# Request for Proposals 2018-022a
# Comprehensive Plan Amendment Consulting Services

**PREPARED AUGUST 6, 2018 FOR:**

The City of Margate

5790 Margate Boulevard

Margate, FL 33063

- Comprehensive Planning
- Development Review
- Urban Design Review
- Public Engagement
- Municipal Services
- Planning & Zoning Analysis
- Plan & Permit Review
- Zoning Inspections
- Redevelopment Planning
- Neighborhood Studies
- Corridor Studies
- Economic Impact Analysis
- Expert Witness Services

**The Mellgren Planning Group**

3350 NW 53rd Street, Ste. 101

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**Comprehensive Plan Amendment Consulting Services**

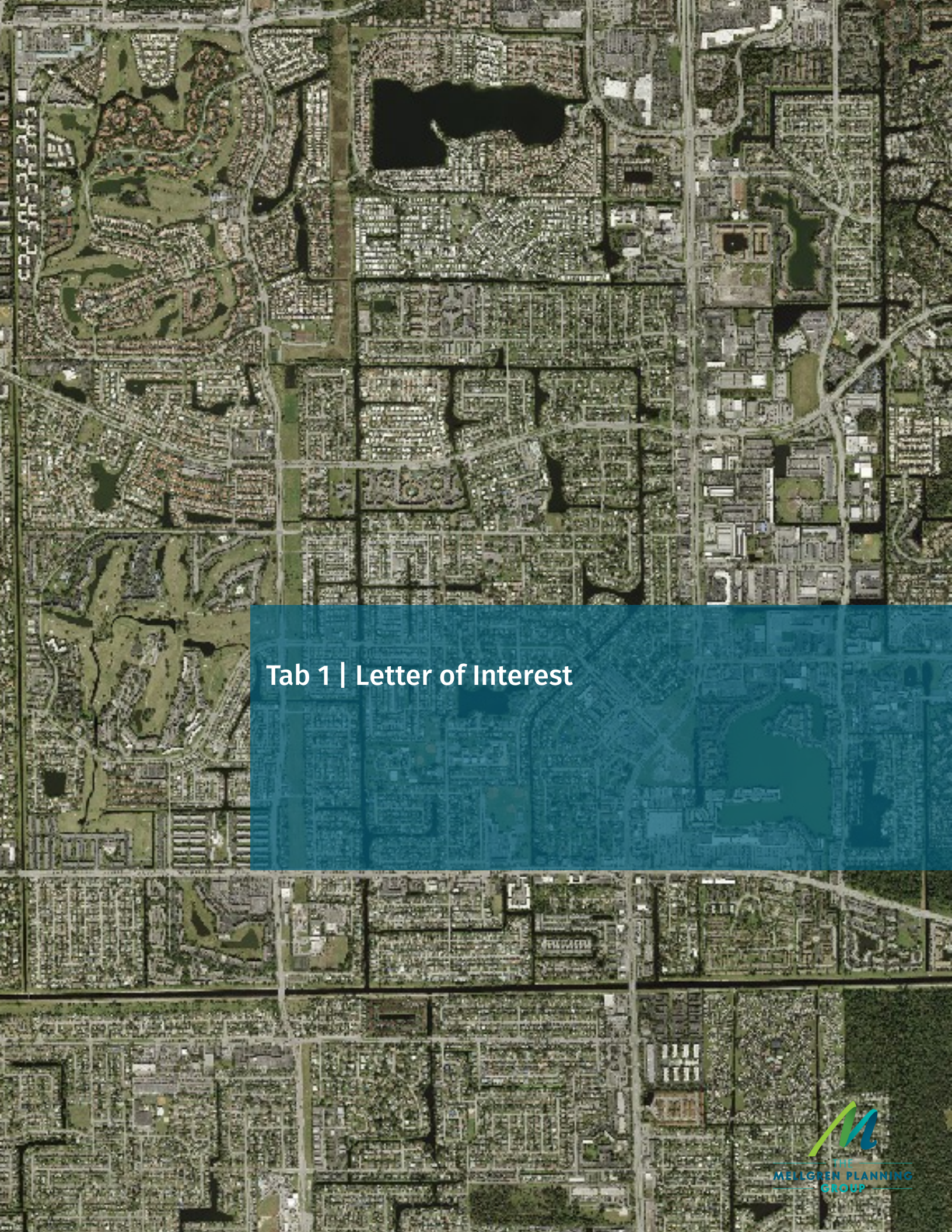
Submitted by The Mellgren Planning Group, Inc.

*with*

Analytica

*and*

Miami Economic Associates, Inc.



# Tab 1 | Letter of Interest

THE MELLGREN PLANNING GROUP

THE MELLGREN PLANNING GROUP

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Ft. Lauderdale, FL 33309
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August 6, 2018

Mr. Robert Massarelli, Director
Development Services Department
c/o Purchasing Division
City of Margate
5790 Margate Boulevard
Margate, Florida 33063

**Re: Request for Proposals No. 2018-022a | Comprehensive Plan Amendment Consulting Services**

Dear Mr. Massarelli:

The Mellgren Planning Group (TMPG) is pleased to submit our response to RFP No. 2018-022a, Comprehensive Plan Amendment Consulting Services, in partnership with Miami Economic Associates, Inc. (MEAI) and Analytica. Our submittal highlights our relevant experience and extensive qualifications to provide the services identified in the City's project scope.

TMPG is a South Florida firm established in 1998, and widely recognized for our expertise in planning, zoning, land use and urban design. Our professionals have extensive experience in providing an array of municipal planning services to local governments in Florida. TMPG has extensive experience preparing numerous full and partial comprehensive plan updates and rewrites, plan evaluation and appraisal reports - ranging from small parcels to large regional activity centers covering thousands of acres and multiple land uses, CRA Plans, and land development codes. Established in 1995, MEAI has provided real estate consulting services to developers, investors and governmental entities for over 40 years in all major uses of real estate including residential, office, retail, industrial and hotel and resort development. Analytica, established in 1991, assists local and regional governments, not-for-profit organizations, and for-profit entities with strategic planning, performance management, and facilitation services.

The requested firm information for The Mellgren Planning Group, as prime, is provided below.

Michele C. Mellgren, AICP | Owner and President
The Mellgren Planning Group, Inc.
Established in 1998
3350 NW 53rd Street, Suite 101
Fort Lauderdale, FL 33309
Phone | 954-475-3070
Fax | Not applicable
Website | www.floridaplanning.net
Email | michele@floridaplanning.net
Number of Full-Time Employees: Six (6) Urban Planning and Design Professionals and One (1) Office Administrative Professional

All TMPG staff members maintain membership with the American Planning Association. Additionally, three (3) staff belong to the American Institute of Certified Planners (AICP), three (3) are certified by the Congress of New Urbanism (CNU-A), and Ms. Mellgren is certified in charrette facilitation by the National Charette Institute (NCI). Two additional staffers have also received NCI training.

A list of publications by Analytica can be found at analyticaconsulting.co.

We are excited about the prospect of working with the City's and think you will agree that our team offers the spectrum of experience that the City of Margate seeks. Please contact me if you need any additional information as you consider our proposal. We look forward to further discussions about how we can successfully partner with you to complete the work outlined in the scope of services.

Very Truly Yours,

Michele C. Mellgren, AICP, NCI-C
President

**2018 FLORIDA PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# P98000089421

**FILED**
**Jan 10, 2018**
**Secretary of State**
**CC8206506371**

**Entity Name:** THE MELLGREN PLANNING GROUP INC.

**Current Principal Place of Business:**

3350 NW 53RD STREET
SUITE 101
FORT LAUDERDALE, FL 33309

**Current Mailing Address:**

3350 NW 53RD STREET
SUITE 101
FORT LAUDERDALE, FL 33309 US

**FEI Number: 65-0873541**

**Certificate of Status Desired:** No

**Name and Address of Current Registered Agent:**

MELLGREN, MICHELE
3350 NW 53RD STREET
SUITE 101
FORT LAUDERDALE, FL 33309 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

SIGNATURE:

Electronic Signature of Registered Agent

Date

**Officer/Director Detail :**

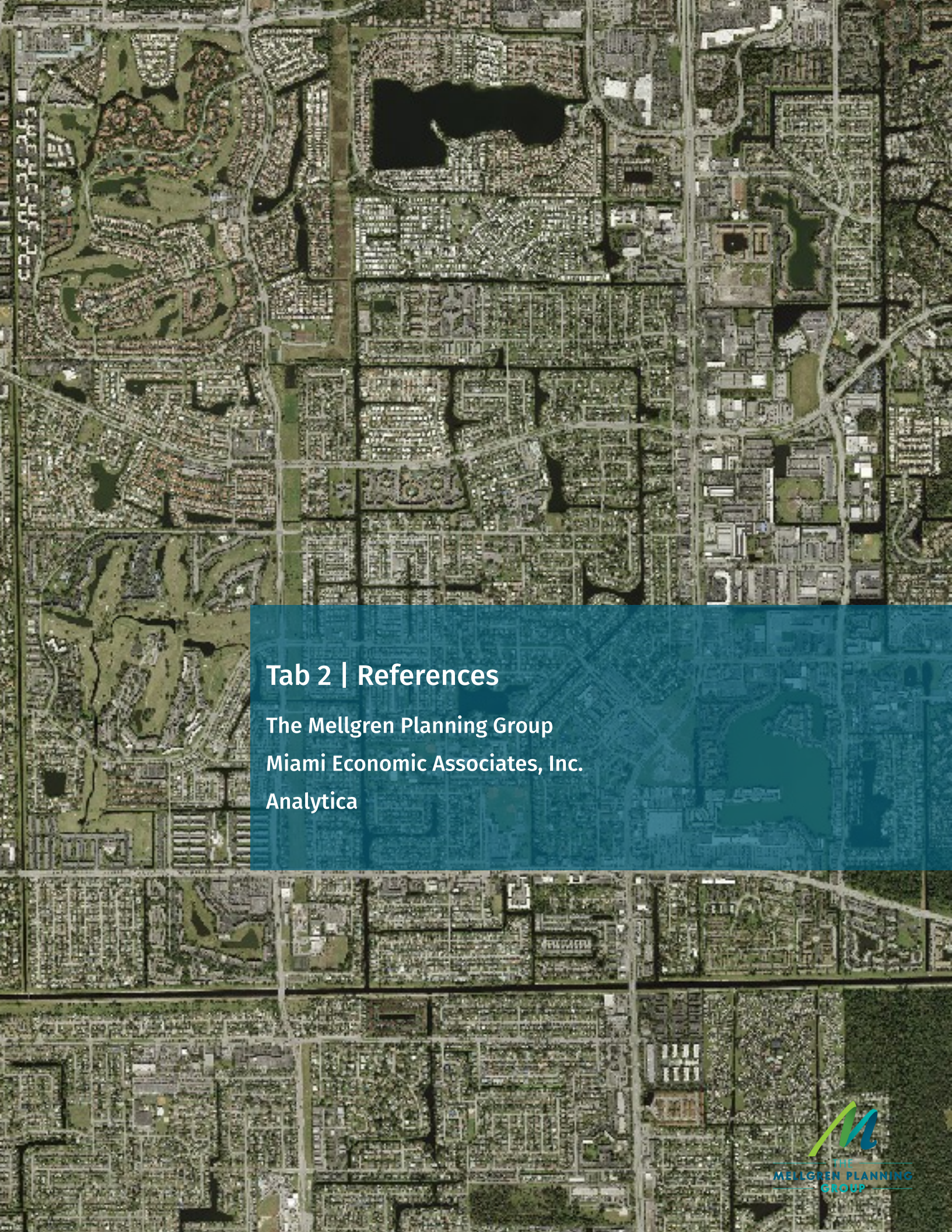
| | |
|---|---|
| Title | PSTD |
| Name | MELLGREN, MICHELE C |
| Address | 3350 NW 53RD STREET<br>SUITE 101 |
| City-State-Zip: | FORT LAUDERDALE FL 33309 |

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

SIGNATURE: MICHELE MELLGREN PSTD 01/10/2018

Electronic Signature of Signing Officer/Director Detail

Date



# Tab 2 | References

The Mellgren Planning Group

Miami Economic Associates, Inc.

Analytica

THE MELLGREN PLANNING GROUP

# References | The Mellgren Planning Group

| REFERENCE 1: | |
|---|---|
| Tanya Wilson-Sejour, AICP, Director | |
| City of North Miami | |
| 12400 NE 8th Avenue; North Miami, FL 33161 | |
| tsejour@northmiamifl.gov | 305.895.9826 |
| Project: EAR Based Amendment and Comp Plan Update (2007) and Comp Plan Update (2015). | |

| REFERENCE 2: | |
|---|---|
| Caryn Gardner-Young, Assistant City Manager | |
| City of Delray Beach | |
| 100 NW 1st Avenue, Delray Beach, FL 33444 | |
| gyoung@mydelraybeach.com | 561-243-7099 |
| Project: EAR Based Amendment and Comprehensive Plan Update (2017). | |

| REFERENCE 3: | |
|---|---|
| Andy Maurodis, Esq., City Attorney | |
| City of Parkland | |
| 6600 N. University Drive, Parkland FL 33076 | |
| amaurodis@wsh-law.com | 561-835-2111 |
| Project: EAR Based Amendment and Comprehensive Plan Update (2015-2016). | |

# References | Miami Economic Associates, Inc.

| REFERENCE 1: | |
|---|---|
| Mr. Murray Goodman or Ms. Doranne Garvin | |
| The Goodman Company | |
| 777 S. Flagler Dr., #136E; West Palm Beach, FL 33401 | |
| dgarvin@thegoodmancompany.com | 561-833-4848 |
| Project: Analysis of a big box store in Tennessee and existing regional mall in South Florida | |

| REFERENCE 2: | |
|---|---|
| Mr. Keven Klopp, Director of Development Services | |
| City of Hallandale Beach, FL | |
| 400 S. Federal Highway; Hallandale Beach, FL 33009 | |
| kklopp@cohb.org | 954-457-1375 |
| Project: Residential housing market analysis as part of an update to the City's 2 Regional Activity Centers. | |

| REFERENCE 3: | |
|---|---|
| Mr. Jake Morrow | |
| Integra Investments, LLC | |
| 150 SE 2nd Avenue, #800; Miami, FL 33131 | |
| jmorrow@integrafl.com | 305-774-0110 |
| Project: Affordable housing market analysis for a mixed-income housing development. | |

# References | Analytica

| REFERENCE 1: | |
|---|---|
| Michael Pleus, City Manager | |
| City of DeLand | |
| 120 S. Florida Avenue; DeLand, FL 32720 | |
| pleusm@deland.org | 386-626-7107 |
| Project: Community Vision and Strategic Plan. | |

| REFERENCE 2: | |
|---|---|
| Albert Childress, Deputy City Manager | |
| City of Doral | |
| 8401 NW 53rd Terrace; Doral, FL 33166 | |
| Albert.childress@cityofdoral.com | 305-593-6698 |
| Project: Strategic plan. | |

# Tab 3 | Project Understanding + Creative Concept

THE MELLGREN PLANNING GROUP

# Project Understanding

The City has reached a crossroads. The Margate Community Redevelopment Area (MCRA) Plan will sunset in less than ten years, with much work still to be done. The City is built out and needs an economic development strategy to ensure sustained fiscal health. Sea level rise is a documented reality in South Florida and must be addressed. The City Commission has directed staff to repeal the Transit Oriented Corridor (TOC) zoning regulations, but a different vision for the future has not yet been articulated.

Time is of the essence.

The Mellgren Planning Group team understands that the City desires to establish a *public consensus driven vision* for the future that addresses all these issues; continuing redevelopment, economic development, sea level rise and urban form. This must be done in a compact time frame to ensure policies and regulations are in place for any incoming development applications and, equally important, to ensure that this project gains and maintains momentum and is not side tracked or delayed by interruptions or diminished focus.

The foundation for the success of this entire project is the public consensus building aspect. TMPG staff is well trained and skilled in public participation, but this project requires a special skill beyond the norm. For this reason, we have included Dr. Herb Marlowe, principal of Analytica, to join us in this effort. Dr. Marlowe has the singular and unique ability to crisply articulate generally stated ideas or thoughts and present and assist the participant in understanding. Analytica's understanding of the role of visioning in this project is described below, along with the TMPG team understanding of the role the City envisions for the Comprehensive Plan in directing growth and development within the City of Margate.

### Vision Statement

**What is a Community Vision?** Some think a community vision is just about building and places. This is often the perception because so much of a community's planning for the future is about physical space and facilities. While a community vision process is concerned about physical design, its focus is broader. A vision process is about the type of community residents want to live in five, ten, twenty, thirty years from now. It is about the experiences one wants to have in one's community, the experiences one wants for one's children and grandchildren. It is about how one will make a living, receive an education, obtain the necessities of life, recreate and contribute. In sum it is about the values the community wants to live by, the opportunities and experiences they want to have, the legacy they want to leave.

Physical features help make these values, hopes and expectations reality. If one wants to practice a healthy lifestyle, then features such as bike paths, walking trails or a variety of other facilities are needed. If one wants to be able to enjoy arts and culture, then facilities are needed to support those activities. If one wants to limit their commute time, then spaces for local businesses and/or non-congested transport capacities are needed. Quality schools, accessible health care, ease of community movement, religious or civic engagement all require some type of space which a community vision must address.

But the physical features are not the end in themselves. They are means to ends and simply make some things easier. At the core people want to live in safe communities where they can raise their families or age-in-place, they want economic and educational opportunity, they want enjoyable activities that enrich their lives. A community vision is about how a community makes itself safe, about how it creates wealth, about how it provides those features that make for a higher quality of life, about how it helps its residents meet their needs whatever their age.

**Needs, Aspirations and Values.** The rationale for focusing on needs, aspirations and values in public dialogue is that it is a window into how people define their self-interests and what they are willing to invest in as citizens. In that sense needs, aspirations and values are the most foundational topics one can seek to understand in developing consensual vision, strategic direction and public policy. An individual's understanding of a public policy issue may be substantive or superficial and most citizens have little time to develop substantive understanding on more than one or two topics if that. Surveys that ask for positive or negative positions on public policy issues therefore are of little value in that additional information, or a re-framing of how the issue is presented, may substantively shift the response.

What people are expert in, however, are their own needs, aspirations and values. When those are well-understood and broadly shared by the populace, a viable public policy or strategic direction can be formulated. When strategic direction is informed and shaped by these most basic issues, then it is likely to be supported.

**The Significance of Community Engagement.** For a community vision to be valid and supported, it must be consistent with the needs, aspirations and values of its residents. If it is not, it will be dis-connected from the community and unlikely to draw sustained support. This is not to say that the community vision is limited by today's needs, aspirations and values. The visioning process itself may expand the community's thinking and understanding of future potential and the desired future.

**What Characterizes a Successful Community Visioning Effort?** There are several perspectives from which a vision effort can be judged successful. These include:

- The community owns the vision. It represents a future they truly want.
- The plan is truly strategic. This means it is future oriented and responsive to emerging trends. This means it is focused on the most fundamental forces, trends or events that will shape the future.
- The plan truly adds value. It represents improvement in various ways – more of desired features, less of undesirable features, higher quality, lower cost.
- The plan is adaptable. One cannot predict the longer term future with high certainty. A plan which can be adapted as events unfold is a good plan.
- The plan is owned by the persons charged with executing it. Citizens, elected officials, city staff view it as their plan and they are committed to its execution.
- The plan is understandable and memorable.

- The plan is testable. It is specific enough that one can assess progress.
- Finally, and most significant, there is execution and implementation.

This visioning process, led by Analytica, will stand in its own right, but also guide TMPG in developing a Design Statement and providing the requested updates to the Future Land Element of the Comprehensive Plan.

We understand that the City seeks to integrate the Vision Statement and Design Statement into the Comprehensive Plan elements in such a way that will ensure the long-term sustainability of Margate's quality of life, property values and economic vitality as the community overcomes the challenges of 21st Century. We also understand that the Vision Statement, Design Statement, and FLUE must be crafted in a way that is easily understood by all members of the community to communicate a shared vision for the future without requiring special training or unusual familiarity with the concepts and topics addressed. Our understanding of the City's vision for both is described below in greater detail.

### Design Statement

The design statement will utilize the findings of the community vision workshops to develop a guidance document for all future development – ensuring the built form expresses the City's values and vision. This document will provide a resource for the City and applicants alike, translating the goals and objectives of the City into guidelines for the built environment. TMPG will work with City Staff to determine the level of desired regulation, balancing between guidelines (qualitative) and standards (quantitative).

To avoid overregulating and minimizing creativity, the design statement will address the most important features of the urban form including street design, site design, and building design. The goal of the statement will be to provide direction without limiting options. A user's experience of an urban space is directly related to the quality of the built space that forms and creates place. This transformation from *space* to *place* is an important concept and relies on high quality design to create memorability.

