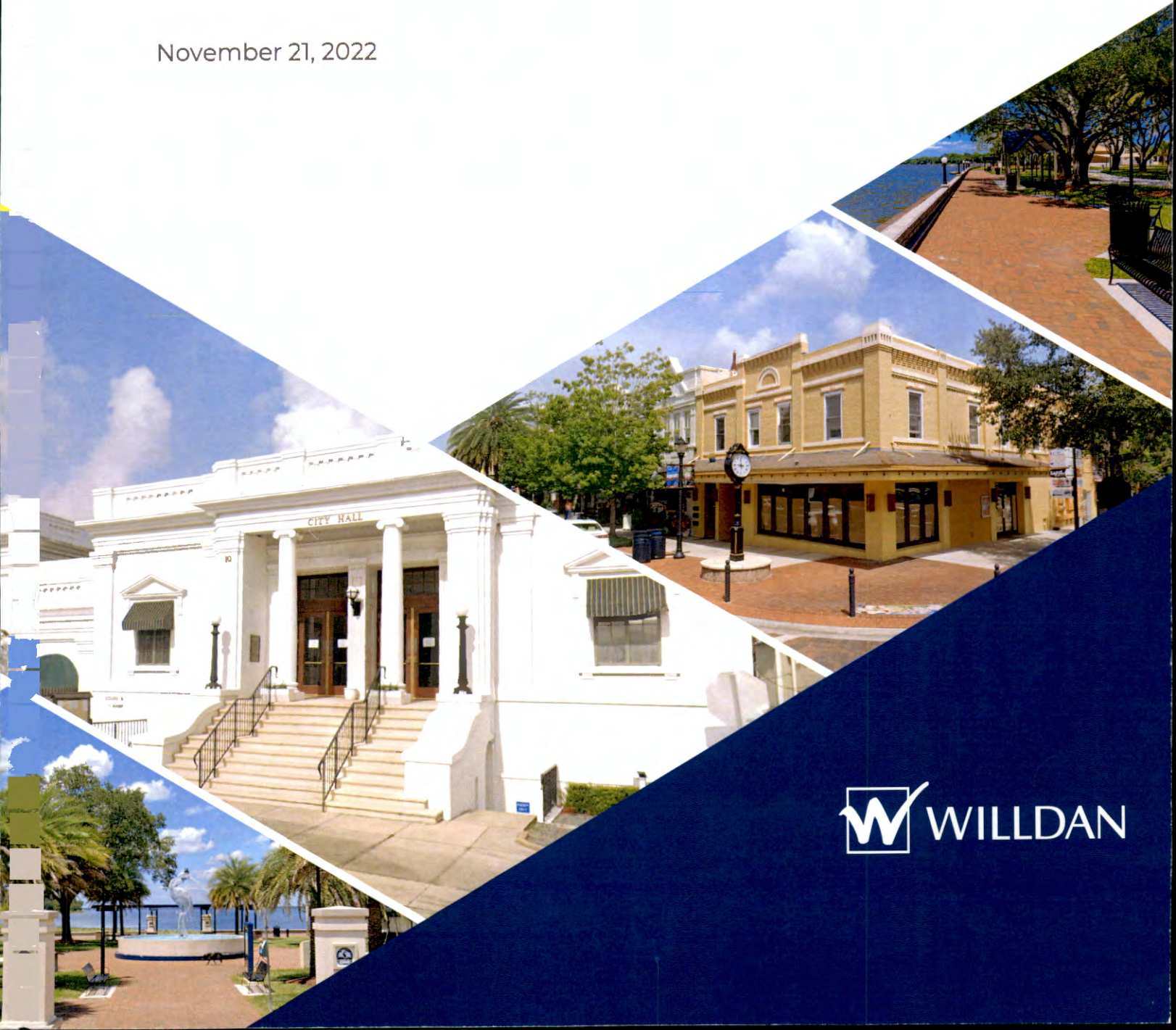


City of Eustis, FL

Municipal Strategic Plan Consultant Proposal #001-23

November 21, 2022



Signature Page

Please return page 7 along with required submittals to:
CITY OF EUSTIS
Purchasing Dept.

City Of Eustis RFQ #001-23
Strategic Plan Consultant
Signature Page

The undersigned acknowledges receipt of:

Written specifications dated: 1. October 31, 2022 AND

Addenda Number 1 , dated 11/9/22
 Number _____, dated _____
 Number _____, dated _____
 Number _____, dated _____

By submitting a response, the undersigned agrees:

- Has examined the site and all Proposal documents and understands that in submitting a response, he/she waives all right to plead any misunderstanding regarding same.
- To hold their response open for acceptance for sixty (60) days after proposal opening.

~~~~~

NAME: Willdan Financial Services

ADDRESS: 200 S. Orange Avenue, Suite 1550, Orlando, FL 32801

AUTHORIZED SIGNATURE: 

SIGNATURE/TITLE (PRINTED): Gladys Medina / Vice President - Group Director

TELEPHONE # 800-755-6864 FAX # 888-326-6864

DATE: 11/14/2022 E-Mail gmedina@willdan.com



November 21, 2022

Ms. Tracy Jeanes  
Director of Purchasing  
City of Eustis  
141 W. Renfro Street  
Burleson, TX 76028

**Re: *Municipal Strategic Plan Consultant for the City of Eustis***

Dear Ms. Jeanes:

Thank you for the opportunity to present our statement of qualifications to assist the City of Eustis (City) with Municipal Strategic Plan Consultant services. Willdan Financial Services (Willdan) understands that the City is seeking consulting services to guide the development of a Strategic Plan (Plan). The resulting Plan will be an integral tool utilized by the City and Staff to ensure decisions and projects properly align with the vision and achieve successful implementation of the Plan.

Willdan is one of the most experienced public sector financial consulting firms in the United States. Our company has helped over 800 public agencies successfully address a broad range of financial and operational challenges, and we are prepared to assist the City by facilitating the strategic planning process, working with your diverse and complex organization, stakeholders, and jurisdiction to deliver a full turnkey strategic plan. Willdan is joined by frequent teaming partner, RMA, a highly experienced economic and real estate (re)development and business attraction/marketing firm successfully serving clients for over 12 years. We have previously collaborated on a broad range of strategic initiatives including an Economic Development Strategic Plan for Pinellas Park, Florida.

While there are certain best practices within strategic planning, we believe that the best solutions are always tailor-made for your organization. No two communities are quite alike, therefore our process and our deliverables will be guided by your particular needs, strengths, and opportunities. Our strategic planning process begins with an in-depth listening and discovery session, where we gain an understanding of the issues your community faces and then pull from our experiences to customize a process that meets your needs. We have designed our processes to create outstanding ideas and support your execution of the plan. In addition to facilitating strategic plans, we can help you create customized reporting that helps your organization stay focused and adjust as necessary.

We believe that thoughtful strategic planning is essential for every community, however, the execution of the plan is what adds lasting value. Because we are local government practitioners at heart, we commit to delivering a project that is concise, actionable, and will help you show accountability for the results, one that provides the City of Eustis with lasting value.

This statement of qualifications is intended to address the specific items in your request; however, I am available for any questions or clarification. Please contact me at your convenience. As an officer of the firm, Mr. Chris Fisher, is authorized to bind the firm.

**Willdan Financial Services**

**Primary Contact**

Mr. Jason Gray, MPSA

Vice President / Managing Principal

Office#: (972) 378-6588, Ext. 302 | Cell#: (469) 396-9640

Email: [JGray@Willdan.com](mailto:JGray@Willdan.com) | [www.Willdan.com](http://www.Willdan.com)

Respectfully,

**WILLDAN FINANCIAL SERVICES**



Jason Gray  
Vice President / Managing Principal



Chris Fisher  
Vice President / Director

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## Section 1: Types of Plans Developed Previously

In this section, we provide background information about our company, our subconsultant/teaming partner, and our combined experience including the types of plans developed previously.

### Firm Profile

Willdan Financial Services (WFS) is an operating division within Willdan Group, Inc. (WGI or Willdan), which was founded in 1964 as an engineering firm working with local governments. Today, WGI is a publicly traded company (NASDAQ: WLDN). WGI, through its subsidiaries, provides professional technical and consulting services that ensure the quality, value and security of our nation's infrastructure, systems, facilities, and environment. The firm has pursued two primary service objectives since its inception—ensuring the success of its clients and enhancing its surrounding communities.

A financially stable company, WGI has over 1,500 employees working in more than a dozen states across the U.S. Our employees include a number of nationally recognized subject matter experts for all areas related to the broadest definition of connected communities. Willdan has solved economic, financial, engineering, and energy challenges for local communities and delivered industry-leading solutions that have transformed government and commerce. Today, we continue leading our clients into a future accelerated by changes in resources, infrastructure, technology, regulations, and industry trends.

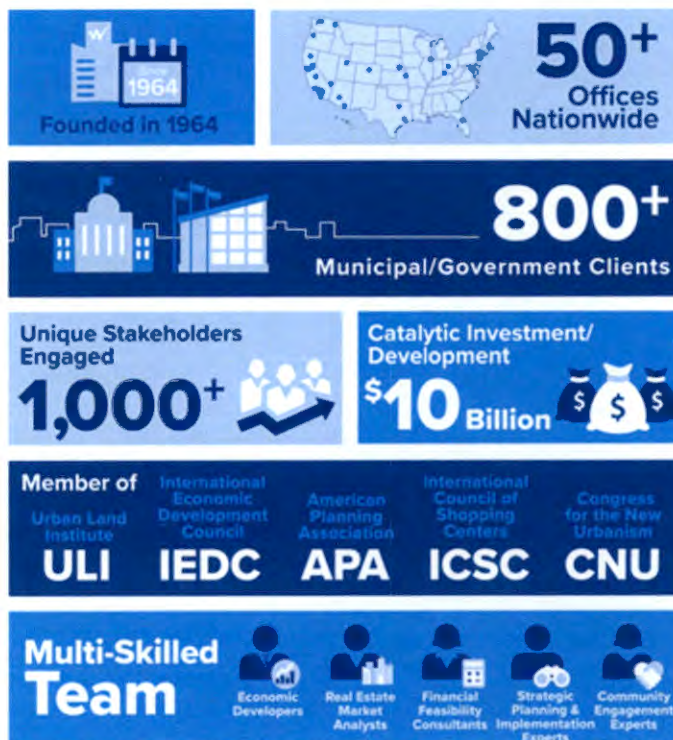
### Willdan Financial Services

Established on June 24, 1988, Willdan Financial Services, is one of the largest public sector economic and financial analysis consulting firms in the United States. We have helped over 800 public agencies successfully address a broad range of infrastructure challenges. Willdan assists local public agencies by providing the services listed below.