This graphically rich document will incorporate best-practice examples to demonstrate the desired character and design elements. The requirements of the design statement will be addressed and incorporated into the future land use element (FLUE) update; and in a reciprocal manner, the goals, objectives, and policies of the FLUE will be reflected in the design statement. These two documents will build-off of each other to ensure a consistent message and application of the City's vision is applied to future development.

### Future Land Use Element

A Comprehensive Plan – particularly the Future Land Use Element (FLUE) – serves as the growth management tool for the City. While the City of Margate is primarily built-out, we envision a Plan that will go beyond the minimum State F.S. 163.3177 requirements to address the needs and desires of the community through the community-based visioning process described above. The Future Land Use Element describes existing conditions, but also provides policy guidelines that direct how the City will implement the future it envisions. We believe that a FLUE that goes beyond the State requirements will direct the City towards a high quality of

(continued) life that retain existing residents and be desirable to those within the region. Some of these aspirational areas include:

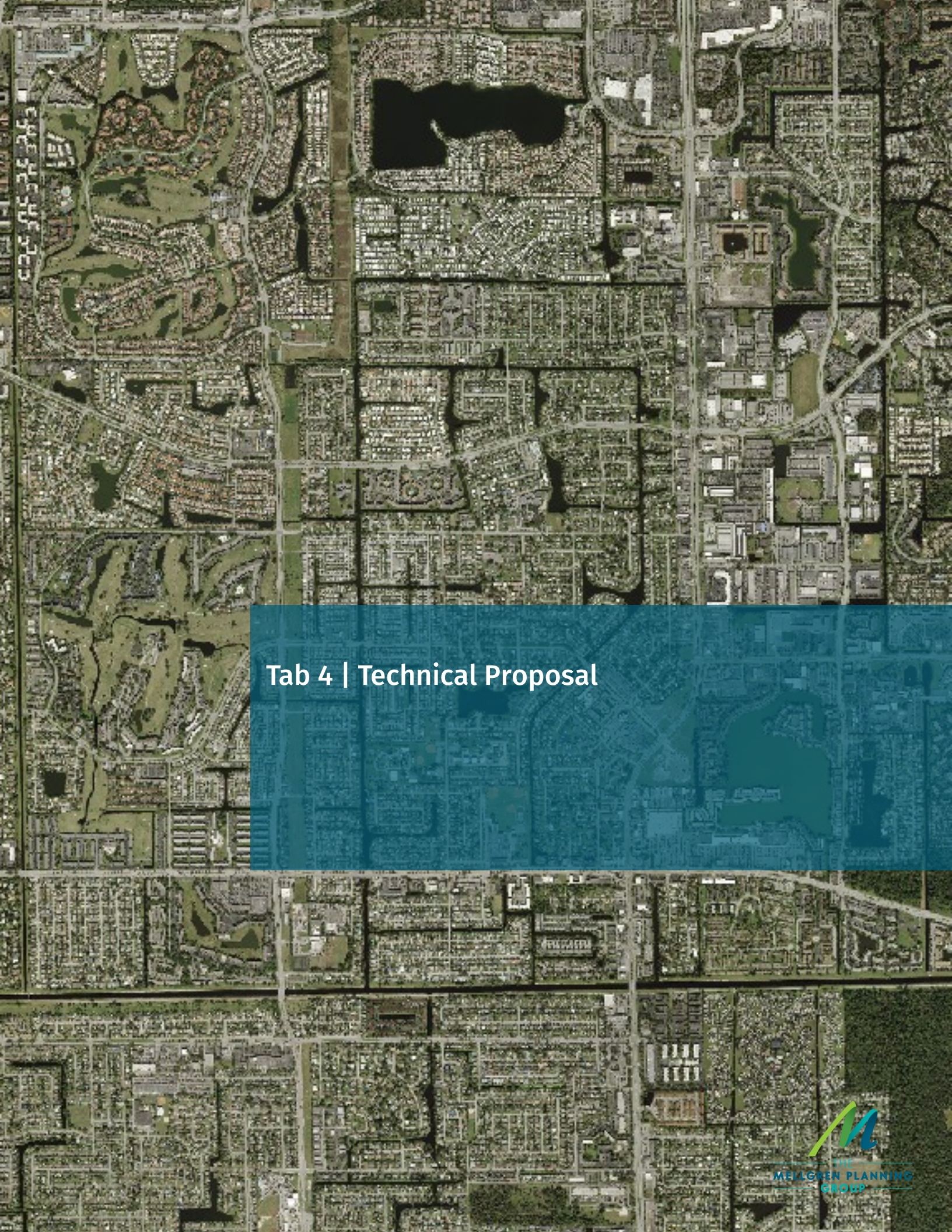
- **Economic Prosperity For All**. Economic prosperity is a key component of quality of life; and quality of life, in turn, leads to increased economic prosperity. Quality of life is generally measured based on the quality of certain community elements: neighborhoods, schools, parks, proximity to natural places for recreation, shopping opportunities, cultural and historic places, and streets that allow the luxury of walking short distances for conveniences and daily needs. Quality of life also includes vibrant communities, a robust economy and low unemployment. Appropriate future land use regulations will allow the City to direct desirable development.
- **Range of Housing Types and Neighborhood Viability.** A good neighborhood serves a mix of incomes and offers a range of appropriate housing types. The presence of middle and high-income households ensures that retail and services are also available to those of lower income.
- **Sustainability**. Sustainability can refer to ecological, economic, and social sustainability. A well thought out future land use plan will provide the foundation for each of these components.

For the City's vision for Margate's future to materialize, the Future Land Use Element must direct growth and how and where public and private investments are made. To exert this influence, the comprehensive plan must be applied as a guide to the many decisions which will determine each small increment of growth and change. While City stakeholders and elected officials will articulate their vision for growth and change during the Comprehensive Plan process, but public input in the Future Land Use Element will produce a coordinated, synergistic plan that allows citizens, neighborhood and civic organizations and private industry to embrace the City's vision.

### Dynamic Digital Version of the Comprehensive Plan

As part of communicating the City's vision to residents in an accessible way, TMPG will transform the standard text version of the Comprehensive Plan into a dynamic and engaging graphic plan that enhances the user experience by adding layers of interaction and clarification through imagery. While graphics make a plan more visually pleasing, they should be used strategically to demonstrate overarching concepts and clarify text.

TMPG's specific approach to this component of the Scope of Services is described in detail in the Technical Proposal.



# Tab 4 | Technical Proposal

THE MELLGREN PLANNING GROUP

Planning is about forecasting the future and deciding how to prepare for it. Analytical methods in planning are the best tool for policy making, and TMPG employs a variety of planning methods and techniques in its projects. TMPG has unparalleled experience in planning methods, including economic assessments, land use demand analysis, housing needs assessment, case studies, and underutilized lands assessment. All of our comprehensive plan amendments utilize professionally accepted methodologies, and are supported by appropriate data and analysis.

### Approach to Comprehensive Planning

TMPG specializes in comprehensive planning for redevelopment and economic development, and in doing so pioneered two different land use planning techniques designed to maximize redevelopment within built-out areas. The techniques include a new method of measuring land use intensity within activity centers, and creating a land use plan redevelopment area overlay (typically used only for zoning and not land use plan purposes).

Typically, our approach to evaluating a comprehensive plan begins with collecting and analyzing information and data to measure changes and trends in the community. We present our findings to staff, elected officials and stakeholders to be included in the process, and together identify issues that should be addressed in the plan update. We then perform an assessment of the existing plan as it pertains to the issues, collect additional data as needed and formulate strategies for addressing the issues, culminating with specific objectives, policies and supporting documentation. Simultaneously, we review the plan for outdated information and directives, and recommend modification or in some cases elimination. The final product that we prepare is an updated comprehensive plan, adopted through the public hearing process that is not only meaningful but fully implementable.

When undertaking any amendments to a comprehensive plan, TMPG ensures that the amendments will be internally consistent with the remainder of the comprehensive plan, and that any necessary changes triggered in the land development code are noted for updates. TMPG also has extensive experience writing and applying codes. While there are general rules of construction for both conventional and form based codes, The Mellgren Planning Group ensures that these general rules serve only as the framework and not as the generic final product, through following best practices, maintaining awareness of case law and its impact on zoning regulations, innovating in a manner that tailors each code to the particular community, clear statements of intent, and rich graphics.

Public participation is critical to developing a consensus-driven Comprehensive Plan that reflects the needs, desires and decisions of the community as a whole. Therefore, the TMPG technical approach outlines a comprehensive visioning process that will build community and stakeholder consensus. In addition to the inclusive participation strategies (described below in our approach to visioning), TMPG will work with the City to draft regular articles and/or news releases providing updates of the Comprehensive Plan process, including information about upcoming workshops and community input opportunities for dissemination on the City's website and social media accounts, and to the local media.

The Comprehensive Plan is a visionary and strategic document to guide growth, infrastructure investments, and policy decisions for short and long-term planning horizons. Implementation strategies, as outlined in the Goals, Objectives, and Policies (GOPs), are critical to the Plan's overall success. GOPs for each element of the Plan must be consistent with the overall goals and objectives identified for the Plan. As such, TMPG will establish the foundation for the rest of the plan through well-articulated policies in the FLUE that set the tone for the City's overall vision.

While the Scope of Services requests a dynamic digital version of the ***entire*** amended Comprehensive Plan, the rest of the Scope identifies only the Future Land Use Element for updating, not the other eight (8) Elements – which are outdated and could benefit from updating due to changing conditions in the City. TMPG proposes a limited update to the other elements when the updates to the FLUE create conflicts, and the production of a dynamic digital version of the Future Land Use Element ***only,*** in order to prevent rework on a document expected to change drastically in the near future. We recognize that this issue merits further discussion with City staff.

### Approach to Technological Mapping and Analysis

TMPG brings significant technical capabilities to the project through a series of tools used regularly by the firm. These competencies enable TMPG to provide rich graphics for the necessary map updates and the dynamic digital layout. Specific tools include:

- **Geographic Information Systems (GIS).** GIS provides the backbone for the display, analysis, and storage of many projects at TMPG. Our GIS staff members provide cartographic display, innovative spatial analysis, and comprehensive database design. GIS is used to support projects like detailed natural resources evaluations and master plan build-out scenarios for municipalities. In addition to internal support for other projects, GIS services and data have been provided directly to clients in order to build custom data or provide on-call mapping services. The use of GIS in support of planning work has been a successful formula for TMPG. Planning work, by its nature, lends itself to the natural capabilities of GIS to manipulate and display large amounts of spatial information. Buildout scenarios, master plan mapping, zoning updates, special district analysis and other projects highlight the use of GIS at TMPG.

- **GIS Mobile App**. TMPG has the capacity to use a mobile GIS app for field surveys of existing conditions, should the City desire a windshield assessment of the study area.

- **ESRI Community Analyst**. This provides data in tabular and map formats for easy viewing in standard geographies, ring or drive time radii, or hand-selected areas. This tool "supports commercial market analytics and noncommercial usages, such as economic development, planning, and at-risk population assessment. ESRI Demographics is accessible in four ways: dynamic web maps, data enrichment, reports,

(continued) and infographics. ESRI offers comprehensive demographic, lifestyle segmentation, consumer spending, and business content for a variety of geographic levels in the United States for use in analyzing markets and consumers, identifying underserved communities, and formulating better business decisions and policy decisions" (ESRI.com).

- **In-House Design Capabilities**. We understand the importance of a well-organized plan with rich graphics that quickly translates concepts and strategies. Our team has a full library of the most current software and tools for the purposes of mapping, diagraming, and modeling. Our staff regularly uses InDesign, Sketch-Up and Lumion 3D modeling to add graphic impact to our projects, such as fly-through animation videos to demonstrate the impact of potential redevelopment associated to proposed land use changes. All documents produced by TMPG can be exported, distributed, and uploaded in multiple formats – including the requested dynamic digital version of the Plan. As with all TMPG clients, we provide the work product in electronic format, and in printed format if requested.

Our approach to the dynamic digital version of the plan is described in detail below.

### Approach to Market Analysis (Optional)

TMPG is capable of performing an analysis of market and economic conditions identified in the Scope of Services; however, subconsultant Miami Economic Associates, Inc. (MEAI) has been added to the team to provide the City of Margate with the option to have an additional layer of analysis provided by a firm whose only specialty is in this area. Since MEAI was established in 1995, market analysis has been a core service offered by the firm. The market analysis performed for private sector clients has included analysis of all major uses of real estate including residential, office, retail, industrial, hotels and destination resorts. MEAI's public-sector assignments have also involved analysis of many the same uses; however, the two main focuses of the firm's work for cities and counties have been redevelopment planning for community redevelopment agencies and determining the need for affordable housing for both families and the elderly. If the TMPG team is selected to update the City of Margate's Comprehensive Plan, MEAI is available to serve as a subcontractor with the responsibility to perform market analysis that will serve as a basis for in-depth evaluation of the distribution of land for various uses on the land use plan map. This analysis can also inform the visioning process by helping the City, residents, and stakeholders understand the City's current and prospective economic potential. The market analysis can also serve as a resource document for updates to the Housing Element of the Plan.

The approach that MEAI uses to perform market analysis is classic in its conception; however, the particular use or uses being analyzed in a specific engagement will cause variations to occur in terms of the sources of information tapped, the specific secondary source socio-economic data considered and/or who are the people important to interview. Illustratively, job growth by economic sector has greater weight in an analysis of a prospective office or industrial uses than in the analysis of a retail use whereas consumer spending patterns in a market area are major focus of our analyses. That said, the basic structure of MEAI's market analyses consists of the following elements:

- A visit to the subject site to determine its appropriateness for the intended use, its salient characteristics in terms of such attributes as accessibility and visibility and the extent to which the neighborhood in which it is located is comprised of uses that are compatible with and/or supportive to the proposed use in terms of type, quality, price-point, etc;
- Review and analysis of the relevant secondary source socio-economic data;
- Definition of the proposed project's market area;
- Interviews with public officials and private sector individuals such a bankers, realtors and officials of community and/or business organizations that may have perceptions about the market and/or knowledge of proposed projects in the market area;
- Survey of competitive and/or comparable projects to determine their salient characteristics, market performance and user/customer base;
- Determination of the development program that is likely to have the strongest level of market acceptance;
- Projections of prospective market performance for the proposed project in terms of absorption and achievable pricing;
- Client meeting to report the findings of our analysis and reanalysis, if required; and
- Preparation of a final report.

### Approach to Public Engagement and Visioning

TMPG has an extensive record of successful public engagement, particularly with highly technical and contested projects. To ensure the highest level of public participation in the project, TMPG offers a wide array of services to support constituent outreach. TMPG typically uses some of the following tools:

- Public Workshops
- Digital Outreach
- Survey Design & Analysis
- Pop-Up Surveys/Community Input Sessions

For this engagement, TMPG will provide support to Analytica in the visioning process described below. The visioning process will be directed by Dr. Herb Marlowe, Principal of Analytica. Community visioning may be understood from a variety of perspectives. Two approaches that Analytica emphasizes are discussed below.

**Visioning As An Act of Leadership.** The execution of a visioning process and development of a shared future vision is an act of leadership, because leadership consists of envisioning future opportunities and challenges, developing strategies to meet those opportunities and challenges and ensuring those strategies are aligned with the community's needs, values and aspirations.

For leadership to be effective, it must be aligned with the community's needs, aspirations, and values. At the same time effective leadership may push those needs, aspirations, and values. It may reframe needs by assisting the community to focus on self-interest rightly understood instead of short term needs. It may expand or embolden aspirations by articulating new and challenging opportunities. Or it may call upon our "higher angels" to stress those values which better the community in the long term.

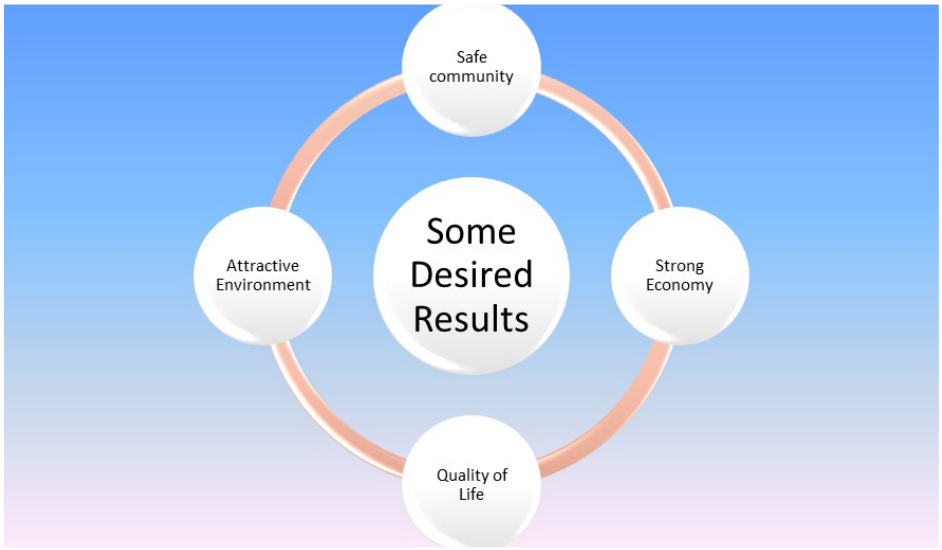
At the same time effective leadership must be reality based. It must understand current conditions, whatever the mix of positive and negative. It must understand external forces and how they impact the community. In a globally competitive environment, leadership has to realistically assess the community's strengths and weaknesses, while facing up to threats and carefully assessing opportunities.

As much as leadership must recognize today's realities, it cannot be bounded by those realities. The world always changes, and today's weaknesses can become tomorrow's strengths (and vice versa). Leadership has to envision future alternatives, better solutions, and new possibilities.

Finally, effective leadership executes. Ideas and concepts must be moved into the realities of investment, development, and programs.

**Visioning as Consensus on Results.** A well designed and facilitated vision process leads to broad community concurrence on the results the community seeks. Results are ends that the community values in and of themselves such as community safety, a prosperous local economy, access to quality of life features such as recreation, health care, arts and culture, an aesthetically attractive community, opportunities for their children, and a protected natural environment.

The key to the long-term success of a vision plan in a results-focused approach is to maintain the emphasis on results. There will of, course, be differences of perspective on any one of the above listed results. These differences should not overwhelm the broader and underlying agreement about the result. By maintaining the emphasis on results, a sufficiently broad consensus can be kept so that action occurs.




One of the strengths of a results-focused approach is its flexibility and adaptability to the future. While it generates strategies, it views strategies as simply means to an end, i.e. the desired result. Strategies come and go depending upon their effectiveness. Current and future leadership bodies are not tied to specific strategies, but rather committed to the results. The results-focused approach is not prescriptive about the ***strategies*** that future bodies should employ, but it is directive toward the ends or ***results*** they should be striving to achieve.

### *Phases of the Visioning Process*

The visioning process follows the Concentrated Events Model of Community Visioning. This visioning methodology concentrates the visioning process into two highly visible events (preceded by other less visible events). It is described as a series of phases. These phases however do overlap so this should not be seen as a rigid work sequence. The visioning process includes the following phases and events.

***Project Organization & Background Research.*** The purpose of this phase is to organize the project structure, develop an overall schedule and revise the proposed project plan. It includes specific actions, such as:

- Identification of key stakeholder groups and resources
- Establishment of web site, e-newsletter, and social media tools
- Project event scheduling
- Establishment of a steering committee or guidance group

Topics for background research include:

- Plans for the future of relevant public entities such as the County, adjacent cities, planning entities
- The City's comprehensive plan, CIP, budget, other master plans
- Demographic trends
- Interviews with real estate agents familiar with the City (residential and commercial)

***Events***. As indicated above, the visioning process is designed as a series of overlapping phases, which consist of the events described below.

***Community Engagement I - Initial Community Outreach.*** The purpose of this initial outreach phase is twofold. First, it begins the process of identifying community concerns and hopes for the future. Second, it begins the process of creating "buzz" about the vision process and generating a list of email/mail contacts who can be directly invited to the Vision Week I events. These activities include:

- **Formal Interviews**. These are interviews with identified key stakeholders who have been active in the community, have networks of their own and bring the ability to develop support for the vision. 30 to 40 persons will be interviewed including the elected officials and senior city staff.
- **Natural Site Interviews or "Pop-Up Surveys**." These are "ad hoc" interviews conducted at natural gathering places in the City such as restaurants, barber shops, beauty shops or other places where residents gather and would be available for brief interviews. With interviewee permission, these interviews may be video-taped for uploading to YouTube. 30 to 40 interviews would be sufficient to document various perspectives. The permission of the site owner is obtained to "sit" at their business for the day and briefly interview people as they come into the business.
- **Presentations**. As civic club/association schedules allow, presentations about the vision/strategic plan project will be made.