#### Willdan Financial Services

##### Areas of Expertise

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>Community-wide strategic plans</li> <li>Economic development strategic plans</li> <li>Financial feasibility studies</li> <li>State/Federal grant writing &amp; program management</li> <li>Fiscal and economic impact analysis</li> <li>Real estate market analysis and advisory services</li> <li>Redevelopment/revitalization implementation</li> <li>Tax increment finance district formation and amendment</li> <li>Municipal advisory services</li> </ul> | <ul style="list-style-type: none"> <li>Infrastructure CIP planning</li> <li>Utility rate and cost of service studies</li> <li>User fee studies and cost allocation plans</li> <li>Special district administration services</li> <li>Development impact fee establishment and analysis</li> <li>Long-term financial plans and cash flow modeling</li> <li>Property tax audits</li> <li>Public-Private Partnerships</li> <li>Business attraction, retention, and expansion</li> </ul> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|





## Municipal Experience

Willdan Financial Services advises governments throughout the United States about strategic planning, market opportunities, project and financial feasibility, real estate economics and development policy, redevelopment, public-private partnerships, economic development, and business attraction/retention/expansion.

Willdan understands municipal operations, the public sector's array of policy objectives, and the political public decision making process.

Willdan understands municipal operations, the public sector's array of policy objectives, and the political public decision making process. We serve all levels of government and collaborate with government staff, constituents, developers, officials, and other professional services firms. We work side-by-side with City staff to extend your operational and strategic capacity and assist you to move initiatives from planning to implementation. Willdan has earned a notable reputation for technical excellence, cost-effectiveness, and client responsiveness in providing superior consulting services for over 58 years.

### Financial and Economic Development Practice



**Economic  
Development  
Strategic Planning  
& Visioning**



**Smart Cities/  
Renewable  
Energy  
Infrastructure  
Financing**



**Fiscal &  
Economic Impact  
Analysis**



**Redevelopment  
Analysis &  
Strategy**



**Real Estate  
Advisory Services  
& Market  
Analysis**



**Public Finance**

## Proven Success

Willdan has a successful record of working primarily with cities, towns, counties, and special districts throughout the United States. We are successful in leading projects that require a high-level of organization and attention to detail, working with numerous entities (staff, community stakeholders, organizations, other consulting firms, etc.) to complete outlined tasks. Our team is skilled in genuine stakeholder engagement with all types of individuals and external agencies to build consensus around priorities and catalytic strategies as a critical component in supporting decision-making and developing a unified plan of action. We utilize exceptional, high-value data, research, analytics, and engagement resources and industry standard subscription-based software applications (Esri Business Analyst, CoStar, Placer.ai, Emsi Labor Analytics, Sli.do) for data collection, analysis, and community engagement. We are dedicated to the communities we serve, and through extensive consensus building, stakeholders and elected officials embrace our proposed strategic plans and programs.

## Team Partnership

Willdan has a long-term teaming partnership with RMA to successfully provide our clients with the most knowledgeable and experienced combination of community-wide strategic planning, economic development, real estate (re)development, CRA, infrastructure CIP financing/planning, and targeted industry business attraction and marketing expertise.

Willdan and RMA offer a tight-knit, cohesive working group.



## Subconsultant/Teaming Partner

### RMA Firm Profile

RMA is a full service economic (re)development firm passionately reinventing cities and target areas to bring hidden assets and unrecognized value to the forefront. We have a proven track record assessing, developing, and implementing plans/programs that are improving communities by utilizing a realistic, comprehensive, and effective approach. The result is *billions* in private sector investment drawn to our client areas.

**We offer comprehensive services in five specialized areas:**

- Economic Development & Redevelopment Strategic Planning
- Business Attraction & Marketing
- Real Estate & Public-Private Partnerships (P3)
- Urban Design & Planning
- Government Management & Administration/Financing

RMA was formed in 2009 by Principal Members, Kim Briesemeister, a Certified Redevelopment Administrator, and Christopher J. Brown, combining their talents and 50+ years of experience providing consulting and management services to governments in the field of urban redevelopment and place making, regionally, nationally, and internationally. RMA headquarters is in Pompano Beach, Florida, with additional Florida office locations in Delray Beach, Jacksonville, and the Central Florida area.

Our expertise includes all aspects of economic development, business attraction and marketing, real estate development and public-private partnerships (P3), urban design and planning, government administration, and community consensus building. RMA's practitioners have led some of the most successful economic development efforts in Florida agencies during the last 30 years, transforming areas throughout Florida into thriving business/entertainment districts, including Delray Beach, Fort Lauderdale, Hollywood, Pompano Beach, and West Palm Beach.

RMA's in-house team is a group of highly experienced professionals, committed to helping our clients in their pursuit of economically diverse and healthy communities. The benefits of working with us include comprehensive access to industry leaders in specialized redevelopment fields under one firm - providing years of knowledge, experience, and proven success as evidenced by the client cities we have helped reinvent. RMA has the experience, in-house expertise, and financial stability to successfully complete and implement projects of all sizes.



#### **REDEVELOPMENT MANAGEMENT ASSOCIATES**

is an independent and majority  
woman-owned Limited Liability

Corporation headquartered in Broward County, licensed to do business by the State of Florida. Principal Members are Kim Briesemeister and Chris Brown.

#### **RMA HQ**

2302 E. Atlantic Blvd., Pompano Beach, FL 33062

P: 954.695.0754 | F: 754.240.7885

[info@rma.us.com](mailto:info@rma.us.com) | [www.rma.us.com](http://www.rma.us.com)



## CRA Experience

RMA's approach to redevelopment is grounded in reality and based on years of experience creating and implementing CRA and strategic plans that lead to successful revitalization. Our team has worked hands-on with city and CRA teams throughout Florida as staff and as consultants, dealing with the myriad regulations, requirements, and issues facing cities and CRA's.

Our approach balances financial and market feasibility with economic vibrancy, regulatory efficiency, and a community's identity and character to identify initiatives and strategies that are realistic and can be successful with the resources that are available to the city/CRA.

RMA's understanding of Florida CRA's and how they operate is unmatched. The firm's principals have previously independently managed four of the largest CRA's in the state of Florida: Delray Beach, Fort Lauderdale, Hollywood, and West Palm Beach. Additionally, RMA as a firm managed four Florida CRA's Pompano Beach, Dania Beach, Margate, and West Palm Beach, and currently provides staff for the West Palm Beach CRA. Also, RMA Principals are both former Florida Redevelopment Association (FRA) Presidents and Key Personnel are current/past board members.

- CRA Services
- CRA Management & Administration
- CRA Redevelopment Plans
- Findings of Necessity
- Public Finance
- Public-Private Partnerships (P3)
- Branding & Marketing
- Incentives
- Real Estate

## Types of Plans Developed Previously

Provided in the table below is an abbreviated list of engagements, similar in nature to that of the City of Eustis project, which have been completed by Willdan and RMA team members in the previous five years. The (\*) denotes recent projects that Willdan and RMA worked on together.

| Project Team 5-Year Experience |                                                                        |
|--------------------------------|------------------------------------------------------------------------|
| Client                         | Project                                                                |
| City of Missouri City, TX      | Strategic Alignment, Strategic Plan Update, and Implementation Guide   |
| City of Hutto, TX              | Strategic Plan and Implementation Guide                                |
| City of Argyle, TX             | Vision and Values Workshops and Stakeholder Engagements                |
| City of Lancaster, TX          | Economic Development Strategic Action Plan                             |
| City of Bismarck, ND           | Community Strategic Plan and Implementation Guide                      |
| City of Pinellas Park, FL*     | Economic Development Strategic Plan                                    |
| City of Jacksonville, FL*      | Downtown Jacksonville Investment Authority Market Feasibility Analysis |
| City of Tamarac, FL*           | Economic Development Strategic Plan & Developer Incentives Program     |
| City of Deltona, FL            | Strategic Economic Development Plan                                    |
| Sumter County, FL              | Economic Development Strategic Plan & Marketing Services               |
| City of Mount Dora, FL         | CRA Plan Update & Extension of Sunset                                  |
| City of West Columbia, SC      | Redevelopment and Revitalization Plan                                  |



## Section 2: Municipal Strategic Planning Experience

Our view of strategic planning is that the real value is not in a final strategic plan document, but rather in a **framework** that we facilitate within your organization and community that leaves all of your stakeholders fully engaged with a mindset and platform to expand upon the vision and strategic focus areas set out. Of course, we have standard processes, methods, and formats that are time tested that we generally employ, however, each engagement and each session is pre-planned and tailored with your team to determine points of emphasis, relative timing, and is designed to proactively address your current issues, status, and goals.

The real value is not in a final strategic plan document, but in a framework for execution.

### Inclusive Community Investment

Inspired, invested strategic partners and stakeholders are the driving force behind communities that set their vision and advance forward to meet the future.

Policies and programs crafted with broad consensus will empower the Eustis community to make intentional transformative impacts.

The Willdan project team brings practical experience to the wide variety of issues and problems facing local governments. We work with communities of all types and sizes across the United States and build a team of recognized subject matter experts to staff your project. We thrive working alongside committed community leaders, helping them think and act strategically and with precision intentionality. We leverage our personal practical experience to align those strategic thoughts into measurable and actionable plans that help move your community forward.

Our project team is led by an individual who spent fifteen years working in City Management with communities facing growth, suburbanization, redevelopment, and the ever-changing dynamics of fast-growth communities and the organizations which serve them. Since leaving City Management, Project Manager, Jason Gray, has spent the past nine years supporting communities through an approach that focuses intently on understanding the needs of our clients and developing strategies, negotiating deals, and providing cutting-edge analysis and reporting that serve those needs.

## Central Florida Experience + Nationwide Expertise

Willdan and RMA's Central Florida long established offices enable our team to quickly initiate the project's immersion process, connecting with your diverse strategic partners and stakeholders to deliver a targeted strategic plan supported by industry best standards for recommended actions, resources, and potential funding sources. We are flexible and nimble in solving analytical problems or other challenges that may arise. Our team has established relationships with a variety of local real estate, planning, urban design, engineering, architecture, brokerage, and developer resources that may be called upon to join focus groups, workshops, or to augment specific analyses if needed.

RMA has worked in Central Florida since 2014, and members of the RMA team have been active in the region for over 20 years. RMA's Central Florida clients include Mount Dora, Deltona, St. Cloud CRA, Haines City CRA, and Sumter County, and the firm has worked on Strategic Finance Action Plans, CRA Plans, Strategic Economic Development Plans, or Strategic Marketing Plans for those clients. RMA has staff located in Central Florida and has observed tremendous growth in the region. RMA staff has a deep knowledge of the Central Florida area and keeps informed about important projects and market conditions of the region.