Topics to be addressed in Community Engagement 1 include:

- Features of the City the residents want to maintain
- Features of the City the residents want to change
- Key challenges facing the City
- Opportunities and key issues to be addressed
- Ideas for creating community wealth and improving the City
- Values that the residents want to build upon for the future
- A summary positioning statement which describes the preferred future community

***Community Engagement II - Vision Week I.*** Given the intense media messages of our society, and the general busyness of people's lives, it is difficult to get the attention of residents. One effective method we have found which can capture attention is to have a concentrated vision week which can be communicated to residents via various tools and can bring some media attention.

We propose that the Steering Committee select a theme of Vision Week I that communicates some significant milestone in the life of Margate. Some of the events which the Committee can consider for the week include (additional events based on the initial community outreach effort):

- **Time Capsule Contributions**. Residents can contribute photos, letters or other small materials which would be put in a time capsule to be opened at future date.
- **History/Future Time Line**. This activity requires a dedicated space for the week in which newsprint is taped to tables and a time line drawn at the bottom of the newsprint starting with the founding of the City and going to a selected future year. Residents are asked to write (in the appropriate sheet) significant events from their perspective (buildings being constructed, economic changes, historic events, community features, roads, or personal events). For the future period people write in what they think might happen. This time line can be copied for the website or used in other ways. When the project is complete, it can be placed in the time capsule.
- **Sketch the City**. This activity also requires a dedicated space for the week. In this activity an architect or draftsman listens to residents' descriptions of the physical city they would like and then develop a quick sketch (not an architectural drawing) which they agree captures their vision. These sketches are then posted at the drawing site, with a designated number. On the last day of vision week residents can come by and vote for their favorite sketch. The winning sketches are included in the time capsule.
- **Table Top Maps**. This activity also requires a dedicated space (the same space can be used for the above two events). In this activity maps of the city are placed on tables and residents can markup the maps for features they would like to see (such as bike trails for example), where they would like to see new forms of residential growth or any features they believe would make the City better.
- **Televised Panel Discussions with Call-In Capacity**. Assuming the local government television channel can technically allow a live call-in capacity, we propose evening televised panel discussions in a setting familiar to residents. The Steering Committee can select the topics. Some to be considered would be:

    - How can we grow jobs?
    - Protecting our environment – how do we do it?
    - Attracting more residents – how do we do it?
    - Creating a safer community

    This format works well with three participants chosen for their expertise and community reputation along with a moderator. After the initial discussion among the panel, residents can call in with questions or suggestions.
- **The Roadways and Transit Options of the Future**. In the same dedicated space as events listed above, we propose a visual map of future roadways, bikepaths, or transit options linking the City to the region. At certain times this mapped would be staffed for public comment.
- **Focus Groups**. During the week, various focus groups can be conducted. These focus groups will discuss questions such as: What features do we need as a city to attract more visitors, businesses, residents? How can we create more jobs? What additional services would be of value? Some of the groups that could be held include (new ones may be added as identified in the initial outreach phase):

- High school students – What would make Margate an attractive place to remain in as a resident.
- Middle school students/recreation program participants – "the city I would like to live in"
- Recreation program parents
- Senior centers
- Businesses

- **Individual Listening Sessions**. At scheduled times during the week residents can come to either the dedicated site or at various sites in the City for an individual discussion of their vision for the City. We suggest this method because some people simply do not like a town hall format.
- **Town Hall**. This will be an open-to-the-community event in which residents can come and discuss their vision of the future.

The content focus of the focus groups, individual meetings and town hall will be on:

- Features of the City the residents want to maintain
- Features of the City the residents want to change
- Key challenges facing the City
- Opportunities and key issues to be addressed
- Ideas for creating community wealth and improving the City
- Values that the residents want to build upon for the future
- A summary positioning statement which describes the preferred future community

***Community Engagement III – Additional Data Collection (Optional).*** This optional phase would be a scientific survey developed using the data from Engagement 1 and 2. Its purpose is to provide valid information about the views and preferences of a reliable sample of residents. Its value lies in ensuring the vision is consistent with the broad vision of the community.

***Community Engagement IV – Service and Experience Priorities.*** In this stage of community engagement, we seek to understand what governmental services (recreation, public safety, libraries, etc) and private sector experiences (restaurants, movies, theater, etc) the residents find to be of sufficient value that they are willing to pay for them. The issue is that we often want more than we are willing to pay for. Only by determining what we find to be so valuable to us that we will pay for it can we develop a truly executable Vision Plan. While the vision itself may cover 25 or more years, the Vision Plan must focus on what can be done in the next five years to move toward that vision. This means we must plan within realistic resource constraints.

At this stage of community engagement there should be a good contact list of residents who have indicated some interest in the future of their city. These persons will be invited to budget simulation meetings in which they will be asked to allocate a theoretical budget for public services (with the numbers scaled to make the discussion easier).

This simulation is developed by and with City staff to ensure its realism. It will focus on general choice categories such as law enforcement, fire, recreation, etc.

Concurrent with the budget simulation meetings, a survey of city services in which respondents are asked to rate services based on a preference level (such as Corolla, Camry, Lexus) can be conducted. This survey should be available both on the web and as a paper copy at the simulation meetings.

This is one of the most significant conversations of the process. In this conversation the topic is frame the conversation as one of citizenry. You own this community. What do you want it to be? What are you willing to invest to make it so? What activities are you willing to support to make it the desired community?

***Community Engagement V – The Vision Summit.*** Based on all the prior work, a vision summit will be held to conclude the visioning process. This summit can be configured in various ways to enable maximum participation while at the same time ensuring participation of public, private and non-profit entities whose commitment is key to successful implementation of the vision.

Based on all the data collected, alternative vision statements and a more detailed positioning statement will be developed and distributed prior to the summit. The summit itself will endorse final language.

The final product from the Vision Summit will be presented to the City for adoption or modification.

### Approach to the Dynamic Digital Version of the Comprehensive Plan

It is our intent to provide the City with two forms of the final deliverables, noting that the graphic version may not always be the best option, especially if constituents have limited access to technology and large quantities need to be printed for distribution. The first version of the deliverables will be in word format. This format should be presented to Commission for adoption. Not only will this allow for an earlier adoption date, by avoiding the large work block needed to place the document into its final graphic format, but it will also avoid re-work if the Commission has recommended changes. Changing text in a graphic document has challenges that are more significant and are more time consuming due to required layout modifications.

The second format, the graphic plan, will be prepared after the adoption date. If the text remains the same as approved by DEO, there is no issue with altering the presented format. During the deliverable production process, TMPG will prepare three template options each with varying formats, orientation, and font packages. The final selection can be refined and modified as needed. Once a template is selected and the text document is complete, TMPG will “story board” out the graphic document – assigning text blocks and graphics to chapters and pages. Throughout the research and analysis phase, TMPG will collect images in the City as needed to use in the final plan. Images already on file with the City can also be used. Any required explanative graphics will also be produced during this phase.

TMPG will use a communal software to produce the graphic version of the plan so that it may continue to be updated by City Staff as needed in the future. The final plan will be a reflection of the vision statement and the themes and values identified through the public process. The dynamic plan will be searchable and include internal links for definitions and additional reference sections. Based on the City's vision, additional interactive features can be incorporated for an additional fee including but not limited to pop-ups, MP4 files, and interactive maps.

After the adoption date, we anticipate the final graphic production to take approximately two to three weeks. This time frame will need to be extended if additional elements are requested. The final digital files will be provided to the City to post on the City website as requested. TMPG will work with City staff to ensure the document format is compatible with the website hosting platform. Once posted, the final graphic document will ensure the City's vision for the future is easily understood, interpreted, and applied for all future development.

### Milestone Schedule

The milestone schedule that illustrates the total project time in weeks is provided on the following page.

# Technical Approach (Milestone Schedule)

THE MELLGREN PLANNING GROUP

| TASKS | WEEKS | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1-4 | 5-8 | 9-12 | 13-16 | 17-20 | 21-24 | 25-28 | 29-32 | 33-36 | 37-40 | 41-44 | 45-48 | 49-52 | 53-56 | 57-60 | 61-64 | 65-68 | 69-72 |
| **Assessment of Existing Conditions and Public Input** | | | | | | | | | | | | | | | | | | |
| Develop Public Involvement Plan (1st and 2nd Drafts) | | | | | | | | | | | | | | | | | | |
| City Staff Review (Draft #1) and Approval (Draft #2) | | | | | | | | | | | | | | | | | | |
| Implementation of Public Involvement Plan | | | | | | | | | | | | | | | | | | |
| Summary of Ongoing Public Participation Program and Results | | | | | | | | | | | | | | | | | | |
| Draft Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Limited Amendments to Other Plan Elements | | | | | | | | | | | | | | | | | | |
| Staff Review and Comments: Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Final Draft: Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Schedule for Amendment Adoption Process | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Vision Statement** | | | | | | | | | | | | | | | | | | |
| Public Engagement Process | | | | | | | | | | | | | | | | | | |
| Project Orientation & Background Research | | | | | | | | | | | | | | | | | | |
| Community Engagement 1: Initial Community Outreach | | | | | | | | | | | | | | | | | | |
| Community Engagement 2: Vision Week | | | | | | | | | | | | | | | | | | |
| Community Engagement 3: Additional Data Collection | | | | | | | | | | | | | | | | | | |
| Community Engagement 4: Service & Experience Priorities | | | | | | | | | | | | | | | | | | |
| Community Engagement 5: The Vision Summit | | | | | | | | | | | | | | | | | | |
| Draft Vision Statement | | | | | | | | | | | | | | | | | | |
| City Staff Review & Comments - Draft Vision Statement | | | | | | | | | | | | | | | | | | |
| Final Draft: Vision Statement | | | | | | | | | | | | | | | | | | |
| Integration Strategy with Zoning Code & CRA Plan | | | | | | | | | | | | | | | | | | |
| Narration of Future Planning and Zoning Focus | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Design Statement** | | | | | | | | | | | | | | | | | | |
| Draft Design Statement | | | | | | | | | | | | | | | | | | |
| City Staff Review & Comments - Draft Design Statement | | | | | | | | | | | | | | | | | | |
| Final Draft: Design Statement | | | | | | | | | | | | | | | | | | |
| Integration Strategy for Zoning Code & CRA Plan | | | | | | | | | | | | | | | | | | |
| Narration of Future Design Goals and Objectives | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Future Land Use Element** | | | | | | | | | | | | | | | | | | |
| 10 Final Copies of Draft Amended Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Dynamic, Digital Version of the Entire Amended Comp Plan | | | | | | | | | | | | | | | | | | |
| Future Land Use Element ONLY | | | | | | | | | | | | | | | | | | |
| Vision Statement | | | | | | | | | | | | | | | | | | |
| Design Statement | | | | | | | | | | | | | | | | | | |
| All Other Elements (Optional) | | | | | | | | | | | | | | | | | | |
| **Meetings With Staff and Monthly Reports** | | | | | | | | | | | | | | | | | | |
| Monthly Written Update | | | | | | | | | | | | | | | | | | |
| In-Person/Conference Call Team Meetings With City | | | | | | | | | | | | | | | | | | |

# Tab 5 | Experience + Qualifications

THE MELLGREN PLANNING GROUP

# Experience & Qualifications

THE MELLGREN PLANNING GROUP

## Summary of Comprehensive Planning Experience

The TMPG team provides a unique set of skills and experience that deems us most suitable for the services outlined in the Scope of Services, and distinguishes us from other consultant teams. Our combination of team experience and expertise yields work products that are far beyond the ordinary.

TMPG has updated numerous comprehensive plans and undertaken dozens of comprehensive plan map and text amendments, ranging from small parcels to large regional activity centers covering thousands of acres and multiple land uses. The following is a list of clients for whom TMPG has provided these comprehensive planning services:

- City of Parkland
- City of Wilton Manors
- City of Tamarac
- City of Lauderdale Lakes
- City of North Miami
- Miami Shores Village
- City of North Miami Beach
- City of Bunnell
- City of Miami Springs
- City of Lynn Haven
- City of Sunrise
- Town of Southwest Ranches
- Town of Davie
- City of Hallandale Beach
- City of Delray Beach

All of the comprehensive planning efforts we have undertaken have met with success at the Broward County and DEO review level, including EAR based amendments, text amendments, and future land use map amendments In addition, we have completed other comprehensive plan amendments within the past five years (approximately) that have also been found sufficient by DEO. These have included, for example:

- Three text amendments for Southwest Ranches: changed permitted uses, established new land use category, and changed intensity standards.
- Amended the Regional Activity Center (RAC) land use text for Dania Beach to increase intensity. Persuaded Broward County Planning Council to allow calculation of intensity by acreage rather than percentage of site coverage (never previously done).
- Amended the Pompano Beach Plan text and future land use map to establish an RAC and successfully persuaded the [then] DCA that the several hundred thousand square feet of additional development had negligible impact.

In the past several years, TMPG has focused on redevelopment and economic development issues. We hone in on economic development drivers that will spur redevelopment, create jobs and help grow the local economy. We have accomplished this through land use analyses and policy development, economic impact analyses, and through preparing a variety of differing types of zoning and land development regulations for implementation. In no small part, our success is due to our ability to craft creative solutions to address complex issues.

# Experience & Qualifications

THE MELLGREN PLANNING GROUP

## Summary of Experience With Economic & Market Analysis

Miami Economic Associates, Inc. (MEAI) will perform all Economic and Market Analysis applicable to the scope of services. Firm principal, Mr. Andrew Dolkart will perform work on this project. Mr. Dolkart has provided real estate consulting services to developers, investors and governmental entities for over 40 years. His many consulting assignments have involved all major uses of real estate including residential, office, retail, industrial and hotel and resort development. His professional activities have been primarily focused on real estate projects in Florida, the Caribbean, Mexico, Central and South America. Under the direction of Mr. Dolkart, MEAI is able to provide the following services:

- Market research;
- Financial feasibility analysis;
- Development programming;
- Economic/fiscal impact analysis;
- Economic development strategy formulation;
- Acquisition due diligence;
- Economic valuation analysis;
- Preparation of financing packages;
- Financial structuring analysis;
- Zoning advocacy; and
- Litigation support, including expert witness testimony.

## Summary of Visioning Experience

Herbert Marlowe, Ph.D., the principal of Analytica, is a specialist in process architecture and facilitation with over 30 years of consulting experience. He combines expertise in process facilitation, creative thinking, conflict resolution and group decision making to help his clients develop consensus on effective strategies to achieve their desired results.

Dr. Marlowe is one of Florida's most experienced public sector consultants in the fields of community visioning and strategic planning. He has developed vision and strategic plans for cities such as Orlando, Pompano Beach, DeLand, St. Augustine, Naples, Longboat Key, Doral, Fort Walton Beach, Round Rock, TX and for Florida counties such as Pinellas, Hillsborough, Polk, Palm Beach, Charlotte and Lee. In addition to his facilitation work in these areas, he is highly skilled in consensus building around sensitive or controversial topics. His work in this arena led to the development of Tampa Bay Water as a solution to a serious water crisis, a plan for the restoration of the Kissimmee River that involved multiple private stakeholders as well as public agencies as well as redevelopment projects in cities such as St. Petersburg, FL, Fort Walton Beach, FL and Worthington, OH.

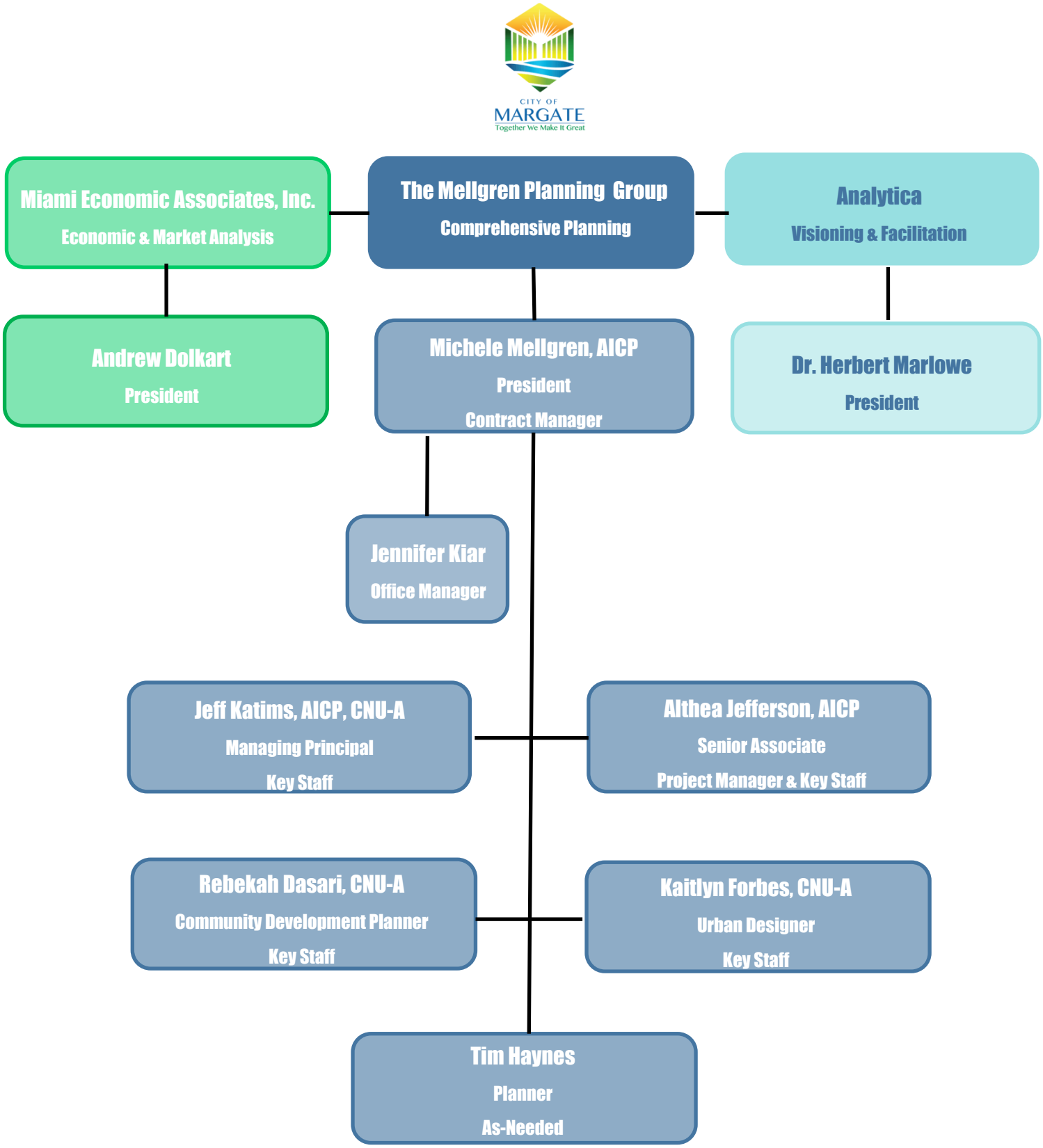
He has worked with both built-out cities and cities with extensive land under development. He has worked on redevelopment strategies as well as economic development strategies, downtown development and development of new, multi-use projects. He has worked with Community Redevelopment entities, downtown development entities, transportation and water supply entities.

He is conversant with the South Florida region and Broward County in particular having done work for Broward County Government, Pompano Beach, Deerfield Beach, Hollywood, Cooper City, Davie, Lauderdale Lakes, and the Broward Children's Services Council.

# Experience & Qualifications

## Organizational Chart

The project team organization is portrayed below.



# Experience & Qualifications

THE MELLGREN PLANNING GROUP

## Basic Approach to Team Organization

Michele C. Mellgren will serve as the overall Contract Manager, with Althea Jefferson, AICP serving as the Project Manager. Ms. Jefferson will be the point of contact throughout the project, and she will coordinate all activities with key staffers and subconsultants.

As discussed in the Technical Approach, TMPG has a strategic quality control method that is implemented for each project. A senior staff member is always assigned as Project Manager, and the Project Manager may delegate tasks to other TMPG team members, maintaining an advisory role and conducting quality reviews. The Project Manager also assigns a Peer reviewer for all work products.

A summary of team member skills and roles is provided below.

### *The Mellgren Planning Group (Prime)*

**Michele Mellgren, AICP, President, Contract Manager.** Ms. Mellgren offers more than 30 years of public and private sector experience in urban planning, zoning and land use, and public participation.

**Jeff Katims, AICP, CNU-A, Managing Principal, Key Staff.** Mr. Katims offers 22 years of professional planning experience in urban planning, zoning, and land use, with a focus and specialization in code writing.

**Althea Jefferson, AICP, Senior Associate, Project Manager and Key Staff.** Ms. Jefferson offers over 20 years of public sector planning experience in comprehensive planning, land development regulations, neighborhood planning, community participation, jurisdictional planning agreements, intergovernmental coordination, permitting, development review, development agreements, and working with the general public, community organizations, executive leaders, and elected officials.

**Rebekah Dasari, CNU-A, Community Development Planner, Key Staff.** Ms. Dasari offers 10 years of public sector skills in long and short range planning, development review, redevelopment, community development, and economic development planning.

**Kaitlyn Forbes, CNU-A, Urban Designer, Key Staff.** Ms. Forbes offers 4 years of private sector experience in urban design, urban planning, zoning and land use.

**Timothy Haynes, Planner, As-Needed.** Mr. Haynes offers 2 years of professional planning experience providing planning reports including data analysis, population and employment projections, traffic reports and mitigation strategies, pedestrian and urban design inclusionary principles, and implementation strategies.

### *Miami Economic Associates, Inc.*

**Andrew Dolkart, Principal, Economic & Market Analysis**. Offers over 40 years of experience in real estate consulting services to developers, investors and governmental entities.

### *Analytica*

**Herbert Marlowe, Ph.D.**, **Principal**. Offers over 30 years experience in process architecture and facilitation, combining expertise in process facilitation, creative thinking, conflict resolution and group decision making to help clients develop consensus on effective strategies to achieve their desired results.

Resumes for all staff members are provided at the end of this section.

### Similar Projects

Detailed examples of comprehensive planning projects, community visioning, and economic analysis are provided below.

### *The Mellgren Planning Group (Prime)*

**Comprehensive Plan Update**
**City of Parkland, FL**
**Project Dates:** 2015-2016

The City desired to amend the Goals, Objectives, and Policies (GOPs) of the Comprehensive Plan, as required by F.S. 163.3191 to reflect changes in state statutes. Also, optional updates were made to the Capital Improvements, Community Facilities, Conservation, Future Land Use, Infrastructure, Parks and Open Spaces, and Transportation Elements data, inventory, and analysis along with optional additional changes to the Goals, Objectives, and Policies.

Due to annexation of 2938.7 acres from Palm Beach County since 2007, the City also requested and update to the Data, Inventory and Analysis (DIA) of the Comprehensive Plan. The newest data was integrated into the Capital Improvements, Community Facilities, Conservation, Future Land Use, Infrastructure, Parks and Open Spaces, and Transportation elements. TMPG also updated the thirty-eight (38) maps in the Future Land Use, Transportation, Infrastructure, Conservation, and Parks and Open Spaces elements, streamlining the presentation and combining maps where appropriate. Maps were made in Esri ArcGIS and Photoshop. Challenges to the Comprehensive Plan update centered on the lack of data integration associate with the annexation. The Broward County data required for the update had not been updated yet to include the areas from Palm Beach County. Many maps and data tables in the Data, Inventory, and Analysis section required data acquisition and analysis from both Broward and Palm Beach County.

The update to the Comprehensive Plan coincided with the required update to the 10-Year Water Supply Facilities Work Plan. Updates are required every five (5) years within eighteen (18) months of revisions to the regional water supply plan. TMPG updated the entire Water Supply Plan to reflect the changes to state statutes and the changes to the geographic area and population. The Plan evaluated the ability of providers to meet the projected demands for future raw and treated water. One of the challenges associated with this update was the number of municipalities and private service providers in the City. The City has one (1) municipal provider,

(continued) one (1) private utility, an improvement district, and extensive private wells. Only the municipal service provider is obliged to prepare a Water Supply Plan. Data was culled from provider permits and the most recent available data. The entire Water Supply Plan was adopted into the Infrastructure Element by reference.

TMPG was responsible for transmittal to the Department of Economic Opportunity and the response to the Objections, Recommendations, and Comments (ORC) report. Comments on the submitted update were minor, and the update to the GOPs and DIA were completed ahead of schedule.

**Comprehensive Plan Update**
**City of North Miami, FL**
**Project Dates:** 2007-2008, and 2015

In 2007, TMPG devised and facilitated the City's visioning process for the redevelopment of its major corridors. TMPG utilized active facilitation to both engage and educate the participants in the advantages and disadvantages of various development patterns and density and intensity levels. As a result, the citizens overwhelmingly supported the resulting development strategy.

The City's growth and development potential was limited by inadequate potable water facilities. To address the issue, TMPG pioneered a redevelopment overlay strategy within the Future Land Use Plan that provided the recommended density and intensity without any capital water supply or treatment improvements. The overlay strategy, along with three additional mixed use land use categories, provided for allocation of development density and intensity in accordance with new urban principles for creating quality neighborhoods and corridors, as well as a town center. This Plan update reflected changes in state requirements, as well as the Data and Analysis and associated policy changes in the and Goals, Objectives and Policies section of the Plan.

Again in 2015, TMPG amended the Comprehensive Plan to reflect changes in state requirements. The project also targeted specific areas in the City's Comprehensive Plan, including new policies in transit oriented development, climate change, economic development and transportation.

Due to the City's interest in promoting development along certain corridors, the Comprehensive Plan, City Staff requested a series of 3D models to envision the proposed changes to the Future Land Use Map. This series was developed to show the potential massing, shadow impacts, and effects on transitions into single-family neighborhoods. As a result of this study, TMPG made recommendations regarding increased heights along the City's primary corridors that fostered growth, while respecting the existing urban fabric. This led to policy revisions within the Goals, Objectives and Policies of the Comprehensive Plan, which TMPG drafted. The entire process was taken through a series of public meetings, feedback from staff and elected officials, and edits in response to the Department of Economic Opportunity (DEO) Objections, Recommendations and Comments (ORC) Report until the final transmittal to DEO.

**Comprehensive Plan Update**
**Delray Beach, FL**
**Project Dates:** 2017

The Mellgren Planning Group was brought on to replace another firm in the early stages of the City of Delray Beach Comprehensive Plan overhaul, entitled Always Delray. This included a restructuring of the Goals, Objectives, and Policies; Data, Inventory, and Analysis, and mapping (of both required and optional maps). The project consisted of updates to the required elements, as well as the addition of new optional elements: Economic Development, Healthy Communities, Historic Preservation, and Sustainability and Resilience (as sub-elements in the Conservation Element). After 9 months of work on the project, the City ultimately decided to bring the project in-house due to internal scheduling and project management factors. Prior to the City bringing the project in-house, TMPG made 75% updates to the Capital Improvements, Future Land Use, Intergovernmental Coordination, and Public Facilities Elements; 50-75% updates to the Coastal Management, Economic Development, Housing, Open Space and Recreation, and Transportation Elements; 50-75% drafts of the Conservation, Sustainability, and Resilience, Education, Healthy Communities, and Historic Preservation Elements. This included mapping; updates to the data and analysis; updates to the goals, objectives, and policies; and updates to the overall structure of the document to make them user-friendly and provide connection to industry best practices.

### *Miami Economic Associates, Inc. (Subconsultant)*

Examples of economic and market analysis projects completed by MEAI are provided below.

**Retail Market Analysis**
**The Goodman Company**
**Project Dates**: 2018

Due to the structural changes occurring in the retail sector, Miami Economic Associates, Inc. has been engaged twice in the last six months to assess the impact of the internet on existing retail facilities including a big box store in Tennessee and an existing regional mall in South Florida. With respect to the latter, we analyzed the potential of adding non-retail uses to the mall with the purpose of converting it into a “town center”. Among the uses considered were office space, rental apartments and a hotel as well as increased entertainment uses. In addition to evaluate the extent to which market supports would exist for these new uses, we made recommendations regarding the type of facilities that should be developed to create synergy and compatibility between them and the existing retail space.

**Affordable Housing Market Analysis**
**Integra Investments, LLC**
**Project Dates:** 2018

Miami Economic Associates, Inc. recently performed market analysis for a proposed new rental apartment project in the Allapattah section of the City of Miami that that will offer portions of its units rents affordable to very low- and low-income households and its market rate units at rents accessible to workforce-income households. Key issues addressed in the study were the need for affordable and workforce units in the subject's projects market area, the current rent levels being achieved in the area and sizing of the proposed units. Also considered was whether the specific area in which the proposed project would be located had an adequate level of supporting retail and service businesses.

**Residential Market Analysis**
**Director of Development Services**
**Project Dates:** 2016

Working as a subcontractor to The Mellgren Planning Group, Miami Economic Associates, Inc. (MEAI) analyzed the need for additional residential units in the City of Hallandale's two Regional Activity Centers (RAC's), which encompass all the City with the exception of the area immediately to the east of the Intracoastal and the portion of the City located on the barrier island. As part of our analysis, we created in-depth profiles of the population and households currently living in the RAC's in terms of their socio-economic characteristics as well as of the existing housing stock in terms of the types and tenure of the units and their financial characteristics. We also estimated the need that will exist for additional units by unit type taking into consideration the normative level of demand as well as the likely increased level of demand that would result from the fact that the City of Hallandale Beach was at the time of the analysis expected to experience an unprecedented level of new office, retail and hotel development. (Note: The results of the analysis prepared by The Mellgren Planning Group with MEAI's assistance has never been formally accepted by the City Commission. During the period in which the work was performed, the City Commission underwent significant change. The newly-added members were less interested in new development occurring within the City than their predecessors.)

THE MELLGREN PLANNING GROUP

***Analytica (Subconsultant)***

Examples of visioning projects conducted by Analytica are provided below.

**Community Vision and Strategic Plan**
**City of DeLand**
**Project Dates:** Annually Since 2015

Analytica facilitated a comprehensive community engagement process that generated a vision for the City that was endorsed by the City Commission. This included town hall meetings, focus groups, surveys and individual interviews. The firm then developed a strategic plan to achieve the vision. Each year the firm has updated the strategic plan.

**Strategic Plan**
**City of Doral**
**Project Dates:** Annually Since 2016

Analytica developed a strategic plan for the City using a variety of public engagement sources developed prior to its engagement. Doral is a rapidly growing City that is developing an urban downtown in a transition from a golf course community to a multi-faceted urban community. The plan addressed a number of public priority areas as articulated by the elected officials that would help this transition succeed. The firm has updated this plan annually over a three-year period.

# Resumes | The Mellgren Planning Group (Prime)

THE MELLGREN PLANNING GROUP

**MICHELE C. MELLGREN, AICP**

PROFESSIONAL QUALIFICATIONS

## EDUCATION

Master's Degree: Urban and Regional Planning
The George Washington University, Washington, D.C.
Concentration: Urban Design

Bachelor of Arts Degree: Fine Arts
The George Washington University, Washington, D.C.
Concentration: Design

Charrette Facilitation and Management: Full Certification
National Charrette Institute, Portland, OR

## PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS

**American Institute of Certified Planners (AICP)**
Membership Number 012361 – Effective 1996
This is the highest level of earned professional planning certification

**American Planning Association (APA) – National Chapter**
Membership 057672 - Effective 1986

**Florida American Planning Association (FAPA)**
Membership effective 1989

**Broward County Section of American Planning Association (BAPA)**
Membership effective 1989

## AFFILIATIONS

Broward County Section of American Planning Association Board Member (2000-2001)
Broward County Marine Advisory Committee County Commission Appointee (1995)
Northern Virginia Transportation Committee (1987-1989)

## AWARDS OR RECOGNITIONS

Florida Department of Community Affairs (2004)
*Invited member of the Department of Community Affairs' Evaluation and Appraisal Report Technical Advisory Committee*

City of Fort Lauderdale, FL (2001)
*Requested to provide professional leadership to planning department on interim basis*

Habitat for Humanity Harmony Village-Certificate of Appreciation (1996)
*Community volunteer efforts*

Broward County Board of County Commissioners-Certification of Appreciation (1996)
*Community volunteer efforts*

City of Fort Lauderdale-Certificate of Appreciation (1995)
*Community volunteer efforts for participation in American Assembly for the New Century*

South Florida Marine Industries Association Boatee Award (1994)
*Excellence in supporting and promoting the industry in the City of Fort Lauderdale*

International Federation of Housing and Redevelopment Officials, Budapest, Hungary (1985)
*International award recipient representing United States in competition against 23 other nations for excellence in plan design for the redevelopment of post-World War II housing*

International Association of Housing and Redevelopment Officials, Washington, D.C. (1985)
*National recipient for excellence overall plan and site design for redevelopment of post-World War II housing*

**TEACHING OR LECTURING**

Guest Panelist-Palm Beach County Planning Congress, Inc., Palm Beach, FL
*Ethics and Planning* (2011)

Guest Panelist-Florida Planning & Zoning Association Annual Conference, Naples, FL
*Utilizing and Managing Planning Consultants* (2011)

Guest Lecturer-Barry University Planning Class. Davie, FL
*Introduction to Zoning Regulations and Site Plan Review (2009)*

Guest Lecturer-Florida Atlantic University Urban Planning Department, Davie, FL
*Overview of Urban Planning in Local Government* (1996)

Guest Panelist -International Marina Institute International Conference, Atlanta, GA
*Land Use and Environmental Compatibility of Marinas with Live Aboard Vessels* (1993)

Guest Lecturer- International City Manager's Assoc., South Padre Island, TX
*Redevelopment Efforts and Controlling the Effects of Spring Break* (1990)

**GENERAL MUNICIPAL PLANNING SERVICES CONTRACTS**

Miami Shores Village, Miami Dade County, FL (2008 – 2009)

City of Wilton Manors, Broward County, FL (2012 – 2013)

Town of Orchid, Indian River County, FL (2015 – 2016)

Town of Southwest Ranches, Broward County, FL (2000 – Present)

City of Lauderdale Lakes, Broward County, FL (2007 – Present)

Town of Davie, Broward County, FL (2012 – Present)

City of Parkland, Broward County, FL (2013 – Present)

City of Hallandale Beach, Broward County, FL (2013- Present)

City of Miramar, Broward County, FL (2015 – Present)

City of Deerfield Beach, Broward County, FL (2015 – Present)

City of Delray Beach, Palm Beach County, FL (2016 - Present)

North Miami Beach, Miami Dade County, FL (2003-2006 +/-)

**DEVELOPMENT REVIEW SERVICES**

City of Wilton Manors, Broward County, FL (2012 – 2013)

Town of Southwest Ranches, Broward County, FL (2000 – Present)

City of Lauderdale Lakes, Broward County, FL (2007 – Present)

City of Parkland, Broward County, FL (2012 – Present)

City of Hallandale Beach, Broward County, FL (2013 – Present)

Town of Orchid, Indian River County, FL (2015 – Present)

City of Miramar, Broward County, FL (2015 – Present)

Village of Estero, Lee County, FL (2016 – Present)

City of Delray Beach, Palm Beach County, FL (2016 - Present)

**AUTHORED ZONING CODES AND LAND DEVELOPMENT REGULATIONS**

City of Parkland, Broward County, FL
*Participated in preparing new land development regulations (2015)*

City of Miami Gardens. Miami-Dade County, FL
*Prepared urban design regulations (2010)*

Town of Loxahatchee Groves. Palm Beach County, FL
*Prepared entire unified zoning and land development regulations (2010)*

Miami Shores Village. Miami-Dade County, FL
*Prepared entire unified zoning and land development regulations (2008)*

City of Tamarac. Broward County, FL
*Prepared regulations to address possible golf course conversion (2006)*

City of Oakland Park. Broward County, FL
*Prepared regulations to address land use compatibility and community appearance (2007)*

Town of Southwest Ranches. Broward County, FL
*Participated in preparing Unified Land Development Code (2004)*

Town of Lauderdale-By-The-Sea. Broward County, FL
*Participated in preparing entire unified land development regulations (2003)*

City of Wilton Manors. Broward County, FL

*Participated in preparing entire unified zoning and land development regulations (2003)*

City of Boynton Beach. Palm Beach County, FL
*Prepared new zoning districts to implement redevelopment plan (2001)*

City of Dania Beach. Broward County, FL
*Created new Industrial-Research-Office Commercial District and related land development regulations for adoption by the City of Dania Beach (2001)*

Town of Davie. Broward County, FL
*Created new zoning districts, new zoning standards and land development regulations (1994-1998)*

**EXPERT WITNESS TESTIMONY**

Ms. Mellgren has qualified as an expert witness in Circuit Court in the 17th Judicial District. She has served as an expert witness in the following municipalities:

City of Deerfield Beach, FL (*2008)*

Port St. Lucie, FL (*2013-2014)*

St. Lucie County, FL (*2015)*

Martin County, FL (*2015)*

City of Pompano Beach, FL (*2015-2016)*

Town of Orchid, FL (*2015-2016)*

Village of Estero, FL *(2016)*

City of Delray Beach, FL (*2016)*

City of Fort Lauderdale, FL (*2016)*

**CO-AUTHORED REDEVELOPMENT PLANS AND COMPREHENSIVE PLANS**

"Regional Activity Center", City of Hallandale Beach, FL (2016)

"Comprehensive Plan", City of Parkland, FL (2015)

"Comprehensive Plan", City of North Miami, FL (2015)

"Westside Master Plan", City of Dania Beach, FL (2009)

"Community Redevelopment Plan", City of Dania Beach, FL (2008)

"Comprehensive Plan", City of North Miami, FL (2008)

"Comprehensive Plan" City of Tamarac, FL (2008)

"Comprehensive Plan", City of North Miami Beach, FL (2007)

"Comprehensive Plan", Miami Shores Village, FL (2007)

"Federal Highway Corridor Plan", Pompano Beach, FL (2006)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Sunrise, FL (2006)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Parkland, FL (2006)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Tamarac, FL (2006)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Wilton Manors, FL (2006)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Miami Shores Village, FL (2005)

"Evaluation and Appraisal Report" of the Comprehensive Plan. North Miami Beach, FL (2005)

**"**Southwest Ranches Comprehensive Plan "Review and commentary on proposed provisions. Town of Southwest Ranches, FL (2002)

**"**Federal Highway Corridor Community Redevelopment Plan," Boynton Beach, FL (2001)

"Regional Activity Center", Town of Davie, FL (2016)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Land Use, Conservation, Recreation and Open Space, Intergovernmental Coordination Elements. Davie, FL (1994)

**HOUSING-RELATED STUDIES**

Housing Study, City of Sugar Hill, Georgia (2015)

Community Visioning and Comprehensive Housing Study, City of North Miami, FL (2006)

Dania Beach Housing Authority HUD Grant, City of Dania Beach, FL (2015-2016)

Community Redevelopment Plan, City of Dania Beach, FL (2008)

Development Plan within the Regional Activity Center, Town of Davie, FL (2007-2008)

Housing Study within the Regional Activity Center, Town of Davie, FL (2007-2008)

Community Redevelopment Plan, City of Boynton Beach, FL (2001-2002)

Comprehensive Plan and Housing Element, City of Wilton Manors, FL (2013)

Analysis of Affordable Housing, Town of Southwest Ranches, FL (2003)

**CONSENSUS BUILDING**

City of Wilton Manors, FL (2003)

City of Oakland Park (2008)

City of Dania Beach, FL (2009)

City of Deerfield Beach, FL (2015)

City of Sugar Hill, GA (2015)

City of North Miami, FL (2015)

City of Hallandale Beach, FL (2016)

**OTHER AUTHORED DOCUMENTS AND MONOGRAPHS**

Economic Impact of Runway Expansion on Residential Values and Ad Valorem Revenues as part of the Westside Master Plan (2009).

"Lauderdale Lakes Affordable Housing Analysis," (2008).

"Analysis of the M-1 Zoning District for the City of Boynton Beach," (2006).

"An Analysis of the Affordable Housing Issue in Southwest Ranches, Florida," (2005).

"Analysis of Affordable Housing in Three Broward County, Florida Communities," (2005).

"Analysis of the Impact of General Commercial Uses and of Fuel Sales Facility Uses on the Assessed Value of Single Family Residential Uses," (2003).

"Analysis of the Economic Impact of Exempting Regional Activity Centers from Traffic Concurrency," (2001).

"Analysis of the Economic Impact on Fort Lauderdale of Vessels in Excess of Eighty Feet in Height, " (1994).

"The Economic Impact of Environmental Protection Regulations on the Budget of Municipal Government," (1993).

"Branch Office Expansion Plan," (1987). Short and long range development plan utilized multiple regression analysis with place of employment and place of residence as variables to determine future office locations.

**PROFESSIONAL EXPERIENCE**

Michele Mellgren, AICP, has more than thirty years of public and private sector experience in urban planning, zoning and land use, including providing expert witness testimony, where she has qualified in circuit court as a planning expert. She is the principal-in-charge of The Mellgren Planning Group, Inc., which was established in 1998 to provide professional planning, zoning, land use and expert witness consulting services to the public and private sectors.

Ms. Mellgren has current extensive experience in all phases of planning, zoning and land use matters, providing services to a number of local governments and private clients. Her current experience routinely includes undertaking land use plan amendments; rezonings; variances; redevelopment plan preparation; development research; economic impact analyses; zoning code and land development code preparation, interpretation and application; and, providing expert witness testimony. She has provided expert witness testimony in more than 500 public hearings and has also qualified as an expert witness in Circuit Court. She also serves as the planning and zoning official for the City of Parkland, Florida, and serves as the planning official for the Town of Southwest Ranches.