Our team's local knowledge and success nationwide with similar strategic planning projects will ensure that the services provided are grounded in experience in the competitive context of the Orlando-Kissimmee-Sanford Metropolitan Statistical Area. Additionally, the Willdan team proposed to support the City's strategic planning efforts has collectively worked in 38 states and 40 countries, providing broadly informed perspectives on industry best practices in strategic planning, real estate and economic development, competitive benchmarking assessments, and successful implementation strategies that create and sustain great communities.



# City of Hutto, Texas

## Strategic Plan & Execution Guide



Before engaging Jason Gray, the City of Hutto was operating from three separate documents to guide their strategy. Hutto's City Council and executive staff realized that while a variety of materials talking about strategy existed, there was no overarching strategic framework to guide the decision-making process. Additionally, reporting on initiatives was scattered, inconsistent, and did not focus on specific enough key performance indicators. Through the facilitation of a series of City Council Workshops, one-on-one meetings with their executive staff, and stakeholder meetings we developed a single Strategic Plan & Execution Guide. The Guide aligns, combines, and assigns nearly 200 different goals and objectives.

The process ended up with five distinct Strategic Focus Areas, ten well-defined Strategic Objectives, and 144 measurable goals that continue to move Hutto towards its vision. Since the initial project, we have continued to provide support to Hutto through our comprehensive strategy management system. Our cloud-based strategy execution platform allows for 24/7/365 access to the latest updates and alignment of their work plan and strategic plan. We recently facilitated an annual update to their Strategic Plan & Execution Guide, engaging a new group of elected officials in an in-depth discussion of their use of the Guide and their role in the strategic governance dynamic within the community.

**Project Successes:** We helped Hutto develop its first comprehensive strategic plan and execution guide, including five new Strategic Focus Areas and ten community objectives. Hutto continued to use our Strategy Management System for several years to help them provide the clarity, resources, and follow-up necessary to successfully implement the plan.

### Services

- Stakeholder & Public Engagement
- Market-Driven Commercial Development Targets and Strategies
- Alignment of Governance and Desired Outcomes
- Fiscal/Economic Impact Analysis
- Market Analysis
- Retail Attraction

### Client Contact

Doug Gaul  
Former Mayor

Tel #: (512) 413-4370 | Email:  
[gaulagency@gmail.com](mailto:gaulagency@gmail.com)

### Report Link

<https://willdan.box.com/s/1h0t0kk5g21y4m3blz3qrypelbwhxqek>

### Project Manager

Jason Gray



# City of Missouri City, Texas

## Strategic Alignment & Strategic Plan Update



The City of Missouri City executive staff realized that a political shift was taking place within the community and engaged Jason Gray, to help bring logical structure to the various plans and documents that they had invested in over the past five years. While new elections had emphasized some of the varied views of this diverse community, we recognized a need to facilitate strategy alignment workshops early in the process, which allowed the community to recognize that it had more common ground than disagreements.

Using a combination of SWOT analysis, strategy mapping techniques, preferencing of objectives and open, transparent strategy workshops we assisted Missouri City in not only restructuring their existing plans, but in the development of a wholly new plan in the process. Through the facilitation of a series of City Council Workshops, staff workshops, and one-on-one meetings with department heads, we developed a single Strategic Plan & Implementation Guide that the community uses today to guide their decisions about budgets, initiatives, and departmental work plans.

**Project Successes:** Our work resulted in a complete restatement of the City's strategic initiatives, including five new Strategic Focus Areas, seventeen initiatives, and over 70 new activities, goals, projects, and Key Performance Indicators. The plan was adopted unanimously, and the community is making great progress on implementing its new strategy.

## Services

- Stakeholder & Public Engagement
- Alignment of Governance Style and Desired Outcomes
- Identifying Public-Private Partnership Opportunities
- Market Analysis
- Economic, Workforce & Demographic Analysis

## Client Contact

Robin Elackatt  
Mayor

Tel #: (281) 403-8500 | Email:  
[Robin.Elackatt@missouricitytx.gov](mailto:Robin.Elackatt@missouricitytx.gov)

## Report Link

<https://willdan.box.com/s/gohsw6i6bgvfhgufvw73i572jcgypk8j>

## Project Manager

Jason Gray



# City of Bismarck, North Dakota

## Strategic Plan & Execution Guide



The City of Bismarck, North Dakota engaged Jason Gray to facilitate a major revision to its community-wide strategic plan. Bismarck, the growing capital city of North Dakota had last updated its Strategic Plan in 2012 and saw a need to not only update goals and objectives, but also to implement a much more rigorous strategy and performance management system into their organization.

Working with the community through a series of stakeholder surveys, focus group meetings, public events, a dedicated web portal, key stakeholder interviews, a town hall meeting, and multiple City Commission meetings, we are currently outlining the strategies and are actively working towards delivering a Plan and Execution framework that will take Bismarck's operations well into the next decade. This project includes the development of a full Strategic Plan update and implementation of the Strategy and Performance Management System.

This update to the Strategic Plan for the City of Bismarck is the City's most comprehensive approach ever adopted for planning for its future. The deep community engagement and ongoing execution support is currently shaping many of Bismarck's policy discussions and will serve as a living guide for years to come.

**Project Successes:** Our work completed the revision to the City's strategic plan, including a revised Vision Statement, six new Strategic Focus Areas, and more than 80 specific action steps.

### Services

- Stakeholder & Public Engagement
- Market-Driven Commercial Development Targets and Strategies
- Alignment of Governance and Desired Outcomes
- Fiscal/Economic Impact Analysis
- Market Analysis
- Retail Attraction

### Client Contact

Jason Tomanek  
Assistant City Administrator

Tel #: (701) 355-1300 | Email:  
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### Report Link

<https://willdan.box.com/s/f0z74re3lap8kkh0mjlfl0enicj0p8wm>

### Project Manager

Jason Gray



# City of Pinellas Park, Florida

## Economic Development Market Analysis & Strategies: Implementation Plan



Willdan, along with teaming partner RMA, conducted an economic market analysis to inform a citywide infrastructure funding strategy for prioritizing long-term city investments (2022-2041), while also facilitating implementation of the City Center Master Plan in the short term (2022-2026). Working in collaboration with the concurrent Comprehensive Plan and City Center Master Planning initiatives, our team undertook extensive real estate market research and a business climate survey.

This planning effort included an economic profile report with demographic analysis comparisons; collection and analysis of real estate market data relative to commercial, industrial, residential, and retail land uses; workforce analysis; and an implementation program and “economic dashboard” of benchmarking metrics to measure the success of strategies and initiatives.

The Five-Year Implementation Plan prioritizes funding for the capital, operating, and staffing resources required to successfully achieve the City’s economic development mission and vision.

**Project Successes:** The resulting data and analytics revealed that Pinellas Park has evolved from a bedroom community into a powerful industrial/manufacturing jobs center in the region. The City’s thriving industrial businesses are the foundation of Pinellas Park’s economic base, and these businesses should be further cultivated through a targeted Business Retention & Expansion Program (BREP).

## Services

- Strategic Planning
- Real Estate Assessment
- Economic, Workforce & Demographic Analysis
- Stakeholder Engagement
- Industrial Sector Focus Group/SWOT Workshop
- Business Climate Survey
- Infrastructure Funding Strategy

## Client Contact

Nick A. Colonna, AICP  
Assistant Community  
Development Administrator

Tel #: (727) 369-5631 | Email:  
[ncolonna@pinellas-park.com](mailto:ncolonna@pinellas-park.com)

## Report Link

Not yet published, in final approval process.

## Project Team

Willdan – Prime Consultant  
RMA – Sub Consultant



# City of Tamarac, Florida

## Economic Development Strategic Plan



Willdan prepared the City of Tamarac's Economic Development Strategic Plan (the Economic Development Element of the City's Comprehensive Plan), adopted in May 2018. This planning effort was funded by the Florida Department of Economic Opportunity and included the preparation of a baseline Data & Analysis Report; as well as identification and recommendation of potential citywide economic development incentive programs for business retention and recruitment that are applicable to five retail revitalization "Focus Areas" and citywide; a targeted business incubation strategy, formulation of a land bank policy; establishment of a public realm improvements (Placemaking) fund; and an implementation program and "economic dashboard" of benchmarking metrics to measure the success of strategies and initiatives.

To achieve the City's economic development goals and objectives, Willdan conducted stakeholder interviews and a private bus tour sponsored by ULI - the Urban Land Institute - of Focus Areas with real estate developers, brokers, retail tenants and others to determine the market and regulatory conditions required to attract private redevelopment activity in the City's most disinvested retail plazas.

This innovative public outreach process resulted in the assemblage and disposition of one site now undergoing mixed-use residential/retail redevelopment by Eden Multifamily.

The five-year plan envisions approximately \$5 million of economic development investments supported by multiple sources of funding from the City's General Fund, grants and other alternative funding opportunities allocated to each of the plan's five-year implementation horizon.

**Project Successes:** The Economic Development Element deliverable was named in the top 5 of more than 80 State of Florida Office of Economic Opportunity Grant submissions for the quality and tactical implementation plan. Willdan/RMA were subsequently hired in 2019 to conduct a Developer Incentives Study to establish the City of Tamarac's Developer Incentives Program, including guidelines and application process.

### Services

- Stakeholder Engagement
- Real Estate Analysis & Public-Private Partnership
- Retail & Small Business Development
- Fiscal/Economic Impact Analysis
- Affordable Housing
- Economic, Workforce & Demographic Analysis
- Commercial Area Redevelopment Plans

### Client Contact

Kathleen Gunn  
Assistant City Manager

Tel #: (954) 597-3510 | Email:  
[Kathleen.Gunn@tamarac.org](mailto:Kathleen.Gunn@tamarac.org)

### Report Link

[https://www.dropbox.com/s/fx9bkcdp872ime4/Tamarac%20Final%20EDSP 2018 05 16.pdf?](https://www.dropbox.com/s/fx9bkcdp872ime4/Tamarac%20Final%20EDSP%202018%2005%2016.pdf?)