Until the establishment of the firm, Ms. Mellgren worked from 1994 to 1998 for the Town of Davie, where she was the Director of Development Services. In that capacity, she was responsible for preparing and administering the comprehensive plan, the zoning code and land development regulations. She also reviewed and made recommendations for all related applications, many of them in a quasi-judicial setting as an expert witness for the Town. These applications included site development plans, land use plan amendments, rezonings, variances, special permits, plats and delegation requests. Ms. Mellgren also directed the operations of code compliance, building permits, occupational licensing and community redevelopment, overseeing an annual budget of approximately $3.5 million.

Prior to joining the Town of Davie, Ms. Mellgren worked from 1989 to 1994 for the City of Fort Lauderdale as Development Programs Manager. In this capacity, she undertook a variety of unique and complex planning projects and programs. Ms. Mellgren was responsible for implementing segments of the beach redevelopment plan; advocating for the marine industry and marine development community; streamlining the housing redevelopment program; and, preparing economic analyses.

Before she joined the public sector in Florida, Ms. Mellgren served in the private sector in the Washington, D.C. area from 1985 until 1989. During this time, she worked for Dewberry & Davis, a large planning and engineering consulting firm, to provide comprehensive consulting services to the development community. Subsequently, she worked for Winchester Land, a land development and home building subsidiary of the Weyerhaeuser Company. While working for Dewberry & Davis, she assisted in processing numerous rezonings and land use application projects. She also prepared a comprehensive short and long-range expansion plan for the area's leading financial institution. As Development Manager for Winchester Land, Ms. Mellgren was responsible for identifying and resolving issues to allow for land development projects.

**JEFFREY N. KATIMS, AICP, CNU-A**

**PROFESSIONAL QUALIFICATIONS**

## EDUCATION

Master's Degree: Urban and Regional Planning
Florida State University, Tallahassee, FL

Bachelor of Arts Degree: Psychology
State University of New York, College at Oneonta, Oneonta, NY

Virginia Polytechnic Institute
Academy for the New Urbanism, Form-Based Codes Institute

University of Miami, School of Architecture
Principles and Practices of New Urbanism, CNU Accreditation

Office of the Attorney General
Florida Crime Prevention Training Institute

## PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS

**American Institute of Certified Planners (AICP)**
Membership Number 012252 – Effective 1996
This is the highest level of earned professional planning certification

**American Planning Association (APA) – National Chapter**
Membership Number 076051 - Effective 1990

**Florida American Planning Association (FAPA)**
Membership effective 1990

**Broward County Section of American Planning Association (BAPA)**
Membership effective 1993

**Congress for the New Urbanism-Accredited**
Membership effective 2009

## PROFESSIONAL AFFILIATIONS

Urban Land Institute (1999-2001)
Florida League of Cities, Broward County Technical Advisory Committee Secretary (1997-1998)

## AWARDS OR RECOGNITIONS

City of Hallandale, FL – Employee of the Year Award, 1995

## AUTHORED ZONING CODES AND LAND DEVELOPMENT REGULATIONS

City of Parkland, Broward County, FL
*Rewrite entire zoning code, including sign code (2015)*

City of Wilton Manors, Broward County, FL
*Prepare form based code for Transit Oriented Corridor (2012)*

City of Coconut Creek, Broward County, FL
*Prepare sign code (2011)*

City of Dania Beach, Broward County, FL
*Prepare unified land development regulations (2010)*

City of Miami Gardens, Miami Dade County, FL
*Update land development regulations (2010)*

City of Dania Beach, Broward County, FL
*Prepare form based code (2009)*

City of Plant City, Hillsborough County, FL
*Prepare form based code (2009)*

Town of Davie, Broward County, FL
*Prepare form based code(2008)*

City of Pinellas Park, Pinellas County, FL
*Prepare zoning regulations (2005)*

Town of Southwest Ranches, Broward County, FL
*Prepared unified zoning and land development regulations (2004)*

Town of Lauderdale-By-The-Sea. Broward County, FL
*Prepare unified zoning and land development regulations (2003)*

City of Wilton Manors, Broward County, FL
*Prepared unified zoning and land development regulations (2003)*

City of Boynton Beach, Palm Beach County, FL
*Prepared new zoning districts to implement redevelopment plan (2001)*

Town of Davie, Broward County, FL
*Prepared the Griffin Corridor District and other new zoning standards and land development regulations (1996-2001)*

**AUTHORED REDEVELOPMENT PLANS AND COMPREHENSIVE PLANS**

"Evaluation and Appraisal Report" of the Comprehensive Plan. Miami Shores Village, FL (2005)

"Evaluation and Appraisal Report" of the Comprehensive Plan. North Miami Beach, FL (2005)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Sunrise, FL (2005)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Parkland, FL (2005)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Tamarac, FL (2005)

**"**Southwest Ranches Comprehensive Plan." Review and commentary on proposed provisions. Town of Southwest Ranches, FL (2002)

"Town of Davie Comprehensive Plan Evaluation and Appraisal Report Amendments." Davie, FL (1997)

"City of Hallandale Beach Comprehensive Plan Evaluation and Appraisal Report."(Future Land Use Element and Coastal Element). Hallandale Beach, FL (1996)

"County Line Road Corridor Plan." Hallandale, Florida (1995)

"Fashion Row District Plan." Hallandale, Florida (1993)

**OTHER AUTHORED DOCUMENTS AND MONOGRAPHS**

"Potable Water Level of Service Standards", (Minch, Katims) *Florida Planning* (2009)

"Concurrency Management System for North Miami Beach (2004)

"Justification for the Davie Regional Activity Center." (1997)

"Albany-Dougherty County Paratransit Plan." (1992)

**PROFESSIONAL EXPERIENCE**

Jeff Katims, AICP, CNU-A has more than 22 years of public and private sector experience in urban planning, zoning and land use, including providing expert witness testimony. He is the Managing Principal of The Mellgren Planning Group, Inc., which provides professional planning, zoning, land use and expert witness consulting services to the public and private sectors.

Mr. Katims has current extensive experience in all phases of planning, zoning and land use matters, providing services to a number of local governments and private clients on behalf of the firm. His current experience routinely includes undertaking land use plan amendments; rezonings; variances; development research; zoning code and land development code preparation, interpretation and application; and, providing expert witness testimony. Mr. Katims has qualified as an expert witness in State of Florida Administrative Hearings. He also serves as the assistant planning and zoning official for the Town of Southwest Ranches, Florida, including serving as the Town's expert witness in quasi-judicial land use matters, as necessary.

Until joining The Mellgren Planning Group, Mr. Katims worked from 1996 to 2001 for the Town of Davie, where he was ultimately the Planning and Zoning Manager. In that capacity, he was responsible for preparing and administering the comprehensive plan, the zoning code and land development regulations. He also reviewed and made recommendations for numerous land use related applications, many of them in a quasi-judicial setting as an expert witness for the Town. These applications included site development plans, land use plan amendments, rezonings, variances, special permits, plats and delegation requests.

Prior to joining the Town of Davie, Mr. Katims worked from 1993 to 1996 for the City of Hallandale Beach as Associate Planner. In this capacity, he undertook a variety of planning projects. Mr. Katims was responsible for analyzing development requests; writing and implementing segments of the comprehensive plan; amending and administering the zoning code; and, preparing redevelopment plans and assisting in their implementation.

Before relocating to Florida, Mr. Katims provided professional planning services to the Albany Dougherty Planning Commission in Albany, Georgia from 1991 to 1993. For this City/County Planning Commission, he administered multiple city and county zoning and subdivision regulations; analyzed land development applications; and, prepared and implemented the County's first ADA Paratransit Plan.

**ALTHEA P. JEFFERSON, AICP**

**PROFESSIONAL QUALIFICATIONS**

**EDUCATION**

Master's Degree: Urban and Regional Planning
Florida State University, Tallahassee, FL

Bachelor of Science Degree: Political Science
Florida A&M University, Tallahassee, FL

**PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS**

**American Institute of Certified Planners (AICP)**
Membership Number 022219 – Effective 1998
This is the highest level of earned professional planning certification

**American Planning Association (APA) – National Chapter**
Membership Number 116673 - Effective 1993

**Broward County Section of American Planning Association (BAPA)**
Membership effective 2013

**PROFESSIONAL AFFILIATIONS**

Leadership Orlando, 1998
Leadership Orlando Alumni Board, 2004

**AWARDS OR RECOGNITIONS**

Central Florida YMCA Black Achievers, Adult achiever, Class of 2000-2001

**GENERAL MUNICIPAL PLANNING SERVICES**

City of St. Petersburg, Pinellas County, FL (1993-1994)

Orange County, FL (1994-2012)

City of Hallandale Beach, Broward County, FL (2012- 2017)

City of Parkland, Broward County, FL (2017 - Present)

**DEVELOPMENT REVIEW SERVICES**

City of Parkland, Broward County, FL (2017 – Present)

City of Hallandale Beach, Broward County, FL (2013 – Present)

**AUTHORED ZONING CODES AND LAND DEVELOPMENT REGULATIONS**

City of Hallandale Beach, Broward County, FL
*Prepare amendments to land development regulations*
*Prepare form based code for Regional Activity Center (2014, 2016)*

**AUTHORED REDEVELOPMENT PLANS AND COMPREHENSIVE PLANS**

"Wekiva Study Area Land Use Plan Amendments." Orange County, FL (2007)

"Evaluation and Appraisal Report" of the Comprehensive Plan. Orange County, FL (2008)

"Town of Davie Comprehensive Plan Evaluation and Appraisal Report Amendments." Davie, FL (1997)

"City of Hallandale Beach Comprehensive Plan Evaluation and Appraisal Report" Hallandale Beach, FL (2017)

**ORGANIZED PLANNING BEST PRACTICE EDUCATIONAL EVENTS**

Orange County Neighborhood Conference, Orange County, FL (1996)

Planning Matters, Orange County, FL (1997)

Orange County Redevelopment Conference, Orange County, FL (2008, 2012)

**CONSENSUS BUILDING**

City of St. Petersburg, FL (1993-1994)

Orange County, FL (1995, 1996, 2007)

City of Hallandale Beach, FL (2013, 2014, 2016, 2017)

City of Hallandale Beach, FL (2016)

**OTHER AUTHORED DOCUMENTS AND MONOGRAPHS**

"Ninth Avenue Corridor Study," City of St. Petersburg, FL (1994)

"Winter Garden Community action Plan" (1995) Orange County, FL Targeted Community Initiative*

"Orange County Infill Master Plan" 2008

* The Targeted Community Initiative was awarded the 1997 Public Service Excellence Award by President Clinton

**PROFESSIONAL EXPERIENCE**

Althea Jefferson, AICP, has over 20 years of public sector experience in urban planning, zoning and land use, intergovernmental coordination and public engagement. She is Senior Associate with The Mellgren Planning Group, Inc., which provides professional planning, zoning, land use and expert witness consulting services to the public and private sectors.

Ms. Jefferson has experience in all phases of planning, zoning and land use matters. Her current experience routinely includes undertaking land use plan amendments; rezonings; variances; development research; zoning code and land development code preparation, interpretation and applications.

Until joining The Mellgren Planning Group, Ms. Jefferson worked from 2012 to 2017 for the City of Hallandale Beach as the Planning and Zoning Manager. In that capacity, she was responsible for implementing and updating the comprehensive plan, the zoning and land development code regulations, and administrative policies. She also provided staff oversight and made recommendations for numerous development applications. These applications included site development plans, land use plan amendments, rezonings, variances, special permits, plats and delegation requests.

Prior to joining the City of Hallandale Beach, Ms. Jefferson worked from 1994 to 2012 for Orange County, Florida. During this eighteen (18) year time span, she served in various positions and took on a variety of planning, outreach, economic development, redevelopment, and community engagement projects.

Early in her career, Ms. Jefferson worked as a planner with the City of St. Petersburg where she provided neighborhood planning, zoning services, and corridor analyses.

**Rebekah G. Brightbill-Dasari, CNU-A**

**PROFESSIONAL QUALIFICATIONS**

## EDUCATION & TRAINING

Master's Degree: Urban and Regional Planning
University of South Florida, Tampa, FL

Bachelor of Arts Degree: Community Development (Concentration | U.S. Urban Economic Development)
Covenant College, Lookout Mountain, GA

National Charrette Institute, NCI Charrette System Training
Upcoming (March 2017)

Florida Redevelopment Association Redevelopment Academy
"Redevelopment 101," "Budgeting, Finance, and Reporting," and "Redevelopment Incentives"

## PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS

Congress for the New Urbanism CNU Accreditation

American Planning Association (APA) – National Chapter

Florida American Planning Association (FAPA)

Broward County Section of American Planning Association (BAPA)

Former City of Bradenton Affordable Housing Advisory Committee Member

## AWARDS OR RECOGNITIONS

Florida Redevelopment Association Conference (2013)
*Presented as part of panel on "Working with Non-Profits on the CRA Missions"*

Florida Academy of Science (FAS) Annual Conference (2010)
*Received Award for "Outstanding Graduate Student Paper" in the Urban and Regional Planning Division for Research "Suburbanization Urban Decline and Government Policy in Manatee County"*

## GENERAL MUNICIPAL PLANNING SERVICES

City of Parkland, Broward County, FL (2015-current)

Town of Southwest Ranches, Broward County, FL (2015-current)

## DEVELOPMENT REVIEW SERVICES

City of Parkland, Broward County, FL (2015-current)

City of Lauderdale Lakes, Broward County, FL (2015-current)

Town of Southwest Ranches, Broward County, FL (2015-current)

## REDEVELOPMENT PLANS AND COMPREHENSIVE PLANS

"Regional Activity Center", City of Hallandale Beach, FL (2016)

"Comprehensive Plan", City of Parkland, FL (2015-2016)

"Water Supply Plan", City of Parkland, FL (2015-2016)

"EAR Based Amendments" and Comprehensive Plan Update, City of North Miami, FL (2015-2016)

"EAR Based Amendments", City of Delray Beach (2017)

"EAR Based Amendments", City of Hallandale Beach (2017)

"Water Supply Plan," Town of Southwest Ranches (2016-2017)

**HOUSING-RELATED STUDIES**

Housing Study, City of Sugar Hill, Georgia (2015)

Dania Beach Housing Authority HUD Grant, City of Dania Beach, FL (2016)

**CULTURAL DISTRICTS**

City of Bradenton Central Community Redevelopment Agency (CCRA), Bradenton, FL (2006-2014). At the CCRA, Ms. Dasari worked with community residents to commemorate under-recognized historical sites of significance to the local African American community. One project commemorated the Lyles Bryant Colored School, which served African American children in the community prior to desegregation. A second project commemorated the location of the historic 13th Avenue Community Center, which received funding from the Eisenhower Administration through Eleanor Roosevelt's relationship with Mary McLeod Bethune (who knew influential community residents). This project also developed a committee of residents to choose a significant piece of public art to accompany the Florida State historical site marker.

**RECENT RESEARCH**

University of South Florida
Thesis | "Bradenton, FL: A Patchwork City."
*The study looked at the impact of federal, state, and local planning and urban policy on neighborhood development. While the study acknowledged neighborhoods based on consumer preference, it concluded that these policies resulted in inequality of place and race, clustering racial minorities in center city neighborhoods with deteriorated infrastructure and income inequality. The City's economically and racially segregated neighborhoods are not the inevitable outcome of market forces, but rather reflect decades of federal, state, and local policy decisions. This, in turn, affects the ability of the City to be competitive with other cities as a metropolitan whole.*

"Minority Business Creation in Newtown: Equalizing the Reach of Green."
Sarasota, FL
*A component of a multi-part project on "greening" the low-income Newtown neighborhood of Sarasota, FL, this project looked at ways for the Newtown Community Redevelopment Agency (CRA) to assist the redevelopment area in growing income and wealth through the green construction industries. This was an appropriate recommendation in the context of current trends in the green building and construction, given the small-scale construction microenterprise development possibilities that exist in the Newtown neighborhood. Newtown had a history of creative entrepreneurial thinking. The growth and development of a sustainable economy in Newtown was identified in the master plan goals of the Newtown CRA, and the CRA had done a great deal of work to establish entrepreneurial development programming. With the growth of green jobs and green industry nationally and locally, an absence of training in green industry would exclude the residents of Newtown*

*from these high growth industries that demonstrated great potential for both employment and business growth.*

**PROFESSIONAL EXPERIENCE**

Rebekah Dasari has 10 years of public sector experience in redevelopment planning, community development, and economic development management. Ms. Dasari has extensive involvement with redevelopment project management and economic development program design. She is particularly interested in asset mapping, community engagement, participatory planning, research design and implementation, and economic development strategies.

At the Mellgren Planning Group, Ms. Dasari is involved in site plan review, municipal general planning, comprehensive planning, build-out analysis, GIS mapping and analysis, and economic development program development.

Prior to joining The Mellgren Planning Group, Ms. Dasari was the CRA Manager for, a 598 acre CRA with approximately 4,600 residents. She was responsible for capital projects due-diligence, coordination, and management (including a 25 acre, $6 million urban park revitalization project; a 16,000 square foot urban grocery store with 9,000 square feet of retail outparcels; and predevelopment work on an enterprise center campus designed to collocate the agency's small business development and workforce training providers, along with the non-profit supportive services, to simplify delivery to the client population for the holistic delivery of economic development services). She managed CRA finances and compliance. She was also involved in economic development programming design, outreach, and coordination (including work on the creation of a non-profit dedicated to low-income microbusiness development); a multi-year free income tax preparation program through the IRS VITA Program; and a multi-year, public-private workforce funders initiative. She also worked on several public art and community history preservation projects, which she then proposed be expanded into a history corridor. Ms. Dasari has experience in public and private, local, state, and federal grant applications, management, and compliance, including CDBG project grant applications and reporting.

**Kaitlyn Forbes, CNU-A**

PROFESSIONAL QUALIFICATIONS

## EDUCATION

Master's Degree: Urban Design
Ball State University, Indianapolis, Indiana

Bachelor of Urban Planning and Development
Ball State University, Muncie, Indiana

Congress for the New Urbanism - Accredited

## PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS

**American Planning Association (APA) – National Chapter**
Membership effective 2015

**Florida American Planning Association (FAPA)**
Membership effective 2015

**Broward County Section of American Planning Association (BAPA)**
**Urban Design and Preservation Division**
Membership effective 2015

## AWARDS OR RECOGNITIONS

American Planning Association: Indiana Chapter (2012)
*Honorable Mention for Student Project: Transit-Oriented Development Proposal, Meridian-Kessler Neighborhood, Indianapolis, IN.*

## SKILLS

Graphics: *Adobe Creative Suite*

3-D Modeling and Animation: *Lumion 3-D, Trimble Sketch-Up, Adobe Premiere*

Mapping: *ESRI GIS*

Data Collection and Analysis: *ESRI Community Analyst, ESRI Business Analyst*

## GENERAL MUNICIPAL PLANNING SERVICES CONTRACT

City of Parkland, Broward County, FL (2015-current)
*Serve as full-time planning and zoning staff.*

Village of Estero (2016-current)
*Serve as extension of staff, under direction of Village Attorney. Assisted in establishing Land Development Code standards for a new Future Land Use category. Assisted with development review and preparation of expert witness testimony.*

City of Hallandale Beach, Broward County, FL (2015-current)
*Serve as extension of staff. Ongoing projects include expanding the Regional Activity Center (allowable units), conducting development review, and facilitating public participation workshops.*

Town of Southwest Ranches, Broward County, FL (2015-current)
*Serve as planning and zoning staff. Conduct development review and planning research. Prepare zoning determination letters.*

Town of Davie, Broward County, FL (2015-current)
*Serve as extension of staff. Process Town-initiated right-of-way vacation.*

Town of Orchid, Indian River County, FL (2015-2016)
*Served as full-time planning staff for Town. Conducted development review and assisted with preparation of all associated material. Assisted with preparation of expert witness testimony.*

**DEVELOPMENT REVIEW SERVICES**

City of Delray Beach, Palm Beach County, FL (2017-current)
*Planning and zoning reviewer. Coordinates review with City Staff and prepares Staff Reports.*

City of Boca Raton, Palm Beach County, FL (2016-current)
*Primary urban design reviewer for the City. Reviews all projects submitted within the downtown area. Meets with applicants to discuss alternatives and provides determination to Community Appearance Board.*

Village of Estero, Lee County, FL (2016-current)
*Planning and zoning reviewer for Village under direction of Village Attorney. Reviews site plans and prepares Staff Reports and associated Planning Board presentations.*

City of Parkland, Broward County, FL (2015-current)
*Planning and zoning reviewer. Reviews site plans and all associated applications including Community Appearance Board review. Prepares Development Review Committee reports and Staff Reports.*

City of Hallandale Beach, Broward County, FL (2015-current)
*Planning and zoning reviewer. Reviewed site plan and landscape plan for 1M SF + development including, 4 site plans, and applications for rezoning, major development, and variances.*

City of Miramar, Broward County, FL (2015-current)
*Primary planning and zoning reviewer for City. Reviews site plans, variance applications, conditional use applications and community appearance standards. Responsible for Development Review Committee reports.*

Town of Southwest Ranches, Broward County, FL (2015-current)
*Planning and zoning reviewer. Reviews site plans and all associated applications. Prepares mail notices and associated maps.*

Town of Orchid, Indian River County, FL (2015-2016)
*Primary planning and zoning reviewer. Reviewed site plan and variance applications. Responsible for preparing Staff Report and Planning Board presentations.*

**ZONING CODES AND LAND DEVELOPMENT REGULATIONS**

Village of Estero, Lee County, FL
*Assisted with preparing land development regulations for a newly established Future Land Use category. (2015)*

City of Dania Beach, Broward County, FL
*Partnered with Community Redevelopment Agency and Planning Department staff to apply qualitative review components to development review process and foster redevelopment. (2015)*

**EXPERT WITNESS TESTIMONY**

Ms. Forbes has helped to prepare expert witness testimony in partnership with:

Lewis, Stroud, Deutsch. PL
*City of West Palm Beach, FL (2016)*

Lewis, Stroud, Deutsch. PL
*Village of Estero, FL (2016)*

Lewis, Stroud, Deutsch. PL
*Town of Orchid, FL (2015)*

Arnstein & Lehr, LLP
*Fort Lauderdale, FL (2016)*

**REDEVELOPMENT PLANS AND COMPREHENSIVE PLANS**

"Regional Activity Center", City of Hallandale Beach, FL (2015-2016)
*Assisted in study to analyze market demands and make recommendations to the Broward County Planning Council. Goal to increase number of buildable units within the existing RAC to foster development. Assisted with public outreach, messaging, and social media.*

"Comprehensive Plan", City of Parkland, FL (2015-2016)

"Evaluation and Appraisal Report", City of North Miami, FL (2015-2016)

**HOUSING-RELATED STUDIES**

Housing Study, City of Sugar Hill, Georgia (2015)
*Assisted with existing conditions inventory and analysis. Created charrette material including preference surveys to develop consensus for future housing developments.*

South Central Neighborhood Action Plan, City of Muncie, Indiana (2012)
*Partnered with South Central Neighborhood Association and CDC. Plan developed to analyze existing conditions and drive future investments and prioritization.*

**CONSENSUS BUILDING AND CHARRETTE FACILITATION**

City of Hallandale Beach, FL (2016)

City of Sugar Hill, GA (2015)

City of Detroit, MI (2014)

City of Scottsburg, IN (2013)

South Central Neighborhood, City of Muncie, IN (2012)

**URBAN DESIGN PROJECTS**

Transit-Oriented Corridor Redevelopment Study
*City of Wilton Manors (2016)*
*Modeling study to examine redevelopment opportunities resulting from a land use plan amendment. Study considered parcel aggregation options and land development regulation standards to ensure feasibility. Final deliverable included a Lumion model and 2D renderings.*

Urban Density Study
*City of North Miami, FL (2015)*
*3-D modeling study to examine the impacts of changing corridor development regulations. Study was conducted in conjunction with updating the Future Land Use Map.*

Great Places 2020
*LISC, City of Indianapolis, IN (2015)*
*Visionary community development project to transform places in Marion County neighborhoods into dynamic centers of culture, commerce, and community.*

Mass Ave - Brookside Industrial Corridor Study
*Riley Area Development Corporation, City of Indianapolis, IN (2015)*
*Planning study conducted to inventory and analyze existing conditions and recommend development strategies for a defunct industrial corridor seeking revitalization.*

**PROFESSIONAL EXPERIENCE**

Kaitlyn Forbes, CNU-A has 3 years of private sector experience in urban design, urban planning, zoning and land use. She has also assisted in preparing expert witness testimony. She is the Urban Designer for The Mellgren Planning Group Inc., which provides professional planning, zoning, land use, and expert witness consulting services to the public and private sectors.

Ms. Forbes has experience in current and long-range planning, design, and land use matters, providing services to a number of local governments and private clients on behalf of the firm. Her current experience routinely includes undertaking development review and research, land use plan amendments, comprehensive planning, and processing development applications on behalf of private clients. She also assists in preparing expert witness testimony.

Prior to joining the Mellgren Planning Group, Ms. Forbes worked for Anderson and Bohlander, an urban design and landscape architecture firm in Indianapolis, Indiana. In that capacity, she worked as an intern during graduate school and assisted with developing two of the Great Places 2020 studies. Local Initiatives Support Corporation (LISC) of Indianapolis launched Great Places 2020 with the goal of transforming three strategic places in Marion County into neighborhood centers exuding livability, opportunity, vitality, and education (LOVE). Great Places are intended to be dynamic centers of culture, commerce, and community. Ms. Forbes's role included field research, inventory and analysis, and graphic development. Throughout the process, she worked with real estate developers and marketing specialists to create a final graphic publication addressing the neighborhood's existing conditions, strengths, weaknesses, and opportunities.

While at Anderson and Bohlander, Ms. Forbes also worked on the Mass Ave. Industrial Corridor Study. After decades of neglect and vacancy, the Mass Ave/Brookside Industrial Corridor aspired to be a leading example of rebranding a legacy industrial district into a desirable urban center of making and manufacturing. Ms. Forbes was involved in the primary corridor study that focused on both economic development and quality of life for workers and residents, with an emphasis on connectivity, collaboration, and a balance of character and function. She helped develop the final publication and generated a series of inventory and analysis maps.

Before she joined the private sector, Ms. Forbes served as an intern in with the New York State Office of Climate Change. Here she aided in the successful launch of the Climate Smart Communities (CSC) certification program, which is an interagency effort with the goals of reducing greenhouse emissions, preparing for the impact of climate change, and saving taxpayer money. Since the launch, over 187 communities have been certified as bronze, silver, or gold CSC municipalities. Ms. Forbes also reviewed Regional Sustainability Plans and drafted municipal guidance documents, regulations, and strategic messaging methods.

**Timothy O. Haynes**

PROFESSIONAL QUALIFICATIONS

## EDUCATION

Bachelor of Urban Design and Regional Planning
Minor in Public Management
Concentration: Planning and Design
Florida Atlantic University, Boca Raton, FL
Graduation: December 2016
*Academic Deans List*

## PROFESSIONAL MEMBERSHIPS OR DESIGNATIONS

Crime Prevention Through Environmental Design (CEPTED)
Membership Effective 2015

Broward County Section of American Planning Association (BAPA)
Membership effective 2016

## AFFILIATIONS

Broward County Section of American Planning Association Board Member (2016)

National Society of Leadership and Success, Planning Society

## ZONING CODES AND LAND DEVELOPMENT REGULATIONS

Delray Beach, Palm Beach County, FL (2015)
*Formulated Special Activity District (SAD) updated Zoning District Map and inclusionary Zoning Regulations in Land Development Regulations*

## REDEVELOPMENT PLANS

City of Hallandale Beach, Broward County, FL (2016-present)
*Assisted with development of public outreach workshop series. Developed mitigation strategies based on citizen-identified development concerns.*

## CONSENSUS BUILDING AND PUBLIC WORKSHOPS

City of Hallandale Beach, Broward County, FL (2016)

## PROFESSIONAL EXPERIENCE

Timothy Haynes has nearly 2 years of professional planning experience. As a current Urban Design and Regional Planning Student at Florida Atlantic University, Mr. Haynes has had substantial experience providing planning reports including data research analysis, population and employment projections, traffic reports and mitigation strategies, pedestrian and urban design inclusionary principles, and implementation strategies. Minoring in Public Management has also assisted with leadership skills and fortified work ethics concerning public sector administrative duties. Mr. Haynes' educational experience in the School of Urban and Regional Planning program at Florida Atlantic University has been a catalyst in providing planning, transportation, economic and environmental development services as a student and professional. Continuing his educational aspirations as a professional planner, he will commence in the Master's Program provided at Florida Atlantic University in Urban Planning.

Mr. Haynes has experience in both the private and public sectors of planning. His experience consists of planning and zoning, notifying issues and providing complex solutions through data analysis. Specifically, Mr. Haynes' experience includes development application and site plan review, answering zoning inquires pursuant to municipal code, and providing professional and technical feedback to clientele for various development projects. His current duties involve

working with various municipalities to provide analytical solutions and mitigation strategies for development and transportation issues within a given region.

Prior to joining The Mellgren Planning Group, Mr. Haynes worked as an intern with the City of Delray Beach for over one year. There, his core responsibilities included participating in client meetings to discuss the development processes, and deriving suggestions pursuant to the City's Land Development Regulations. He also managed development review and provided Development Review Committee notes.

Prior to working at the City of Delray Beach, Mr. Haynes worked as a Zoning Coordinator with SBA Communications reviewing telecommunication applications and sanctioning permissible construction standards under municipal regulation.

# Resumes | Miami Economic Associates, Inc.

THE MELLGREN PLANNING GROUP

**ANDREW DOLKART**
**President**
**Miami Economic Associates, Inc.**

Mr. Dolkart has provided real estate consulting services to developers, investors and governmental entities for over 40 years. His many consulting assignments have involved all major uses of real estate including residential, office, retail, industrial and hotel and resort development. His professional activities have been primarily focused on real estate projects in Florida, the Caribbean, Mexico, Central and South America.

Throughout his consulting career, Mr. Dolkart has performed a large number of assignments involving market and financial feasibility analysis for residential projects, including those designed to provide affordable housing. He has also performed studies for the Cities of Miami, Margate, Hallandale Beach, Ft. Lauderdale and Plantation as well as for Miami-Dade County to determine the availability of affordable housing in those jurisdictions. Mr. Dolkart prepared the affordable housing analyses submitted as part of the Application for Development Approval for more than a dozen Developments of Regional Impact.

Mr. Dolkart is considered one of the leading experts in the State of Florida with respect to the economics of community redevelopment and tax increment financing. In this regard, he assisted Miami-Dade County in formulating its policies and procedures for establishing new Community Redevelopment Districts within its jurisdiction. He also prepared the financing element for redevelopment plans approved in the Cities of Pompano Beach, Plantation and Dania among other cities.

Mr. Dolkart is a graduate of Harvard College and received an MBA from Harvard Business School. He has served as a member of the Board of Directors of Habitat for Miami of Greater Miami. He also chaired two task forces appointed by the Miami-Dade County Board of County Commissioners to address issues of relating to affordable housing. He is currently a member of the Advisory Board of University of Miami's Masters of Real Estate Development and Urbanism program.

**Education:**

1963 – 1967 Harvard College - Bachelor of Arts, Cum Laude

1967 - 1969 Harvard Business School - Masters of Business Administration

**Previous Positions:**

1991 – 1995 Kenneth Leventhal & Company - Director, Real Estate Advisory Services Florida/Caribbean

1988 – 1990 Laventhol & Horwath - Director, Real Estate Advisory Services Florida/Caribbean

1986 – 1988 GA/Partners - Vice President in Charge Florida Office

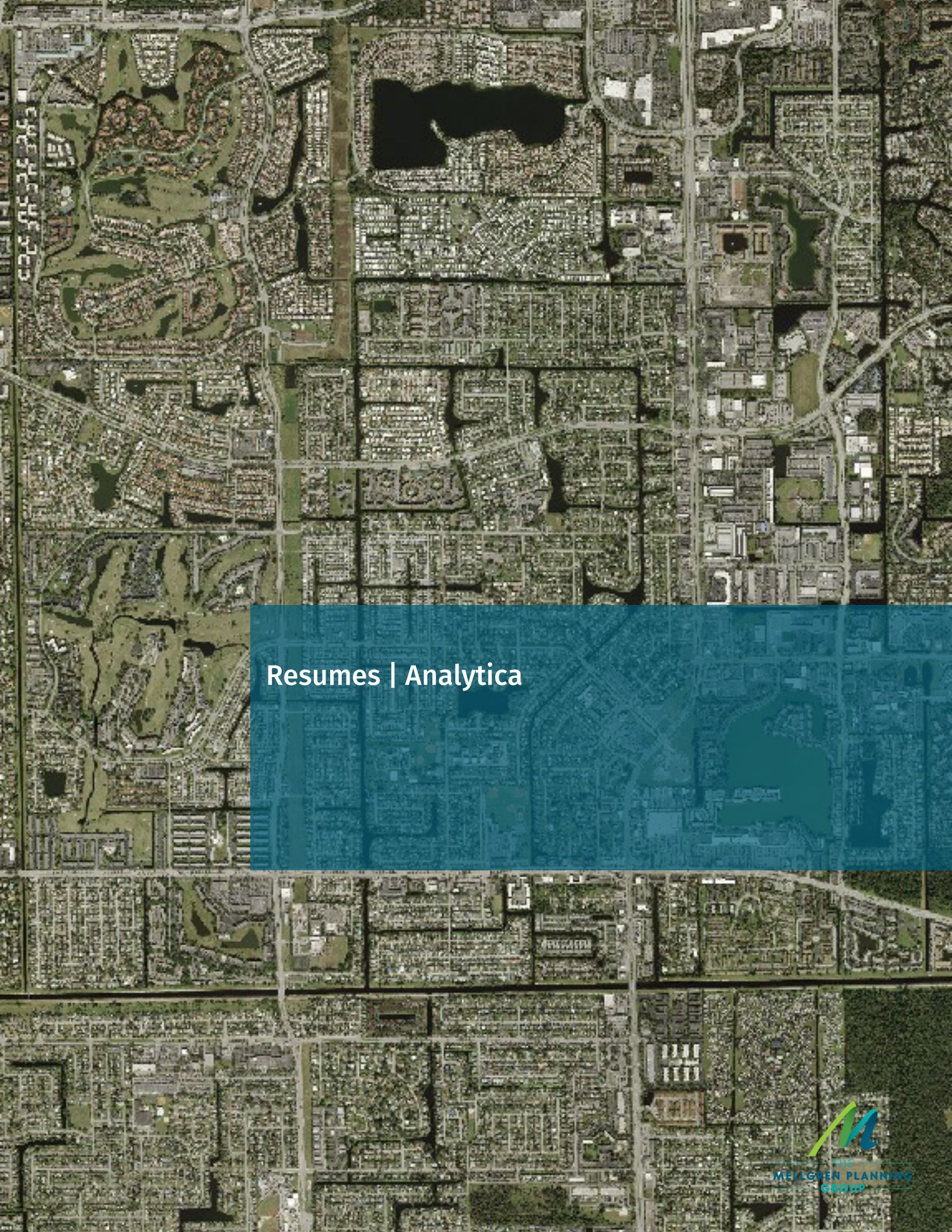
1983 – 1986 Gulfstream Land & Development Corp. - Director, Commercial Development

1980 – 1983 Laventhol & Horwath - Director, Real Estate Advisory Services Florida/Caribbean

1976 - 1980 Jandy, Inc. - Owner/President

1972 – 1976 Gladstone Associates - Senior Associate

1969 – 1972 U. S. Navy - Commissioned Officer, Office of Legislative Affairs



# Resumes | Analytica

THE MELLGREN PLANNING GROUP

Herbert A. Marlowe, Jr.

**Education**: Ph.D. University of Florida, 1984

**Professional Background**: Herb is a professional strategic planner and facilitator with extensive training and experience in a wide range of settings. While the term "strategic planning facilitator" may be used by anyone since it is an unregulated term, it is a distinctive field of study and profession. Herb began his career as a strategic planner while in the U.S. Navy when he was selected as one member of a 24 person team charged with developing a 25 year strategic plan under the direction of the Chief of Naval Operations, Admiral Elmo Zumwalt. As a member of this team he received extensive training in the fields of strategy and process consultation by some of the leading consultants in the field. Upon completing his naval service, including service in Vietnam, he entered graduate school at the University of Florida (UF).

While completing his doctoral work at UF, he did extensive coursework in various disciplines each of which enhanced his ability to provide high level strategic planning and facilitation services. This included counseling training which honed his listening and framing skills; classes in group-work technique which built his ability to assist a group in problem-solving and decision-making; anthropology courses which developed his observational and qualitative data skills, organizational theory and organizational development courses which built his skills in organizational processes and advanced statistical courses which developed his capacity to interpret data sets for decision-makers. He completed his doctoral dissertation on social intelligence (i.e. the ability to work effectively with others), which was published in one of the field's premier peer-reviewed journals.

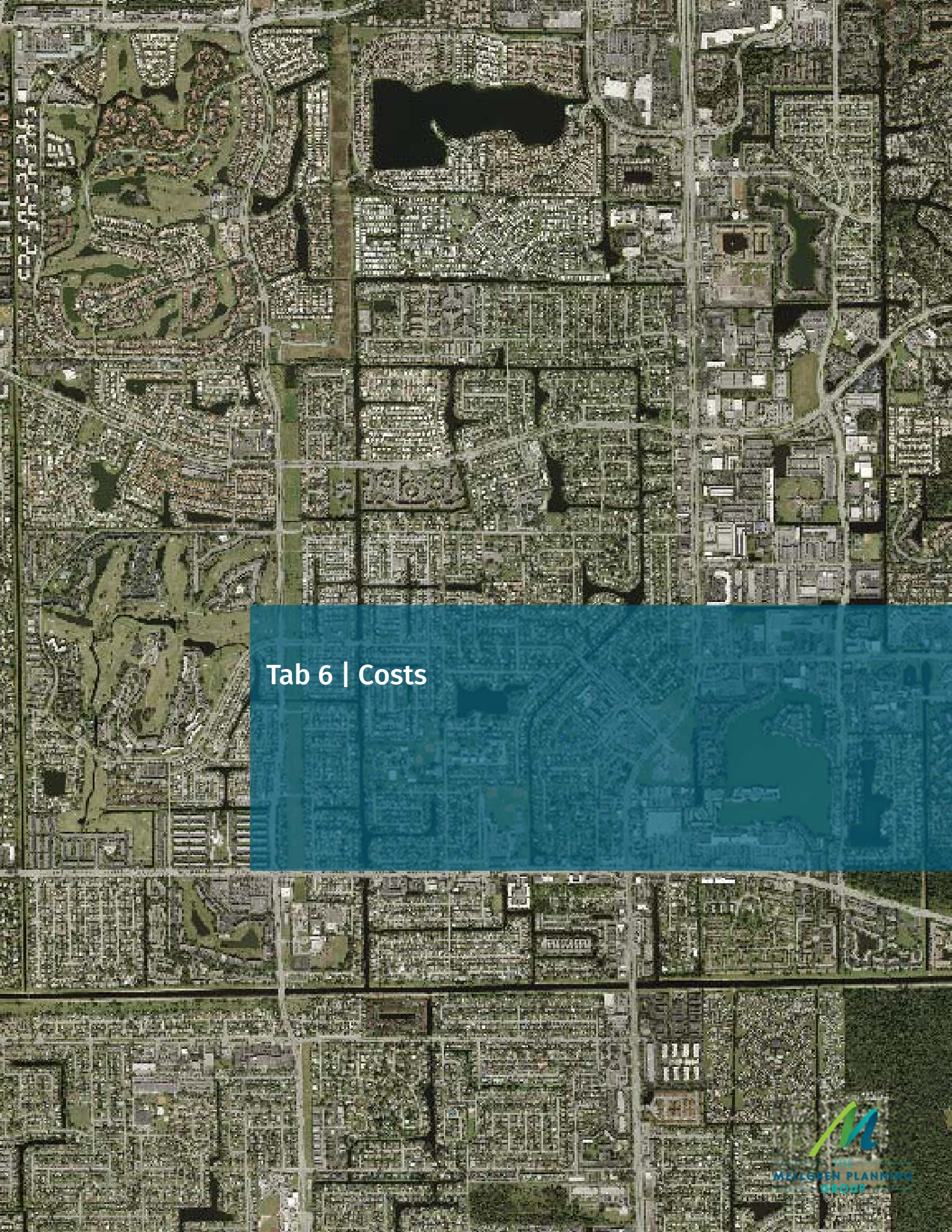
While writing his dissertation he was employed as the Florida Mental Health Institute, University of S. Florida where he led an organizational and system change project that instituted a new therapeutic model for mental health services. This project required extensive facilitation work as well as organizational development services to build support for and skill in the new approach. Upon award of his Ph.D. he took a series of positions at the University of Florida which gave him consulting privileges where he established Analytica in 1987. Having built his consulting practice to the point where a full-time commitment to consulting was feasible, he began a full-time practice in 1991. Since that time he has provided strategic planning, process facilitation and other organizational development services to a wide range and number of public and third sector clients.

Herb has continued to refine and improve his skills as a strategic planner and process consultant. He regularly publishes in peer-review and professional journals and presents at conferences. He has most recently published or presented on the topics of effective public participation, facilitating the development of public management networks and the development of integrated management systems as a tool to implement and manage strategic plans. His publications have appeared in such journals as *State and Local Government Review*, *Journal of Correctional Psychology*, *Journal of Managerial Psychology*, *Psycho-social Rehabilitation Journal*, *Journal of Educational Psychology*, *Public Manager*, *Public Productivity and Management Review*, *Evaluation Review*, *ICMA IQ reports*, and the *American*

*Water Works Association Journal*. His article on strategy and organizational change was selected as one of the thirty most significant articles of the last thirty years in public administration

Herb is highly conversant with public sector topics and perspectives. With over thirty years of consulting experience, Herb has facilitated meetings and longer term processes on a broad range of topics in a wide number of public policy fields including: agriculture, health, mental health, human services, transportation, community redevelopment, economic development, downtown redevelopment, law enforcement and criminal justice, school readiness, after-school programming, library services, recreation and culture, public utilities, tourism, race and cultural relations, and environmental issues.