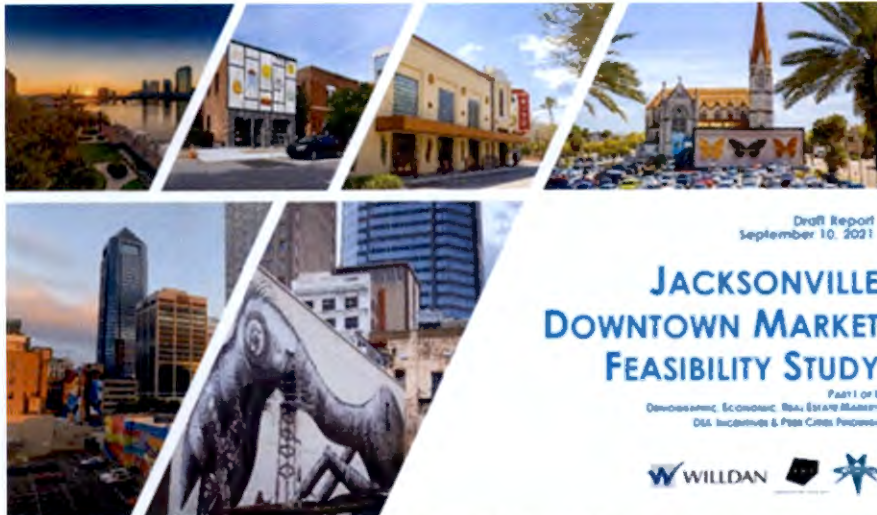
### Project Team

Willdan – Prime Consultant



# DIA/City of Jacksonville, Florida

## Downtown Market Feasibility Study



Willdan's team utilized their knowledge and expertise in real estate market feasibility and development, and real estate market analysis to assess the current, and project the future, feasibility of Downtown Jacksonville's office, commercial/retail, hospitality, and residential development and redevelopment, inclusive of both the Northbank and Southside Community Redevelopment Areas.

The real estate market feasibility analysis utilized exciting new data sources, such as Placer.ai, to evaluate neighborhood/district-level trends to inform:

- Policy recommendations
- Redevelopment strategies
- Allocation of tax revenue and development incentives

This was a complex undertaking involving the compilation, analysis, update, and expansion of baseline demographic data and real estate trends and projections; providing an assessment of development opportunities and constraints, as well as opportunities to catalyze development activity with targeted incentives, in each downtown neighborhood district.

Willdan conducted stakeholder interviews with real estate developers, brokers, retail tenants, and others to determine the market, regulatory conditions, and targeted incentives required to attract private development and redevelopment activity in the City's most disinvested downtown areas.

The key conclusions from the market feasibility study are that Downtown Jacksonville has made significant progress towards the CRA Plan development goals, and that the city should direct development incentives to identified areas of need as certain neighborhoods/districts no longer need incentives.

**Project Successes:** The Downtown Jacksonville Market and Feasibility Study informed Developer Incentives policy recommendations in the CRA Plan Update, further catalyzing more than \$1 billion of redevelopment in disinvested downtown neighborhoods.

## Services

- Stakeholder Engagement
- Real Estate Market Analysis
- Incentives Analysis
- Demographic & Market Analysis at the District Level
- Peer Cities Case Study Research & Benchmarking

## Client Contact

Steven. T. Kelley, DBA  
Director of Downtown Real Estate & Development  
Downtown Investment Authority (DIA)

Tel #: (904) 255-5304 | Email: [SKelley@coj.net](mailto:SKelley@coj.net)

## Report Link

Part I:

[https://willdan.box.com/s/8gjh\\_w6s2ks4y945z085erpjdbtyq33dk](https://willdan.box.com/s/8gjh_w6s2ks4y945z085erpjdbtyq33dk)

Part II:

<https://willdan.box.com/s/c4jri>

## Project Team

Willdan – Prime Consultant  
RMA – Sub Consultant



# City of Deltona, Florida

## Strategic Economic Development Plan



RMA's team of professionals took an economic development approach with a real estate-based foundation to identify areas most suitable for a commerce park, and create a strategic plan designed to enhance the City's assets for business attraction. This holistic approach to develop a strategic action plan for Deltona was critical for success. RMA's tasks included a market analysis, and in-depth research to determine the industries most suitable for the City and this particular area. One notable area, a prime 240+/- acre site, had been held for more than 30 years by a privately-owned investment group out of Australia

and the City had not been successful in getting the property owner to the table to discuss development.

Our research and communications with local, regional, state, national and international stakeholders included outreach that resulted in interest from several property owners to participate with the City in the creation of a logistics center. Our analysis identified the City's current economic conditions and market potential to attract new investment and demonstrated to the real estate market the advantages of doing business in the City of Deltona, and the viability of a logistics center.

Upon the completion of the market analysis, RMA provided a comprehensive report highlighting demographics, psychographics, existing businesses and consumer trends and new business development opportunities, laying the foundation for development of the strategic action plan. In the plan, specific areas for opportunities were identified and conceptual plans created to demonstrate the highest and best use of the properties for development. Public-private partnerships, form-based zoning codes, pedestrian friendly connectivity and multimodal transit, housing, infrastructure, history, culture, and community connections were addressed. To connect initiatives to realistic implementation, various funding sources such as public-private partnerships, grants, and government loans were identified as potential opportunities to assist with economic development.

Site readiness was identified with the assistance of local and regional energy providers, resulting in the education of property owners to the immediate marketability of their properties. Opportunity sites were identified, analyzed and conceptual plans developed to determine the number and sizes of buildings that would be appropriate for the proposed business/commerce park.

**Project Successes:** Deltona's Strategic 5-Year Economic Development Plan resulted in the creation of Portland Industrial Park. **Currently under development is a 1M square foot Amazon distribution center, providing more than 500 permanent jobs with benefits for the City, and a \$100 Million project being added to the tax base.** The Plan has resulted in a clear direction, with strong support from the public and private sector that will ensure the success of Deltona's quest for commercial investment. The second phase of Portland Industrial Park is now underway.



## Services

- Strategic Planning
- Market Analysis
- Real Estate Evaluation
- Targeted Industry Recruitment

## Client Contact

Jerry Mayes  
Economic Development  
Manager  
City of Deltona, FL

Tel #: (386) 878-8619 |

Email:

[jmayes@deltonafl.gov](mailto:jmayes@deltonafl.gov)

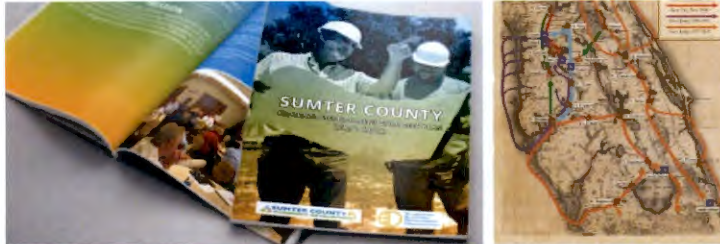
## Project Team

RMA – Prime Consultant



# Sumter County, Florida

## Economic Development Strategic Plan & Marketing Services



As the "Center of Florida Commerce", it is of paramount importance for Sumter County to communicate the County's economic development opportunities throughout the State, Regional, National, and International Markets.

The County retained RMA to provide Economic Development Marketing Services to develop an Economic Development Strategic Plan and a Tourism Strategic Plan with branded, standardized messaging to effectively communicate the County's opportunities.

With land available for commercial development, the right message had to be conveyed, and the targeted companies accessed to make site selectors and business owners aware of the opportunities. RMA's team approach is grounded in our understanding of business and real estate. We understand what business needs to know about an area, and we use our customized approach and successful experience to go beyond the data. Demographics, traffic counts, psychographics, workforce, and higher education are key in the selection process for commercial development.

**Project Successes:** RMA developed and designed the Sumter County Economic Development Strategic Plan (2020-2022) and the Sumter County Tourism Strategic Plan (2020-2022) to provide targeted plans for the County to meet their economic development goals and assist with marketing and promotions. These services include RMA's delivery of materials on time, and below budget.

## Services

- Strategic Planning
- Marketing
- Copy Editing
- Graphic Design

## Client Contact

Bradley Arnold  
County Administrator  
Sumter County, FL

Tel #: (352) 689-4400 |  
Email: [bradley.arnold@sumtercountyfl.gov](mailto:bradley.arnold@sumtercountyfl.gov)

## Project Team

RMA – Prime Consultant



# City of Mount Dora, Florida

## CRA Plan Update & Extension of Sunset



The Mount Dora Community Redevelopment Agency (CRA) had been created by the City in 1987 in response to a group of business owners looking to enhance the downtown. While the CRA had been responsible for a wide range of downtown improvements, the last CRA Plan had been developed just as the world was coming out of the last recession and needed to be updated to reflect the changing real estate and economic conditions. In April 2019, RMA was hired by the Mount Dora CRA to update the CRA Plan to reflect an agency extension of thirty years so the Mount Dora CRA can continue to improve the community and increase the commercial tax base from 2019 to 2049.

The RMA team of professionals completed a market analysis of the CRA to develop recommendations based on the economic development drivers of land, labor, capital, market, and regulation. This analysis, along with community and stakeholder input, identified additional industry clusters and the uniqueness of the district that could be used to attract new investment. In addition to the market analysis and community input, RMA had a vast understanding of Mount Dora due to previous work done with the City, and the RMA team was able to effectively analyze the current market, determine business climate themes, resident needs, and direct staff in the most effective ways to increase redevelopment in the area.

**Project Successes:** In November 2019, the Mount Dora CRA Plan Update and Extension was approved by the City Council with praise from several members regarding the quality of the plan. The redevelopment plan will serve as a road map and provide guidance for implementation of redevelopment strategies in the Mount Dora CRA area. In the plan, priority opportunities were identified based on the need in the community with clear direction and funding prospects identified for implementation. CRA staff can actively address the priority areas of Lake Dora Waterfront, Downtown Parking, Business Retention, Beautification, Public-Private Partnerships, Regional Connectivity, and Tourism to make the Mount Dora CRA even more successful, now and into the future.

## Services

- Strategic Planning
- Market Research & Analysis
- Community Engagement

## Client Contact

Adam Sumner  
CRA Administrator  
Mount Dora Community  
Redevelopment Agency (CRA)  
City of Mount Dora, FL

Tel #: (352) 735-7112 | Email:  
[sumnera@cityofmoundora.com](mailto:sumnera@cityofmoundora.com)

## Project Team

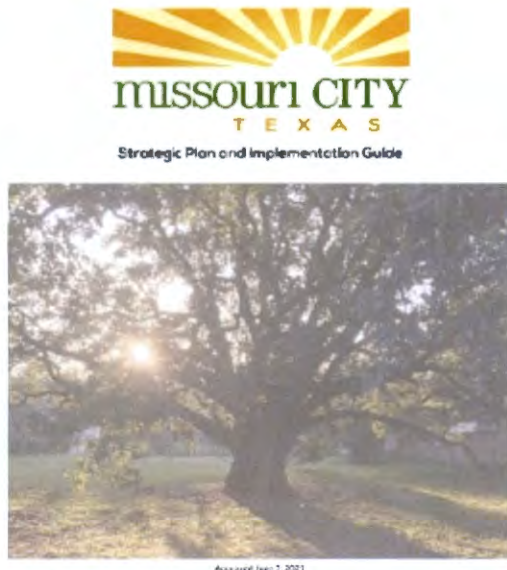
RMA – Prime Consultant



## Section 3: Examples of Previous Strategic Plans Produced

Provided below are links to strategic plans and similar studies completed by the project team.

### City of Missouri City, Texas Strategic Plan



<https://willdan.box.com/s/gohsw6i6bgyhguvfw73i572jcgypok8j>

### City of Hutto, Texas Strategic Plan



<https://willdan.box.com/s/1h0t0kk5g21y4m3blz3qrypelbwhxqek>

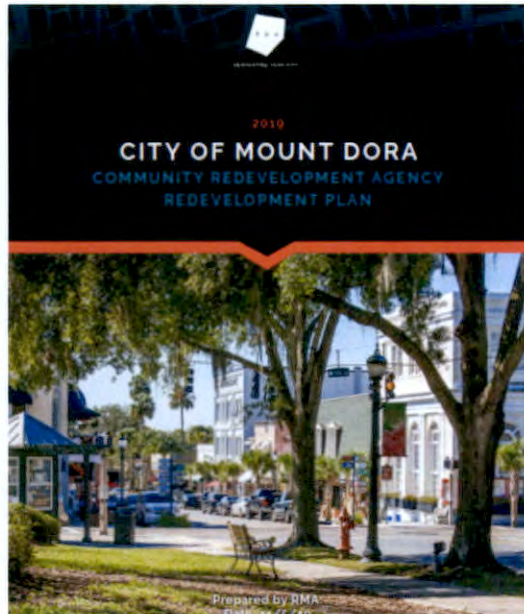
### City of Bismarck, North Dakota Strategic Plan



<https://willdan.box.com/s/f0z74re3lap8kkh0mjlff0enicj0p8wm>

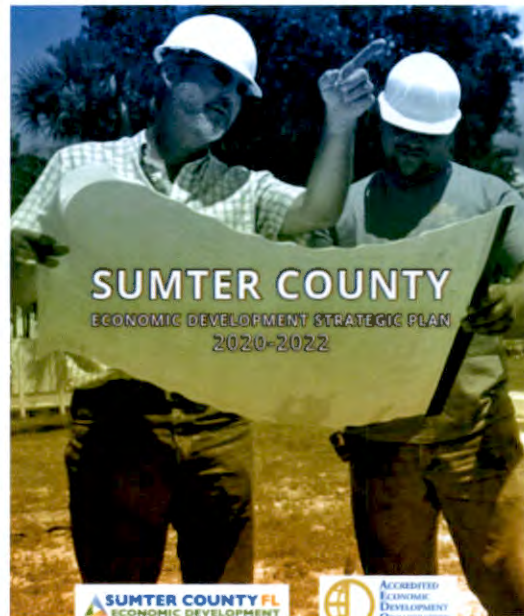


## City of Mount Dora, Florida CRA Plan Update



<https://willdan.box.com/s/jj1rt2buqhrrokk85ovn014hgm8iacns>

## Sumter County, Florida Economic Development Strategic Plan



<https://willdan.box.com/s/m44yvb4sh8s7kox2uknyrm3y14h43tle>








## Section 4: Evidence of Meeting Deadlines and Milestones

### Project Management and Communication

At Willdan, we utilize a Project Management Process/Approach that ensures projects are completed on time, within budget, and most importantly yield results that match our clients' expectations. We will document discussions leading to important policy decisions and/or the choice of critical assumptions used in constructing the analysis and model. Following key stakeholder discussions, we will schedule a call to summarize findings and direction with City staff, to make certain that we are in agreement with stated objectives, and that feedback is incorporated as appropriate.

Through the process of providing regular updates and conducting status conference calls, potential issues will be highlighted, discussed, and resolved. Any deviances from the project timeline will be identified and plans will be developed for course corrections. If necessary, changes in approach or strategy will be discussed with City staff, to meet the needs of the City of Eustis. In doing this, we will ensure the project stays on track and evolves, based upon current thinking and outside dynamics.

| Project Management                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <br>Define the Project                                                                                                                                                                                                                                                                      | <br>Plan the Project                                                                                                                                                                                                                                                                                               | <br>Manage the Project                                                                                                                                                                                                         | <br>Review the Project                                                                                                                                                                           | <br>Communicate the Project                                                                                                                                                                                                     |
| <ul style="list-style-type: none"> <li>Identify the project scope, set objectives, list potential constraints, document assumptions.</li> <li>Define a course of action and develop an effective communication plan.</li> <li>Provide a forum for applying the team's collective expertise to solving difficult analytical issues that arise in complex projects.</li> </ul> | <ul style="list-style-type: none"> <li>Collaborate with the project team and client staff and agree upon timeline to meet the estimated project timeline.</li> <li>Assign workload functions to appropriately qualified staff to ensure milestones are met, on time.</li> <li>Pre-schedule quality control meetings with project team to maintain the progressive motion of the project.</li> </ul> | <ul style="list-style-type: none"> <li>Manage the execution of the project.</li> <li>Direct existing and upcoming project tasks.</li> <li>Control and monitor work in progress.</li> <li>Provide feedback to client and project team.</li> <li>Identify and resolve deviances from project timeline.</li> </ul> | <ul style="list-style-type: none"> <li>Review all work product and deliverables.</li> <li>Utilize structured quality assurance process involving up to three levels of review at the peer level, project manager level.</li> <li>Procure executive officer level review.</li> </ul> | <ul style="list-style-type: none"> <li>Communicate with the client regarding work status and progress.</li> <li>Ensure client is in receipt of regular status updates.</li> <li>Schedule regular conference calls to touch base.</li> <li>Inform client of roadblocks, work outside of projected scope.</li> </ul> |



## Quality Assurance / Quality Control Process

Our quality control program is incorporated as a required element of Willdan's day-to-day activities. There are three levels of reviews incorporated for our deliverables:

- 1) Peer review,
- 2) Project Manager review, and
- 3) Final quality assurance manager review.

Peer reviews involve one analyst reviewing the work of another, while project manager reviews are conducted prior to delivery to the quality assurance manager. The quality assurance manager then performs a final review. This ensures that our final product has been thoroughly evaluated for potential errors; thus, providing quality client deliverables, and high levels of integrity and outcomes. The primary mission of our quality control plan is to provide staff with the technical and managerial expertise to plan, organize, implement, and control the overall quality effort, thereby ensuring the completion of a quality project within the time and budget established.



### Quality Assurance Goals

| Goal                                       | Lead                       | Task                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Quality Assurance / Control Process</b> | Jeff McGarvey              | <ul style="list-style-type: none"> <li>o Establish a set of planned and systematic actions for maintaining a high level of quality in the professional services performed; emphasize quality in every phase of work.</li> <li>o Ensure efficient use of resources.</li> <li>o Establish a consistent and uniform approach to the services performed.</li> <li>o Implement appropriate quality control measures for each work task of the project.</li> </ul> |
| <b>Quality Control Plan</b>                | Jason Gray & Jeff McGarvey | <ul style="list-style-type: none"> <li>o Contract deliverables</li> <li>o Specific quality control procedures</li> <li>o Special quality control emphasis</li> <li>o Budget and manpower requirements</li> <li>o Overall project schedule and budget</li> <li>o Project documentation requirements</li> </ul>                                                                                                                                                |



## Section 5: Project Team Members

Our management and supervision of the project team is very simple: fill every position with experienced, capable personnel in sufficient numbers to deliver a superior product to the City, on time and on budget. With that philosophy in mind, Willdan has assembled a senior level project team to serve the City of Eustis through this engagement. We are confident that our team possesses the depth of experience that will successfully fulfill your desired work performance and meet project goals.

| City of Eustis Project Team                                                       |                                      |                                                                                                                                                                                                                                                                                               |
|-----------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject Matter Experts                                                            | Project Role                         | Responsibility to the Engagement                                                                                                                                                                                                                                                              |
| <b>Jason Gray, MPSA</b><br>Vice President, Willdan                                | Managing Principal & Project Manager | <ul style="list-style-type: none"> <li>Ensure client satisfaction, flow of communication, and oversight of the project</li> <li>Meeting and workshop facilitation</li> <li>Task oversight</li> <li>Responsible for project deliverables</li> <li>Report preparation and evaluation</li> </ul> |
| <b>Tracey Burghy</b><br>Business Development Manager, Willdan                     | Lead Project Analyst                 | <ul style="list-style-type: none"> <li>Collect and analyze key demographic and economic data</li> <li>Collect, interpret, and disseminate key data</li> <li>Report preparation</li> <li>Meeting and presentation support and attendance</li> </ul>                                            |
| <b>Robert McKerracher</b><br>Analyst, Willdan                                     | Project Analyst                      | <ul style="list-style-type: none"> <li>Collect, interpret, and disseminate key data</li> <li>Report preparation</li> <li>Meeting and presentation support</li> </ul>                                                                                                                          |
| <b>Jeffrey McGarvey</b><br>Vice President, Willdan                                | Project Advisor                      | <ul style="list-style-type: none"> <li>Client Liaison</li> <li>Regional expertise</li> <li>Quality Assurance &amp; Control</li> </ul>                                                                                                                                                         |
| <b>Lynn Dehlinger</b><br>Director of Economic Development / Broker Associate, RMA | Project Advisor                      | <ul style="list-style-type: none"> <li>Interpret and disseminate key data</li> <li>Regional expertise – Economic Vitality and Neighborhood Livability</li> <li>Meeting and presentation support and attendance</li> </ul>                                                                     |
| <b>Sharon McCormick</b><br>Business Attraction & Marketing Director, RMA          | Project Advisor                      | <ul style="list-style-type: none"> <li>Interpret and disseminate key data</li> <li>Tourism, Culture, &amp; Entertainment expertise</li> <li>Meeting and presentation support and attendance</li> </ul>                                                                                        |

### Resumes

A resume for each team member is provided on the following pages.





## Jason D. Gray, MPSA

### Managing Principal and Project Manager - Willdan

Mr. Gray has over 23 years of combined city staff and municipal consulting experience. With extensive knowledge developed over his tenure in an array of communities, he is well versed in the issues facing local governments. Upon his departure from public service, Mr. Gray continues to support cities, counties, and agencies as a Managing Principal with Willdan Financial Services and previously as President and CEO of the J<sup>D</sup>Gray Group, which he founded to continue his dedication to seeing local governments thrive.