In addition to his strategic planning work he has provided process consultation and organizational development services for public sector entities on topics such organizational re-structuring, succession planning, business planning, compensation and staffing studies, outcome and impact evaluation, customer satisfaction studies, stakeholder studies, and process redesign projects. In each of these areas he has applied his particular skills to assist groups to analyze the issue, develop alternatives, and prioritize an action plan to move forward toward some shared goal.



# Tab 6 | Costs

THE MEYGREN PLANNING GROUP

# Cost Narrative

## Assumptions

TMPG has written a thorough scope of work and narrative and developed the project schedule. This schedule includes key tasks target dates, timing of public meetings, and the final completion date. It is estimated that the duration of the Project will take approximately **18 months** from project commencement to completion. The schedule assumes that staff will respond to requests for information within 5 business days of receipt of the request.

## Budget Approach

Although we understand the Scope of Services has specific requirements, we have provided an approach to pricing that will allow the City to take an "à la carte" approach to selecting the services necessary to effectively accomplish the project purpose within budget.

One example of this is the updates to the elements themselves. While the Scope of Services (IV. 4 - Deliverables) requests a dynamic digital version of the ***entire*** amended Comprehensive Plan, the rest of the Scope identifies only the Future Land Use Element for updating, not the other eight (8) Elements – several of which, as noted in the RFP, are overdue for an update and could benefit from updating due to changing conditions in the City. Because future updates to these elements are planned, we recommend producing a dynamic digital version of the Future Land Use Element ***only,*** in order to prevent rework on a document expected to change substantially in the near future

Additionally, The Mellgren Planning Group is capable of performing the analysis of market and economic conditions identified in the Scope of Services; however, subconsultant Miami Economic Associates, Inc. has been added to the team to provide the City of Margate with the option to have an additional layer of analysis provided by a firm whose only specialty is in these areas.

Finally, we have provided a budget for a thorough public engagement process for the Vision Statement. We feel that the proposed approach will assist the City in accomplishing the goals identified in the RFP. However, we can provide public engagement on a smaller scale if budget is a concern.

Optional - or "à la carte" items - are shown in **blue text** in the budget on the following page.

# Costs

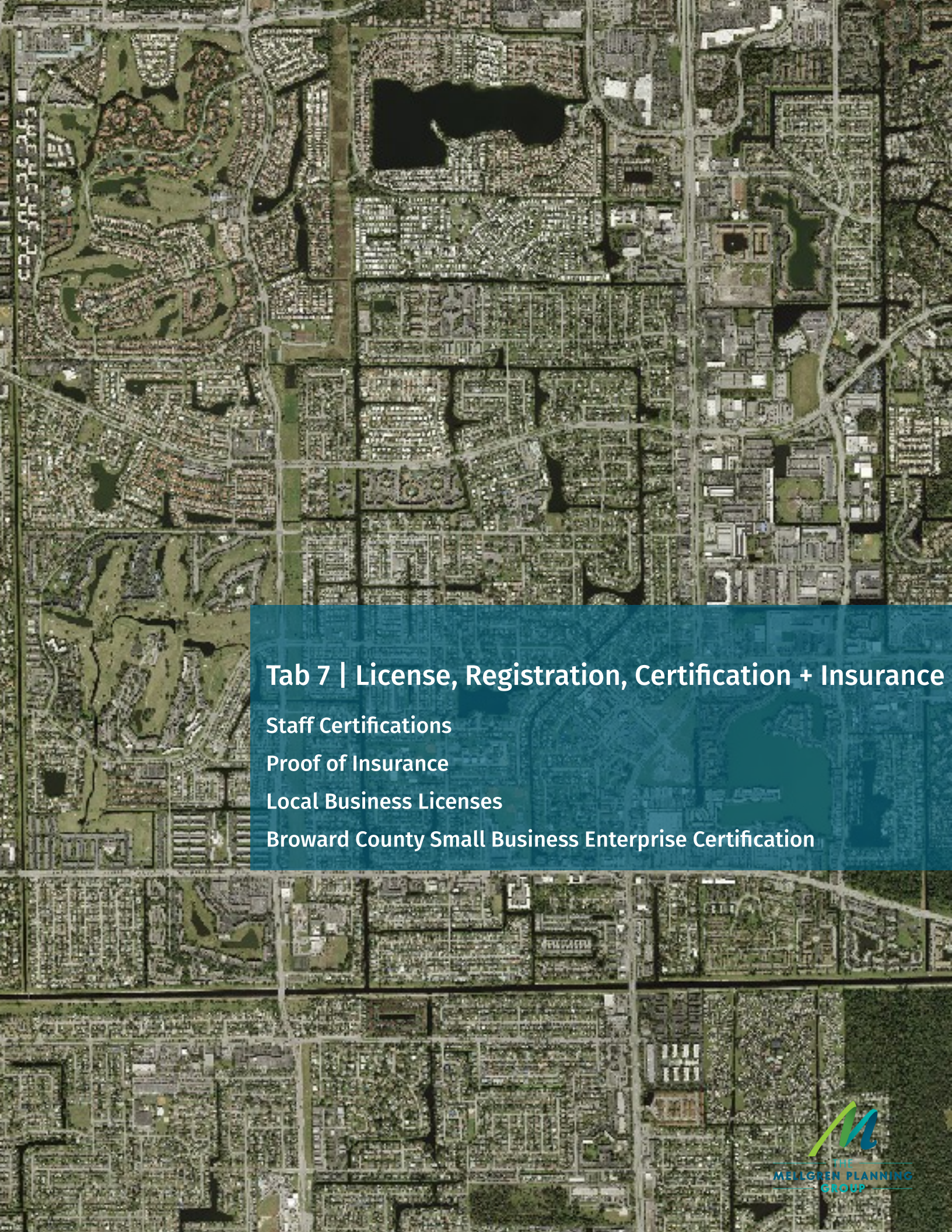
| TASKS AND DELIVERABLES | Cost (Base Price) | Cost (Add-On's) |
|---|---|---|
| **Assessment of Existing Conditions and Public Input** | | |
| Public Engagement Plan and Plan Implementation | $3,125 | * |
| Draft Future Land Use Amendment | $19,075 | * |
| Amendments to Other Plan Elements (ONLY to Eliminate Any Conflicts With the Proposed Future Land Use Element Changes) | $2,000 | * |
| Optional \| Economic and Market Analysis by Subconsultant Firm Miami Economic Associates, Inc. at 75% Municipal Rate | * | $22,500 |
| Summary of Ongoing Public Participation Program and Results | $4,700 | * |
| Schedule for Amendment Adoption Process | $1,500 | * |
| **Comprehensive Plan Amendment: Vision Statement** | | |
| Draft Vision Statement | $4,670 | * |
| Public Engagement Process | $69,900 | * |
| Optional \| Scientific Survey | * | $25,000 |
| Integration Strategy with Zoning Code and Community Redevelopment Plan | $2,000 | * |
| Narration of Future Planning and Zoning Focus | $2,000 | * |
| **Comprehensive Plan Amendment: Design Statement** | | |
| Draft Design Statement | $12,070 | * |
| Integration Strategy for Zoning Code and Community Redevelopment Plan | $2,000 | * |
| Narration of Future Design Goals and Objectives | $2,000 | * |
| **Comprehensive Plan Amendment: Future Land Use Element** | | |
| 10 Final Copies of Draft Amended Future Land Use Element | (Next Page) | * |
| Dynamic, Digital Version of the Entire Amended Comprehensive Plan | * | * |
| Future Land Use Element ONLY | $4,000 | * |
| Vision Statement | $1,500 | * |
| Design Statement | $1,500 | * |
| Optional \| ALL Other Elements | * | $13,000 |
| **TOTAL** | **$132,040** | **+ $60,500** |

# Costs

| Hourly Rates | |
|---|---|
| **Role** | **Rate** |
| Principal-in-Charge | $200/HR |
| Managing Principal | $185/HR |
| Senior Associate | $150/HR |
| Planner/Urban Designer | $100/HR |
| Office Administrative | $50/ HR |
| Economic & Market Analyst | $175/HR |
| Visioning Consultant* | $200/HR |

| Direct and Indirect Costs | |
|---|---|
| **Item** | **Cost** |
| Mileage | .535 cents per mile |
| Black and White Copies (letter, legal, and Tabloid sizes) | .10 cents per page |
| Color Copies | |
| Letter | .18 per page |
| Legal | .20 per page |
| Tabloid | .25 per page |
| Color Printed Maps (sized greater than 11x17) | |
| 17” x 22” | $4 per page |
| 24” x 36” | $6 per page |
| 30” x 42” | $8 per page |
| 36” x 48” | $10 per page |

* For a minimum 8-hour commitment, due to travel requirements.



# Tab 7 | License, Registration, Certification + Insurance

Staff Certifications

Proof of Insurance

Local Business Licenses

Broward County Small Business Enterprise Certification

THE MELLGREN PLANNING GROUP

# Professional Licenses & Forms

All TMPG team members are members of the American Planning Association (APA) as well as the Florida and Broward County divisions. A license is not required for planners in the State of Florida. However, TMPG staff have obtained certifications from industry credentialing organizations. Three (3) senior TMPG staff members are certified by the American Institute of Certified Planners (AICP), and three staff members are certified by the Congress for the New Urbanism (CNU-A). Both certifications require testing/continuing education credits and demonstrate subject-matter expertise. Three staff members are also trained by the National Charrette Institute in charrette facilitation and management—a process the firm has successfully used to achieve positive outcomes on a number of projects.

Licensure is also not required for Miami Economic Associates, Inc. or Analytica.

As requested in the RFP, the following documents are included in the following pages:

- Staff Certifications
- Proof of Insurance
- Local Business Licenses
- Broward County Small Business Enterprise Certification

# AICP

MICHELE C. MELLGREN

HAS QUALIFIED AS A

**MEMBER**

AMERICAN INSTITUTE OF CERTIFIED PLANNERS

JULY 1996

DATE OF MEMBERSHIP

PRESIDENT

EXECUTIVE DIRECTOR

NCI national charrette institute

Michele Mellgren

has completed

# NCI Charrette Management and Facilitation™ Training

*March 2009*

**Bill Lennertz** Executive Director

NATIONAL CHARRETTE INSTITUTE, PORTLAND, OREGON

NCI national charrette institute

# Michele Mellgren

has completed

# NCI Charrette System™ Training

*March 2009*

**Bill Lennertz** Executive Director

NATIONAL CHARRETTE INSTITUTE, PORTLAND, OREGON

# AICP

## JEFFREY NEIL KATIMS

HAS QUALIFIED AS A

**MEMBER**

AMERICAN INSTITUTE OF CERTIFIED PLANNERS

**JULY 1996**

DATE OF MEMBERSHIP

PRESIDENT

EXECUTIVE DIRECTOR

# CNU

The Congress for the New Urbanism
on the nomination of the faculty of the
University of Miami
School of Architecture
recognizes

## Jeff Katims

as a CNU Accredited Member

DATE

December 16, 2009

CONGRESS FOR THE NEW URBANISM

ELIZABETH PLATER-ZYBERK
*Dean*
University of Miami
School of Architecture

JOHN NORQUIST
*President and CEO*
Congress for the
New Urbanism

# Office of the Attorney General

## Division of Victim Services and Criminal Justice Programs

*Awards this certificate of recognition to*

## JEFF KATIMS

*as evidence of the successful completion of the course*

**Basic Crime Prevention Through Environmental Design**
**24 Hours**

*In withness thereof, this diploma, duly signed and with the Seal of the State of Florida affixed, has been issued by the Attorney General upon recommendation of the faculty on this 30th Day of August, 1995*

ATTORNEY GENERAL
STATE OF FLORIDA

*Robert A. Butterworth*
*Attorney General*
*State of Florida*

*The Board of Directors of the*
*Form-Based Codes Institute acknowledges that*

# Jeff Katims

*has completed the Institute's inaugural*
*course series in August 2006.*

Paul Crawford, FAICP
Chairman, Form-Based Codes Institute
Board of Directors

Peter Katz
President, Form-Based Codes Institute

Arthur C. Nelson, Ph.D., FAICP
Director, Urban Affairs and Planning
Virginia Tech, National Capital Region

FBCI Form-Based Codes Institute

Virginia Tech 1872

ACADEMY *for the* NEW URBANISM

# The American Institute of Certified Planners

The Professional Institute of the American Planning Association

hereby qualifies

## Althea Plair Jefferson

as a member
with all the benefits
of a Certified Planner and
responsibility to the
AICP Code of Ethics
and Professional Conduct.

Certified Planner Number: 022219

January 24, 2008

PRESIDENT

EXECUTIVE DIRECTOR

# CNU

The Congress for the New Urbanism
on the nomination of the faculty of the
University of Miami
School of Architecture
recognizes

## Rebekah Dasari

as a CNU Accredited Member

DATE

**March 30, 2015**

CONGRESS FOR THE NEW URBANISM

RODOLPHE EL-KHOURY, PhD
Dean and Professor of Architecture
University of Miami School of Architecture

LYNN RICHARDS
President and CEO
Congress for the New Urbanism

NCI national charrette institute

# Rebekah Dasari

has completed

# NCI Charrette System™ Training

*March 2017*

**Bill Lennertz** Executive Director

NATIONAL CHARRETTE INSTITUTE, PORTLAND, OREGON

CNUa
accredited

The Congress for the New Urbanism

*recognizes*

# Kaitlyn Forbes

**CNU-Accredited member**

---

*on the nomination of the faculty of*

University of Miami School of Architecture

*as of*

March 23, 2016

**Rudolphe EL-Khoury PhD**
Dean & Professor of Architecture,
University of Miami School of
Architecture

**Lynn Richards**
President & CEO, Congress for the New
Urbanism

NCI national**charrette**institute

# Kaitlyn Forbes

has completed

# NCI Charrette System™ Training

*March 2017*

**Bill Lennertz** Executive Director

NATIONAL CHARRETTE INSTITUTE, PORTLAND, OREGON

MELLG-1

OP ID: SP

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 06/25/2018

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

PRODUCER
Randall Iten Insurance Agency,
5905 S University Drive
Davie, FL 33328
Louis Randall Iten
954-680-0360

CONTACT NAME: Stephanie Partik
PHONE (A/C, No, Ext): 954-680-0360
FAX (A/C, No): 954-680-0876
E-MAIL ADDRESS: spartik@itenagency.com

| INSURER(S) AFFORDING COVERAGE | NAIC # |
|---|---|
| INSURER A : Depositors Insurance Company | 42587 |
| INSURER B : Allied P & C Insurance Company | 42579 |
| INSURER C : | |
| INSURER D : | |
| INSURER E : | |
| INSURER F : | |

INSURED
The Mellgren Planning Group,
Inc. and Complete Cities
Initiative, Inc.
3350 NW 53rd Street Ste 101
Fort Lauderdale, FL 33309

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | COMMERCIAL GENERAL LIABILITY | | | ACPBPOD5974621700 | 11/07/2017 | 11/07/2018 | EACH OCCURRENCE | $ 1,000,000 |
| | CLAIMS-MADE / OCCUR | | | | | | DAMAGE TO RENTED PREMISES (Ea occurrence) | $ 300,000 |
| | X Business Owners | | | | | | MED EXP (Any one person) | $ 5,000 |
| | | | | | | | PERSONAL & ADV INJURY | $ 1,000,000 |
| | GEN'L AGGREGATE LIMIT APPLIES PER: | | | | | | GENERAL AGGREGATE | $ 2,000,000 |
| | POLICY / PRO-JECT / LOC | | | | | | PRODUCTS - COMP/OP AGG | $ 2,000,000 |
| | OTHER: | | | | | | | $ |
| A | AUTOMOBILE LIABILITY | | | ACPBPOD5974621700 | 11/07/2017 | 11/07/2018 | COMBINED SINGLE LIMIT (Ea accident) | $ 1,000,000 |
| | ANY AUTO | | | | | | BODILY INJURY (Per person) | $ |
| | OWNED AUTOS ONLY / SCHEDULED AUTOS | | | | | | BODILY INJURY (Per accident) | $ |
| | X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY | | | | | | PROPERTY DAMAGE (Per accident) | $ |
| | | | | | | | | $ |
| B | UMBRELLA LIAB / X OCCUR | | | ACPCAP5974627100 | 11/07/2017 | 11/07/2018 | EACH OCCURRENCE | $ 1,000,000 |
| | X EXCESS LIAB / CLAIMS-MADE | | | | | | AGGREGATE | $ 1,000,000 |
| | DED / RETENTION $ | | | | | | | $ |
| | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY | | | | | | PER STATUTE / OTH-ER | |
| | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N | N / A | | | | | E.L. EACH ACCIDENT | $ |
| | If yes, describe under DESCRIPTION OF OPERATIONS below | | | | | | E.L. DISEASE - EA EMPLOYEE | $ |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $ |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

**CERTIFICATE HOLDER**

The Mellgren Planning Group
Inc. and Complete Cities
Initiative, Inc.
3350 NW 53rd St Ste 101
Fort Lauderdale, FL 33309

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
Randy Iten



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# BROWARD COUNTY LOCAL BUSINESS TAX RECEIPT

115 S. Andrews Ave., Rm. A-100, Ft. Lauderdale, FL 33301-1895 – 954-831-4000

**VALID OCTOBER 1, 2017 THROUGH SEPTEMBER 30, 2018**

**DBA:** THE MELLGREN PLANNING GROUP INC
**Business Name:** MELLGREN PLANNING GROUP INC THE

**Receipt #:** 327-12915
**Business Type:** BUSINESS/FINANCIAL/CONSULTANT (CONSULTING)

**Owner Name:** MICHELE MELLGREN
**Business Location:** 3350 NW 53 ST STE 101
FT LAUDERDALE
**Business Phone:** 954-475-3070

**Business Opened:** 11/03/1998
**State/County/Cert/Reg:**
**Exemption Code:**

| Rooms | Seats | Employees | Machines | Professionals |
|---|---|---|---|---|
| | | 5 | | |

For Vending Business Only
Number of Machines: Vending Type:

| Tax Amount | Transfer Fee | NSF Fee | Penalty | Prior Years | Collection Cost | Total Paid |
|---|---|---|---|---|---|---|
| 33.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 33.00 |

**THIS RECEIPT MUST BE POSTED CONSPICUOUSLY IN YOUR PLACE OF BUSINESS**

**THIS BECOMES A TAX RECEIPT WHEN VALIDATED**

This tax is levied for the privilege of doing business within Broward County and is non-regulatory in nature. You must meet all County and/or Municipality planning and zoning requirements. This Business Tax Receipt must be transferred when the business is sold, business name has changed or you have moved the business location. This receipt does not indicate that the business is legal or that it is in compliance with State or local laws and regulations.