Mr. Gray has led over 170 municipal projects ranging from governing body workshop facilitations, city-wide strategic planning efforts, financial and economic impact analyses of growth and development, utility rate studies, long-term financial plans, as well as designing and delivering servant-leadership development programs.

#### Education

*Master of Public Service  
Administration, George Bush  
School of Government &  
Public Service at Texas A&M  
University*

*Bachelor of Arts in Political  
Science, Minnesota State  
University at Moorhead*

*Certificate in High  
Performance/High Potential  
Leadership*

*Cox School of Business at  
Southern Methodist University*

*Certification in Mediation &  
Dispute Resolution*

*George Bush School of  
Government & Public Service  
at Texas A&M University*

#### Areas of Expertise

*Executive-level reporting*

*Data storytelling to enhance  
decision support*

*Strategic Planning*

*Financial Forecasting*

*Economic Impact Analysis*

*Economic Development  
Negotiations*

*Financial Impacts of  
Municipal Growth*

*Bond Rating Optimization*

*Expert Witness Testimony*

#### Related Project Experience

- **Missouri City, Texas | Strategic Plan Development** | Aligned focus areas, goals, objectives, and measures from a myriad of separate plans into a comprehensive strategic plan and execution guide
- **Bismarck, North Dakota | Strategic Plan Update** | Included over 7% of the community participating in an enhanced community engagement effort
- **Argyle, Texas | Strategic Plan Development** | Outer-ring suburban/rural community intending to manage growth within its vision
- **Pilot Point, Texas | Visioning Session Facilitator** | Rural community seeking to clarify its vision and establish its culture
- **Hutto, Texas | Strategic Plan Development** | Community visioning, goal alignment, and execution processes and procedures for this fast growth, central Texas community
- **Hutto, Texas | Governance Workshop Facilitator** | Following on strategic planning work, conducted multiple workshops with City Council and appointed boards and commissions to align vision and clearly establish roles
- **Lakeland, Florida | Servant Leadership Development Program Design and Facilitation** | Developed and presented multi-day workshops for senior leaders focused on the principles and practices of servant leadership
- **North Texas Municipal Water District Member Cities | Solution Architect** | Led the analysis and executive facilitation for the restructuring of a multi-billion-gallon wholesale water rate, assisting thirteen member cities to compromise on a generational rate structure settlement
- **Multiple Locations | Utility Rate Studies and Long-term Financial Plans** | Project Manager & Analyst developing cost of service studies and long-term financial plans for utilities
- **Celina, Texas | Expert Witness** | Complex utility rate-case litigation and settlement negotiations
- **Marana, Arizona | Expert Witness** | Supporting the City of Marana's right to establish and collect development impact fees
- **Ft. Bend County Coalition | Expert Witness** | Supporting a coalition of cities and taxing entities regarding the long-term tax revenue impact of large-scale property devaluation due to natural disasters
- **Frisco, Texas | Lead Negotiator and Project Manager** | A multi-decade 2,100-acre mixed-use development projected to deliver over \$3 billion in direct value growth



**J. Gray***Resume Continued***Affiliations***Member, International  
City/County Management  
Association**Member, Texas City  
Management Association**Member, American Public  
Works Association*

- **Brazoria, Texas | Solution Architect and Negotiator** | Developed a comprehensive financial and risk analysis and economic development strategy for proposed public participation in a private waterpark
- Developer of the Current State Assessment, a multi-indicator comparative assessment tool for communities nationwide
- Founded the Center for Public Servant Leadership, an organization that provides tools and training to public-sector entities to develop a culture of servant leadership

**Municipal Projects and Relevant Experience****23 Years' Experience**

- Increased General Fund reserve by 28% in three years with no tax increases and limited assessed value increases
- Elevated S&P Credit Rating to the industry best AAA
- Cultivated a culture of transparency which led to one of just four perfectly rated Texas Comptroller's Office Gold Leadership Circle awards (2012) and a Platinum Leadership Circle award (2014)
- Developed multi-year financial plan to execute reasonable and regular property tax rate reductions
- Developed and implemented a strategic "Program/Service Level" methodology of budget decision making utilizing quantitative and qualitative analyses of a wide variety of programs and service levels to intentionally align planned expenditures with the goals of the City Council
- Improved ISO rating from ISO3 to ISO1, significantly decreasing commercial property and liability insurance costs
- Lead negotiator in various corporate relocations and expansions securing over 8,000 professional jobs
- Named Money Magazine's Best Place to Live in America in 2014
- Increased Moody's and S&P Bond Ratings three steps from junk bond status to investment grade
- Created and administered multiple Tax Increment Reinvestment Zones
- Renegotiated the City's largest single development agreement in order to provide for city public safety services to a residential community outside of the city limits
- Led effort to plan, propose, and approve three successful bond elections in two different communities
- Transitioned fire protection and emergency medical services from an all-volunteer department to a hybrid volunteer/professional department, cutting response times in half
- Dramatically increased General Fund reserve from 3 days of operating reserve to over 80 days of reserve in three years
- Project manager for selection of and transition to a new Enterprise Resource Planning (ERP) system
- Led implementation of Policy Governance® model of board governance
- Heavily involved in the implementation of a Balanced Scorecard® management framework through the entire organization





## Tracey Burghy

### Business Development Manager - Willdan

Ms. Burghy brings small business and community engagement expertise with the development of outreach plans for connecting and communicating with stakeholders and interested parties; as well as providing research analysis, redevelopment strategies, project management, and logistics support.

Prior to Willdan, Tracey was the Business Development Manager for a Florida-based real estate economic development firm, where she was part of the executive team. She was instrumental in developing and executing the firm's strategic business and marketing plans, including current business objectives and long-term goals.

In addition, Tracey also served as Project Manager for a variety of economic development, real estate, and redevelopment initiatives including economic development strategic plans, marketing and CRA plan research, development, and implementation; real estate development and public-private partnerships; budgeting and finance; marketing/branding, special events, tourism, incentives, community engagement, and business attraction/retention.

#### Education

*Bachelor of Science,  
Business/Marketing | Florida  
Atlantic University (in-  
progress)*

*A.A. | Palm Beach State  
College, Boca Raton, FL*

#### Certifications

*Hospitality & Tourism  
Management Certificate |  
FAU Executive Education*

#### Areas of Expertise

*Business Development &  
Client Relations*

*Project Management*

*Community Outreach &  
Engagement*

*Business Attraction &  
Retention*

*Marketing, Advertising and  
Digital/Social Media/Public  
Relations*

*Event Planning,  
Coordination, Execution*

#### Professional Affiliations

*Florida Redevelopment  
Association*

*Travel and Tourism  
Research Association*

*Life-long volunteer with  
various Veterans  
Organizations, including  
Blinded Veterans  
Association Auxiliary*

**20 Years' Experience**

### Professional & Select Project Experience

#### Business Development, Redevelopment and Marketing/Branding

- Project Management – Business Relations, Incentive Applications, Property Management, Contract Management, Tourism Product Development and Special Events
- Coordination of Economic Development Initiatives with City Departments & Other Governmental Entities
- Community Engagement, Public Relations, and Communications
- Preparation of Various Quotes, Bids, Request for Proposals and Contracts
- Marketing, Creative Design, Collateral Materials – Brochures, Sales/Marketing Package, Newsletters, Flyers, Digital and Social Media, Advertising, Conferences

#### Projects

- **City of Pinellas Park, FL** - Economic Development Strategic Plan
- **City of Jacksonville, FL** – DIA - Downtown Market Feasibility Analysis
- **City of Tamarac, FL** - Developer Incentives Study
- **St. Lucie County, FL** - Treasure Coast Int'l Airport - Freight Logistics Zone Study and Real Estate Conceptual Development Plans
- **City of Miramar, FL** - Historic Miramar Neighborhood Revitalization Strategic Plan
- **City of Miramar, FL** - Real Estate Conceptual Development Plans
- **City of Miramar and City of Lauderhill, FL** - Real Estate Advisory Services
- **RMA Real Estate Development** - Site Redevelopment proposal for the former H.D. King Plant - Fort Pierce, FL (Private Developer Partnership)
- **City of Oakland Park, FL** - Culinary Arts District Marketing, Implementation, Incentive Programs
- **City of Oakland Park, FL** - Prospect Plaza Façade Incentive Program
- **City of Oakland Park and City of West Palm Beach, FL** - Wayfinding Signage Program
- **City of Pompano Beach, City of West Palm Beach, City of Dania Beach and City of Oakland Park, FL** - Marketing/Branding Initiatives





## Robert McKerracher

### Project Analyst - Willdan

Mr. McKerracher is an analyst in the Financial Consulting Services group. He assists in the research, analysis and implementation required for utility rate studies and strategic plans, including budget preparation, document data entry and updates, database management, and report preparation. Mr. McKerracher provides valuable analytical support under the guidance of Vice President Jason Gray.

He has particular expertise in performing financial investigative analysis and evaluation and collaborating with senior project team members. He is critical in assisting the project team in identifying relevant insights, which inspires the compilation and optimization of analytical reports. Mr. McKerracher has two years of previous experience within the banking industry, as an analyst.

#### Education

*Bachelor of Science,  
Business Administration  
in Finance,  
McMurray University,  
Abilene, TX  
Summa Cum Laude*

#### Areas of Expertise

*Rate Studies  
  
Data Analytics  
  
Alternatives Analysis  
  
Advanced Excel*

#### Clubs and Organizations

*GFOAT, Government  
Finance Officers  
Association of Texas*

#### Honors and Awards

*Distinguished member of  
Alpha Chi National  
Honors Society  
Presenter at 2021 Annual  
Finance Conference at  
McMurry University*

#### 1 Year Experience

### Professional & Select Project Experience

**City of Plano, TX – Water and Wastewater Rate Study:** Mr. McKerracher served as the financial analyst, assisting senior project team members, for the City's water and wastewater rate analysis and report for the City of Plano. The project included a 10-year financial plan for the water and wastewater utilities. Several alternative rate structures were developed and an impact analysis of these alternatives on customers and the City was provided. Finally, the impact of recommended rate increases on customers was prepared.

**City of McKinney, TX – Water and Wastewater Rate Study:** Mr. McKerracher served as the financial analyst, assisting senior project team members on the water and wastewater rate analysis and report preparation for the City of McKinney. Since the City is growing rapidly, the report included recommended rates for the next 3 years with the recommendation of an annual review to confirm growth estimates continue as planned. The report also included a 10-year financial plan for the water and wastewater utilities. Several alternative rate structures were developed and an impact analysis of these alternatives on customers and the City was provided. Finally, the impact of recommended rate increases on customers was prepared.

**City of Duncanville, TX – Water and Wastewater Rate Study:** Mr. McKerracher served as the financial analyst, assisting senior project team members, for the City's water and wastewater rate analysis and report for the City of Duncanville. The project included a 10-year financial plan for the water and wastewater utilities. Several alternative rate structures were developed and an impact analysis of these alternatives on customers and the City was provided. Since the City has a large number of Capital Improvement Projects planned, the final recommended plan included an adapted debt schedule. Finally, the impact of recommended rate increases on customers was prepared.

**City of DeSoto, TX – Water and Wastewater Rate Study, Sanitation Rate Study:** Mr. McKerracher served as the financial analyst, assisting senior project team members on the water and wastewater rate analysis and report preparation for the City of DeSoto. The report also included a 10-year financial plan for the water and wastewater utilities. In addition, the City requested a Sanitation rate study to be done as well. Mr. McKerracher assisted with both the water/wastewater rate study as well as the sanitation rate study. Several alternative rate structures were developed and an impact analysis of these alternatives on customers and the City was provided. Finally, the impact of recommended rate increases on customers was prepared.

**City of Beeville, TX – Water and Wastewater Rate Study:** Mr. McKerracher served as the financial analyst, assisting senior project team members, for the City's water and wastewater rate analysis and report for the city of Beeville. The project included a 10-year financial plan for the water and wastewater utilities. Several alternative rate structures were developed and an impact analysis of these alternatives on customers and the City was provided. Finally, the impact of recommended rate increases on customers was prepared.





## Jeffrey McGarvey

### Project Advisor - Willdan

Mr. Jeffrey McGarvey is a Managing Principal in Willdan's Financial Consulting Services group and, for more than 25 years, has provided professional consulting services to municipal water, wastewater, solid waste, electric, and natural gas utilities throughout the country. His experience includes extensive work throughout Florida and the Southeast United States. He possesses a broad range of municipal utility systems experience, including special expertise in complex alternatives analyses; utility rate analyses; utility valuations and acquisitions; regionalization and consolidation studies; debt issuance support, such as the preparation of financial feasibility analyses associated with revenue bond issuance; capital financing analyses; strategic planning; rate and regulatory assistance; and instituting financial mechanisms to provide for the sufficient recovery of operating and capital costs.

#### Education

Bachelor of Science,  
Finance, University of  
Central Florida

#### Areas of Expertise

Alternatives Analysis

Strategic Planning

Rate Studies

Cost of Service Studies

Revenue Bonds

Feasibility Analyses

Capital Funding

Acquisitions

Valuation Analyses

#### Affiliations

American Water  
Works Association

The Water  
Environment  
Federation

The Utility  
Management  
Conference

The WaterReuse  
Foundation

25 Years' Experience

### Experience

**Business and Strategic Planning** – Mr. McGarvey has experience developing complex financial and economic evaluation models for water, wastewater, solid waste, and electric utility systems located throughout the country. Such experience generally relates to the development of business and strategic plans as well as performing structured alternatives analyses and sensitivity analyses related to the evaluation and implementation of system modifications such as service and operational changes as well as planning for customer growth and capital expenditures.

**Revenue Bonds, Feasibility Analyses and Capital Funding** – Mr. McGarvey has been involved in the preparation of capital financing plans and financial feasibility studies associated with the *issuance of over \$1 billion in municipal revenue bonds*. The funding proceeds have been utilized for such purposes as utility acquisitions, expansion of facilities, and various other capital improvement needs.

In addition, he has developed capital funding strategies utilizing various combinations of bonds, bank loans, government assistance loans (i.e., State Revolving Funds) and grants. He has also made numerous presentations on behalf of clients to various bond insurers and rating agencies (Moody's, Standard & Poor's, and Fitch).

**Rate & Cost-of-Service Studies** – Mr. McGarvey has extensive experience in utility rates and cost-of-service studies, having *prosecuted more than 150 throughout the country*. Such experience generally relates to performing budget analyses, customer and usage analyses, development of revenue requirements, cost-of-service allocations and sensitivity analyses related to the implementation of rate structures designed to promote desired usage characteristics. It should also be noted that Mr. McGarvey has *prosecuted over 40 system development fee studies* throughout the course of his career.

**Presentations** – Mr. McGarvey's recent presentations include "Wall Street's Perception of North Carolina Water and Sewer Utilities: Positioning for Success," Presented at the North Carolina AWWA-WEA Annual Conference; and "Renewal and Replacement Costs: How Much is Enough?," Presented at the AWWA/WEF Utility Management Conference.





## Lynn D. Dehlinger

### Director of Economic Development, Broker Associate - RMA

Ms. Lynn Dehlinger's accomplishments include commercial development projects throughout Florida and Georgia, including award winning redevelopment projects. She has been a featured panelist and speaker for the International Council of Shopping Centers, Florida League of Cities, Florida Planning and Zoning Association, Florida Redevelopment Association, Commercial and Industrial Real Estate Brokers, and Central Florida Commercial Board of Realtors. Lynn was recently named one of the region's Most Influential Women in Business.

#### Education

*Attended University of Georgia and Purdue*

#### Certifications

*Licensed Real Estate Broker, State of Florida*

#### Areas of Expertise

*Economic Development*

*Real Estate Development & Brokerage*

*Retail & Mixed-Use Planning & Implementation*

*Public-Private Partnerships (P3)*

*Community Engagement/Meeting Facilitator*

#### Professional Affiliations

*Florida Redevelopment Association Board*

*ICSC Alliance National Committee*

*ICSC Alliance Past Public Sector Chair, State of Florida*

*International Council of Shopping Centers (ICSC)*

*Licensed Real Estate Broker, State of Florida*

*Former Director, Commercial Industrial Real Estate Brokers Association*

*Board of Directors, Helpful Hands Seminole*

*City of Winter Springs Parks and Recreation Advisory Board*

#### 25 Years' Experience

Lynn has negotiated major land development projects with municipalities, including developments of regional impact, public-private partnerships, and local development agreements. She has been involved in development projects for major retailers in the Southeast including Publix, The Home Depot, Epic Theaters, and Walmart. She has authored market analyses for business development and worked with national and international companies to expand their operations and employment base. Lynn currently serves on the board of the Florida Redevelopment Association and ICSC's P3 National Alliance committee. Her experience in negotiating multifaceted agreements and in all aspects of business development including planning, branding and recruitment, position her well for effective leadership and management in today's complex business environment.

### Economic Development and Research

- Analyzed merchandise mix and available property in target areas
- Developed incentive programs to attract new businesses to target areas and to improve and retain target businesses
- Developed and implemented business communication strategies to educate business owners and enhance or improve their individual marketing strategies
- Created tailored marketing and communications strategies to promote opportunities to specific target audiences

### Business Attraction and Retention

Analyzed available properties for development and created retail attraction plans in Florida and Georgia including Atlanta, Orlando, Ft. Lauderdale, Miami, and St. Petersburg

### Visioning and Placemaking

Acted as director of development for several mixed-use and retail projects throughout Georgia and Florida, including Atlanta, Ft. Lauderdale, St. Augustine, Tampa, and Orlando. Activities included initial project vision and development.

### Real Estate Development

Directed development efforts for mixed-use projects including acquisition of property, regulatory enhancements, identification of uses and tenants and marketing of projects.

### Finance

Conducted research and analysis of project development scenarios including projections, fiscal impacts and proforma analysis.





## Sharon McCormick

### Business Attraction and Marketing Director - RMA

Ms. McCormick is a creative thinker with the ability to develop unique and strategic solutions while adhering to government regulations, statutory requirements and community/client values and character. She is a highly skilled leader with extensive award-winning experience in place branding and marketing that has led to millions of dollars of capital investment and increased revenues in RMA's client cities. She has been a featured speaker at both local and national conferences and seminars including the International Downtown Association (IDA) regional and national conferences, Florida Redevelopment Association (FRA), CHAT South Florida's Synergy Summit for Cultural & Heritage Tourism, and Florida League of Cities Economic Development Summit.

#### Education

B.S. | Appalachian State University

ICSC Marketing I & II –  
John T. Riordan School of  
Professional Development

#### Areas of Expertise

Economic Development

Business Attraction &  
Retention

Research & Analysis/  
Marketing Plans &  
Implementation

Brand Identification &  
Development/ Strategy &  
Campaigns

Cultural Arts and  
Special Events

Community  
Engagement/Meeting  
Facilitator

#### Professional Affiliations

Florida Redevelopment  
Association

International Council of  
Shopping Centers (ICSC)

(2007 ICSC Maxi Award;  
Marketing Excellence:  
Public Relations; Branding  
and Marketing, West Palm  
Beach, FL)

#### 30 Years' Experience

### Business Attraction and Retention

- Analyzed merchandise mix and available property in target areas
- Developed incentive programs to attract new businesses to target areas and to improve and retain target businesses
- Developed and implemented business communication strategies to educate business owners and enhance or improve their individual marketing strategies
- Created tailored marketing and communications strategies to promote opportunities to specific target audiences

### Visioning and Placemaking/Marketing and Branding

- Developed numerous place brands, development strategies and marketing campaigns for several RMA client cities
- Created advertising and cross promotional business marketing campaigns through owned, shared, earned, and paid media
- Project managed creative development of wayfinding systems and light pole banner campaigns
- Designed and executed award winning consumer and business attraction and retention campaigns and event programs targeting primary, secondary and tertiary markets, while developing the area's unique brand
- Managed numerous groundbreaking and grand opening events drawing from 50 to 10,000 attendees
- Developed collaborative community engagement programs involving local and county arts organizations, individual artists, and residents
- Created the award-winning Neighborhood Ambassador volunteer participation program

### Economic Development, Research & Implementation

- Authored Strategic Marketing Plans and Managed Implementation
- Conducted and analyzed market survey data, retail gap analysis, tourism research data and consumer behavior research data
- Manage development of digital marketing strategies including websites, social media strategies, content development and e-communications
- Develop and direct storyboards for economic development video production

### Select Awards

2020 FRA, Roy F. Kenzie Award: Presidents Award - Rhythm of Redevelopment Series, West Palm Beach, FL

2018 FRA, Roy F. Kenzie Award: Promotion - Downtown Innovation District | Pompano Beach, FL

2017 FRA, Roy F. Kenzie Award: Planning Studies - Downtown Strategic Marketing Plan | North Miami, FL

2017 FRA, Roy F. Kenzie Award: Promotion - Margate Under the Moon | Margate, FL CRA

2012 FRA, Roy F. Kenzie Award: Cultural Enhancement | Dania Beach, FL

2011 FRA, Roy F. Kenzie Award: Marketing | Dania Beach, FL

2009 FRA, Roy F. Kenzie Award: Cultural Enhancement | West Palm Beach, FL CRA

2009 FRA, Roy F. Kenzie Award: Creative Organizational Development and Funding | West Palm Beach, FL



## Project Dedication

Included on the proposed Willdan Team are 4 Willdan and 2 RMA key personnel, dedicated to providing the requested professional consulting services to the City of Eustis. In addition, Willdan and RMA also have the following team members available to support the project as needed:

- James Edison, JD, MPP, Public Finance Manager & Budget Principal, Willdan
- Carlos Villarreal, Senior GIS & Demographic Analyst Project Manager, Willdan
- Molly McKay, CECD, Economic Development Strategist, Principal Consultant, Willdan
- Kim Briesemeister, Principal Member, RMA
- Chris Brown, Principal Member & Broker, RMA
- Adriane Esteban, LEED® AP, Sr. Project Manager & Budget/Data Analyst, RMA
- William P. Dehlinger, CCIM, Broker Associate, RMA
- Lorena Ledesma, Real Estate Sales Associate & Project Manager, RMA

Willdan is composed of approximately 1,500 employees, including a cadre of local government experts. Willdan's Financial Consulting Services group is composed of a team of over 20 senior-level professional consultants with additional associates in other business lines and a broad support team. The team has the resources to recruit additional, qualified individuals from our employee roster to assist with the completion of this engagement to deliver the final materials on time and within budget. We do not anticipate staffing changes during the course of the project, however, should the situation arise, any change in team members will be discussed with and approved by the City prior to the change being made.



## Section 6: References

Project team client references are provided as requested.

### Willdan/Jason Gray

#### City of Hutto, TX – Strategic Plan and Execution Guide

**Client Contact:** Doug Gaul  
Former Mayor  
Tel #: (512) 413-4370 | Email: [gaulagency@gmail.com](mailto:gaulagency@gmail.com)

#### City of Missouri City, TX – Strategic Alignment & Strategic Plan Update

**Client Contact:** Robin Elackatt  
Mayor  
Tel #: (281) 403-8500 | Email: [Robin.Elackatt@missouricitytx.gov](mailto:Robin.Elackatt@missouricitytx.gov)

#### Bismarck, ND – Strategic Plan & Execution Guide

**Client Contact:** Jason Tomanek  
Assistant City Administrator  
Tel #: (701) 355-1300 | Email: [jtomanek@bismarcknd.gov](mailto:jtomanek@bismarcknd.gov)

### RMA

#### City of Deltona, FL – Strategic Economic Development Plan

**Client Contact:** Jerry Mayes  
Economic Development Manager  
Tel #: (386) 878-8619 | Email: [jmayes@deltonafl.gov](mailto:jmayes@deltonafl.gov)

#### Sumter County, FL – Economic Development Strategic Plan & Marketing Services

**Client Contact:** Bradley Arnold  
County Administrator  
Tel #: (352) 689-4400 | Email: [bradley.arnold@sumtercountyfl.gov](mailto:bradley.arnold@sumtercountyfl.gov)

#### City of Mount Dora, FL – CRA Plan Update & Extension of Sunset

**Client Contact:** Adam Sumner  
CRA Administrator  
Tel #: (352) 735-7112 | Email: [sumnera@cityofmounddora.com](mailto:sumnera@cityofmounddora.com)



## Letters of Recommendation

Provided below are letters of recommendation for Jason D. Gray, Managing Principal.



December 28, 2021

**RE: Letter of Reference | Jason D. Gray**

To Whom it May Concern:

Please accept this letter of reference for Jason D. Gray, a professional consultant who masterfully guided the City of Bismarck, North Dakota through a strategic planning project in 2019 – "Imagine Bismarck". It is with great confidence that I support the work of Mr. Gray, and from firsthand experience, I am pleased to encourage any community exploring a strategic plan to confidently engage in the project with Jason Gray knowing that a solid outcome and focused vision will result.

Jason Gray proficiently facilitated a year-long project that successfully engaged thousands of community residents, stakeholders, leaders and employees of the City of Bismarck to help craft a strategic plan that is a true reflection of who we are as a community, and as an organization. The Imagine Bismarck Strategic Plan has become our organization's action-oriented road map to guide thoughtful and deliberate decisions that intentionally align the resources of the organization toward our goals and vision for our community's future.

As the City's project manager for the Imagine Bismarck Strategic Plan, I had the opportunity to work closely with Mr. Gray throughout the project. From the first interview to recent emails and conversations with Jason about our continued implementation of the Imagine Bismarck Strategic Plan, I have found Mr. Gray to be professional, courteous, timely, and supportive. I would proudly recommend the professional consulting services of Jason D. Gray to other municipal organizations with a desire to define a realistic vision and develop an effective plan to achieve the community's goals.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jason Tomanek", is written over a light blue circular background.

Jason Tomanek  
Assistant City Administrator  
City of Bismarck

Phone: 701-355-1300 • Fax: 701-221-6470 • 221 North 5th Street • P.O. Box 5503 • Bismarck, ND 58501  
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January 5, 2022

To Whom It May Concern:

With great pleasure, I write to recommend Jason Gray and his services as a professional and thought-provoking consultant for strategic planning services. I had the pleasure of working with Mr. Gray in the Town of Argyle as we made an effort to collaborate with our Council, Planning and Zoning Commission, Economic Development Board, and citizens on a strategic plan that met our vision for our unique town.

Mr. Gray coordinated meetings with all boards to discuss ideas and consensus of town vision and goals as seen by all boards. Argyle is a very unique community with a plethora of rural properties and a vision to maintain such for years to come. Mr. Gray's ability to lead dialogue and maintain focus on areas of importance was instrumental in the success of our strategic plan.

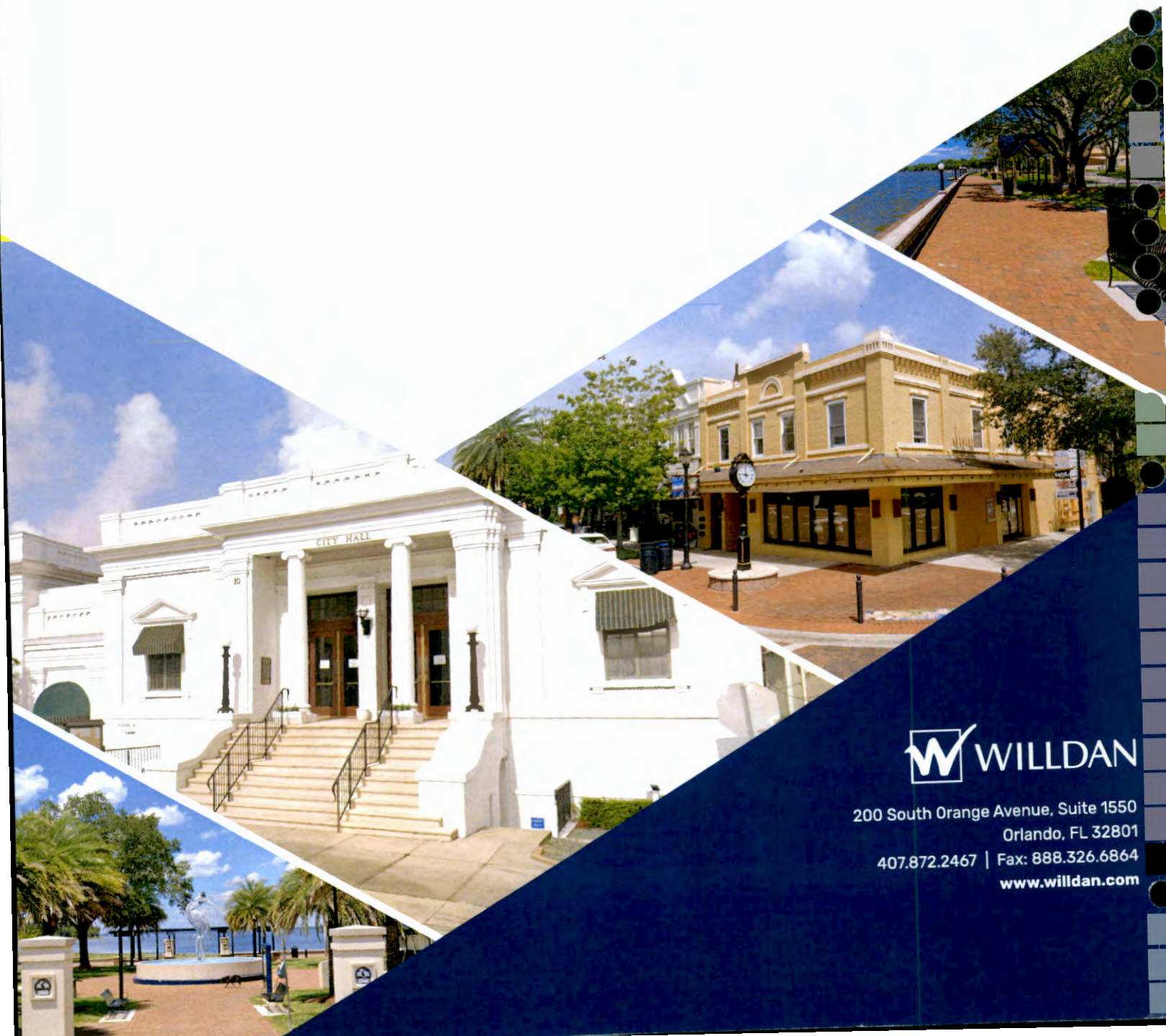
The town developed a strategic planning committee who through the guidance of Mr. Gray, was able to develop guiding principles and focus areas that staff and the community will be able to follow and set goals with over the next five years. Mr. Gray allowed a platform to extract insights from all to put forth a living document that allows for priorities of our boards and citizens to be a guiding light to organizational goals and staff accountability.

The town was extremely happy and satisfied with the plan developed, and I believe this was due in large part to the talent, skills, and professionalism of Mr. Gray. You will not find a more attentive, helpful, and pleasant group to work with. If you have any questions or want more information about our experience with Mr. Gray, please feel free to contact me at [emccomis@breckenridgetx.gov](mailto:emccomis@breckenridgetx.gov).

Sincerely,

Erika McComis  
City Manager of Breckenridge, TX  
Formerly Assistant Town Administrator at Argyle, TX





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