**Mailing Address:**

MELLGREN PLANNING GROUP INC THE
3350 NW 53 ST STE 101
FORT LAUDERDALE, FL 33309

Receipt #WWW-16-00145021
Paid 07/05/2017 33.00

**2017 - 2018**

## CITY OF FORT LAUDERDALE | BUSINESS TAX DIVISION
## BUSINESS TAX YEAR 2017-2018

100 N. Andrews Avenue, 1ST Floor, Fort Lauderdale, Florida 33301
(954) 828-5195

All-America City

Business ID: 1401051 Business Name: MELLGREN PLANNING GROUP INC
Business Address: 3350 NW 53 ST # 101
Tax Category: OFFICE USE ONLY Tax#: 741853 Fee:

MELLGREN PLANNING GROUP INC
MICHELE MELLGREN PSTD
3350 NW 53 ST # 101
FORT LAUDERDALE, FL 33309

BROWARD COUNTY FLORIDA

# Office of Economic and Small Business Development

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

## *This Certificate is Awarded to:*

## THE MELLGREN PLANNING GROUP, INC.

As set forth in the Broward County Business Opportunity Act of 2012, the certification requirements have been met for:

**County Business Enterprise (CBE)**
**Small Business Enterprise (SBE)**
**Anniversary Date: June 27th**

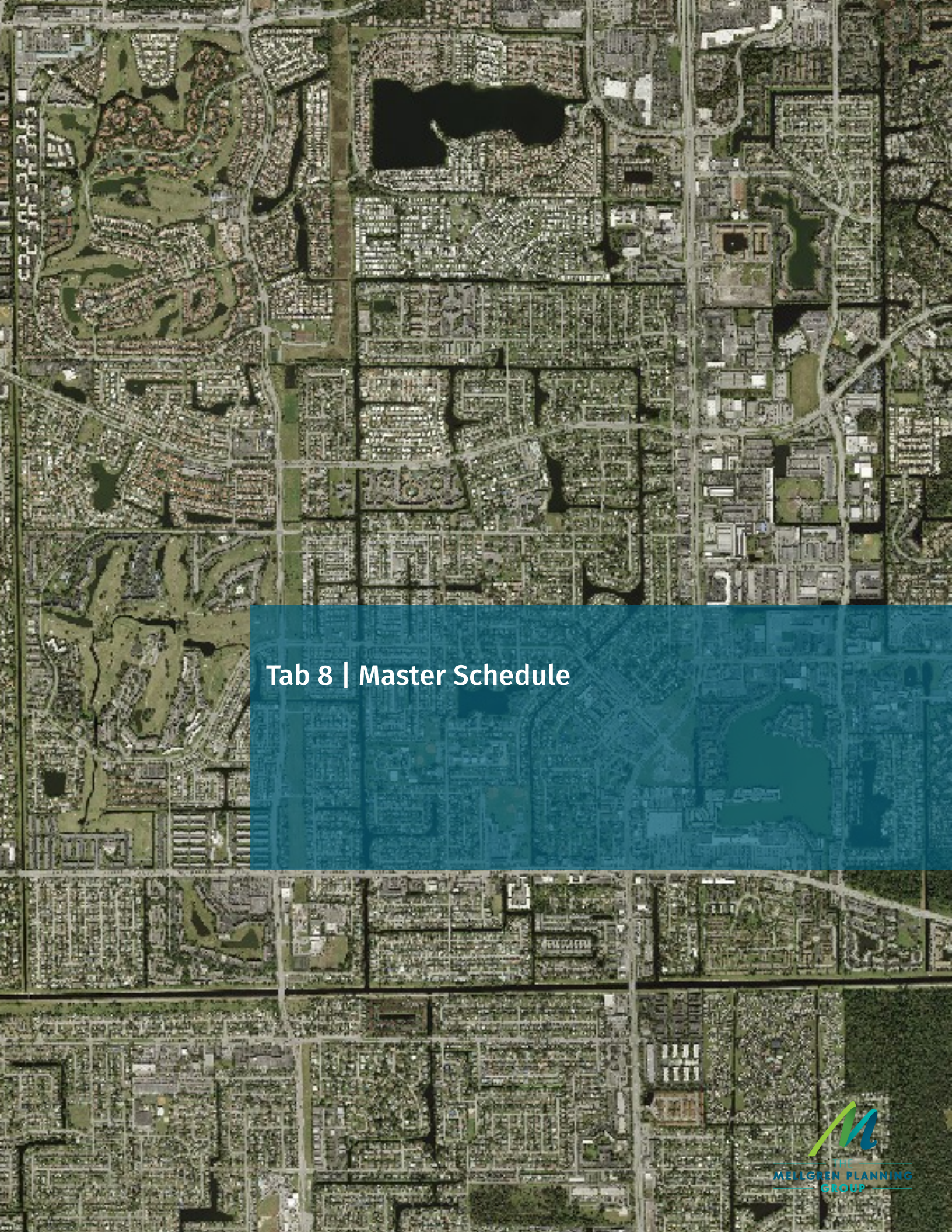
Authorized Representative

The Office of Economic and Small Business Development must be notified within 30 days of any material changes in the business which may affect ownership and control. Failure to do so may result in the revocation of this certificate and/or imposition of other sanctions.

**A Service of the Broward County Board of County Commissioners**
**www.broward.org/smallbusiness**

© GOES 912

LITHO IN U.S.A.



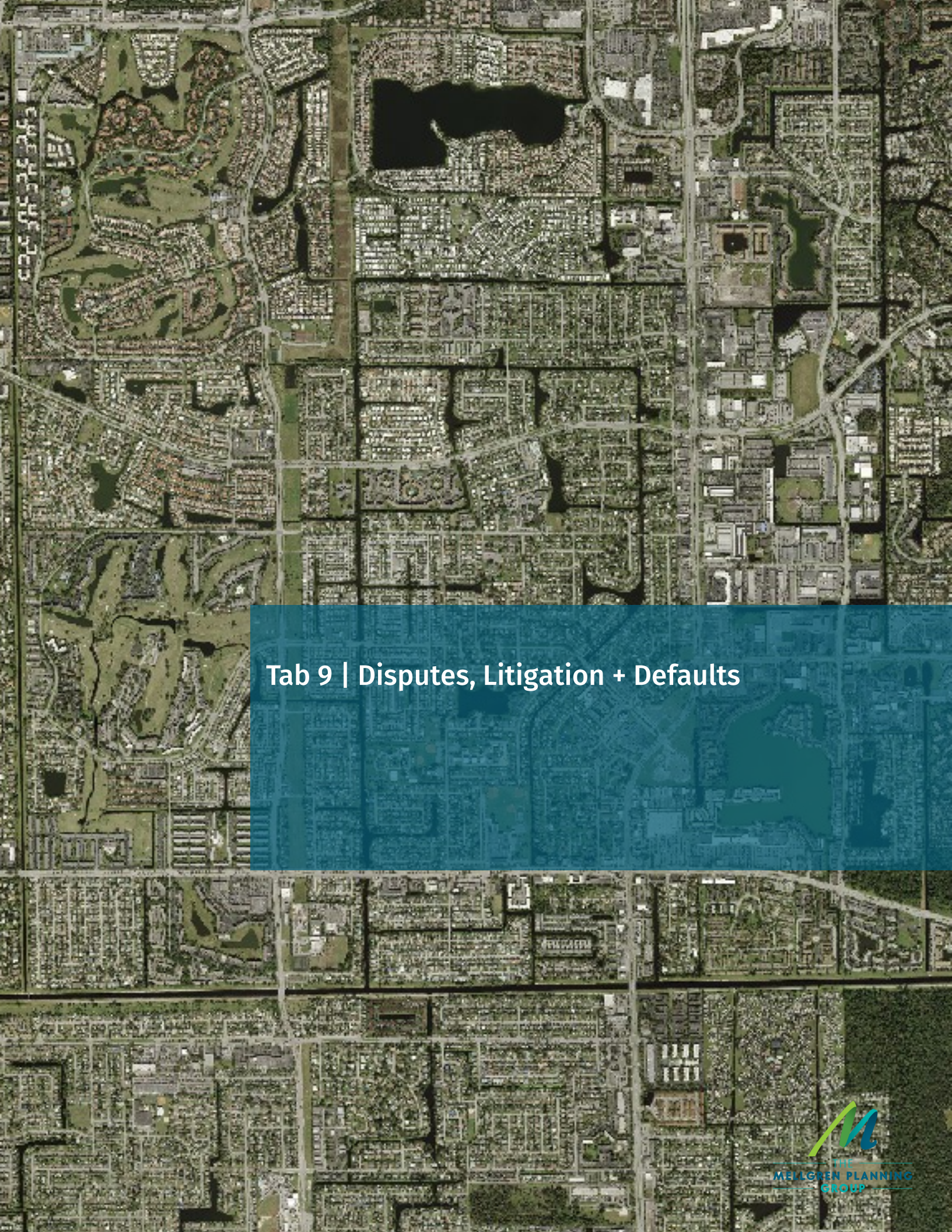
# Tab 8 | Master Schedule

THE MELLGREN PLANNING GROUP

# Master Schedule

THE MELLGREN PLANNING GROUP

| TASKS | MONTH | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| **Assessment of Existing Conditions and Public Input** | | | | | | | | | | | | | | | | | | |
| Develop Public Involvement Plan (1st and 2nd Drafts) | | | | | | | | | | | | | | | | | | |
| City Staff Review (Draft #1) and Approval (Draft #2) | | | | | | | | | | | | | | | | | | |
| Implementation of Public Involvement Plan | | | | | | | | | | | | | | | | | | |
| Summary of Ongoing Public Participation Program and Results | | | | | | | | | | | | | | | | | | |
| Draft Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Limited Amendments to Other Plan Elements | | | | | | | | | | | | | | | | | | |
| Staff Review and Comments: Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Final Draft: Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Schedule for Amendment Adoption Process | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Vision Statement** | | | | | | | | | | | | | | | | | | |
| Public Engagement Process | | | | | | | | | | | | | | | | | | |
| Project Orientation & Background Research | | | | | | | | | | | | | | | | | | |
| Community Engagement 1: Initial Community Outreach | | | | | | | | | | | | | | | | | | |
| Community Engagement 2: Vision Week | | | | | | | | | | | | | | | | | | |
| Community Engagement 3: Additional Data Collection | | | | | | | | | | | | | | | | | | |
| Community Engagement 4: Service & Experience Priorities | | | | | | | | | | | | | | | | | | |
| Community Engagement 5: The Vision Summit | | | | | | | | | | | | | | | | | | |
| Draft Vision Statement | | | | | | | | | | | | | | | | | | |
| City Staff Review & Comments - Draft Vision Statement | | | | | | | | | | | | | | | | | | |
| Final Draft: Vision Statement | | | | | | | | | | | | | | | | | | |
| Integration Strategy with Zoning Code & CRA Plan | | | | | | | | | | | | | | | | | | |
| Narration of Future Planning and Zoning Focus | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Design Statement** | | | | | | | | | | | | | | | | | | |
| Draft Design Statement | | | | | | | | | | | | | | | | | | |
| City Staff Review & Comments - Draft Design Statement | | | | | | | | | | | | | | | | | | |
| Final Draft: Design Statement | | | | | | | | | | | | | | | | | | |
| Integration Strategy for Zoning Code & CRA Plan | | | | | | | | | | | | | | | | | | |
| Narration of Future Design Goals and Objectives | | | | | | | | | | | | | | | | | | |
| **Comprehensive Plan Amendment: Future Land Use Element** | | | | | | | | | | | | | | | | | | |
| 10 Final Copies of Draft Amended Future Land Use Element | | | | | | | | | | | | | | | | | | |
| Dynamic, Digital Version of the Entire Amended Comp Plan | | | | | | | | | | | | | | | | | | |
| Future Land Use Element ONLY | | | | | | | | | | | | | | | | | | |
| Vision Statement | | | | | | | | | | | | | | | | | | |
| Design Statement | | | | | | | | | | | | | | | | | | |
| All Other Elements (Optional) | | | | | | | | | | | | | | | | | | |
| **Meetings With Staff and Monthly Reports** | | | | | | | | | | | | | | | | | | |
| Monthly Written Update | | | | | | | | | | | | | | | | | | |
| In-Person/Conference Call Team Meetings With City | | | | | | | | | | | | | | | | | | |



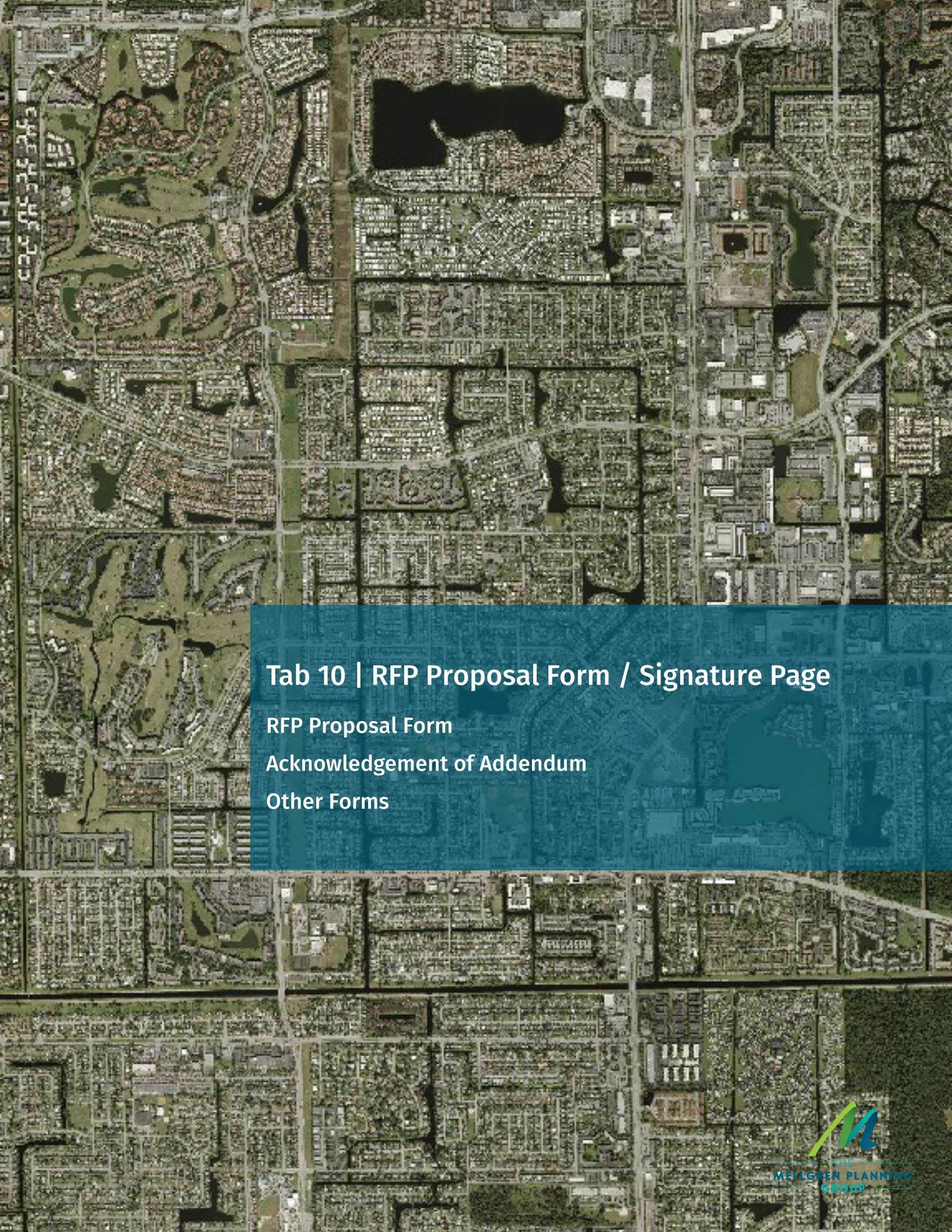
# Tab 9 | Disputes, Litigation + Defaults

THE MELLGREN PLANNING GROUP

# Disputes, Litigation & Defaults

In the history of the firm, The Mellgren Planning Group nor has not been subject to any settlements for any prior litigation, arbitration, mediation, or other judgement in the past five (5) years (or in the history of the firm), nor is there any pending litigation.

Neither Miami Economic Associates, Inc. nor Analytica has been subject to the disputes, litigation, or defaults described above.



# Tab 10 | RFP Proposal Form / Signature Page

RFP Proposal Form

Acknowledgement of Addendum

Other Forms

THE MELLGREN PLANNING GROUP

CITY OF
MARGATE
Together We Make It Great

**RFP PROPOSAL FORM NO. 2018-022a**

**BID TO: CITY COMMISSION**
**CITY OF MARGATE**

1. The undersigned Proposer proposes and agrees, if this proposal is accepted, to enter into an agreement with the CITY in the form included in the contract documents to perform the WORK as specified or indicated in said contract documents entitled:

**REQUEST FOR PROPOSAL (RFP) 2018-022a**
**CITY OF MARGATE COMPREHENSIVE PLAN AMENDMENT CONSULTING SERVICES**

2. Proposer accepts all of the terms and conditions of the RFP documents including disposition of the bid security if required.

3. The RFP will remain open until a contract is awarded unless otherwise required by law. Proposer will enter into an agreement with the CITY, and will furnish the insurance certificates, payment bond and performance bond (if required by the contract documents).

4. It is the Proposer's responsibility to contact the Purchasing Division at (954) 935-5346 prior to the RFP submission date and time to determine if any addenda have been issued on the project. Proposer has examined copies of all the contract documents including the following addenda (receipt of which is acknowledged):

| | | | |
|---|---|---|---|
| Number | 1 | Date | July 11, 2018 |
| | 2 | | July 26, 2018 |
| | | | |

5. Proposer has familiarized himself with the nature and extent of the contract documents, WORK, site, locality where the WORK is to be performed, the legal requirements (federal, state and local laws, ordinances, rules and regulations), and the conditions affecting cost, progress or performance of the WORK and has made such independent investigations as Proposer deems necessary.

6. This Proposal is genuine and not made in the interest of or on behalf of any undisclosed person, firm or corporation and is not submitted in conformity with any agreement or rules of any group, association, organization or corporation. Proposer has not directly or indirectly induced or solicited any other Proposer to submit a false or sham bid/proposal. Proposer has not solicited or induced any person, firm or corporation to refrain from bidding and Proposer has not sought by collusion to obtain for itself any advantage over any other Proposer or over CITY.

To all the foregoing, and including all Proposal Schedule(s), and information required of Proposer contained in this RFP proposal form, said Proposer further agrees to complete the WORK required under the contract documents within the contract time stipulated in said contract documents, and to accept in full payment thereof the contract price based on the total proposal price(s) submitted and agreed upon.

NAME OF FIRM: The Mellgren Planning Group

ADDRESS: 3350 NW 53rd Street, Suite 101; Fort Lauderdale, FL 33076

NAME OF SIGNER: Michele C. Mellgren, AICP
(Print or Type)

TITLE OF SIGNER: Owner / President

SIGNATURE: [signature] DATE: 7/23/18

TELEPHONE NO.: 954-475-3070 FACSIMILE NO.: NA

# ACKNOWLEDGEMENT FORM

## ADDENDUM NO. 1

## RFP NO. 2018-022
## CITY OF MARGATE COMPREHENSIVE PLAN AMENDMENT CONSULTING SERVICES

I acknowledge receipt of Addendum No. 1 for Bid No. 2018-022, City of Margate Comprehensive Plan Amendment Consulting Services. This addendum contains thirty-four (34) pages inclusive of the amended RFP document. Please include the original of this form in your bid submission.

Company Name: The Mellgren Planning Group, Inc.

Address: 3350 NW 53rd Street, Suite 101; Fort Lauderdale, FL 33309

Name of Signer Michele C. Mellgren, AICP, Owner / President
(please print)

Signature: Michele C. Mellgren Date: 7·23·18

Telephone: 954-475-3070 Facsimile: NA

Please fax your completed form to (954) 935-5258 or e-mail to purchase@margatefl.com.

Spencer L. Shambray

Spencer Shambray, CPPB
Purchasing Manager
07/11/2018

**The RFP submission deadline remains Monday, August 6, 2018 at 12:00 P.M. local time.**

NOTE: The original of this form must be included with your bid submission.

# ACKNOWLEDGEMENT FORM

## ADDENDUM NO. 2

## RFP NO. 2018-022a
## CITY OF MARGATE COMPREHENSIVE PLAN AMENDMENT CONSULTING SERVICES

I acknowledge receipt of Addendum No. 2 for Bid No. 2018-022a, City of Margate Comprehensive Plan Amendment Consulting Services. This addendum contains three (3) pages. Please include the original of this form in your bid submission.

Company Name: The Mellgren Planning Group, Inc.

Address: 3350 NW 53rd Street, Suite 101; Fort Lauderdale, FL 33309

Name of Signer (please print) Michele C. Mellgren, AICP

Signature: Michele C. Mellgren Date: July 26, 2018

Telephone: 954-475-3070 Facsimile: NA

Please fax your completed form to (954) 935-5258 or e-mail to purchase@margatefl.com.

Spencer L. Shambray

Spencer Shambray, CPPB
Purchasing Manager
07/26/2018

**The RFP submission deadline remains Monday, August 6, 2018 at 12:00 P.M. local time.**

NOTE: The original of this form must be included with your bid submission.

## Rebekah Brightbill-Dasari

**From:** Rebekah Brightbill-Dasari
**Sent:** Thursday, August 2, 2018 11:36 AM
**To:** 'purchase@margatefl.com'
**Subject:** Acknowledgement of Addendum | RFP No. 2018-022a
**Attachments:** Addendum No. 2 2018-022.pdf; Addendum No. 1 2018-022.pdf

Good Morning,

The Acknowledgement of Addendum 1 and Addendum 2 for RFP No. 2018-022a is attached.

Best Regards,

**Rebekah G. Brightbill-Dasari, CNU-A**
Community Development Planner

CELEBRATING 20 YEARS
THE MELLGREN PLANNING GROUP

3350 NW 53rd Street Suite 101
Fort Lauderdale, FL 33309
Phone: 954.475.3070

## OFFEROR'S CERTIFICATION

WHEN OFFEROR IS A CORPORATION

IN WITNESS WHEREOF, the Offeror hereto has executed this Proposal Form this 23rd day of July, 2018.

The Mellgren Planning Group, Inc.
Printed Name of Corporation

Florida
Printed State of Incorporation

By: _____
Signature of President or other authorized officer

(CORPORATE SEAL)

Michele C. Mellgren, AICP, Owner / President
Printed Name of President or other authorized officer

ATTEST:

By _____
Secretary

3350 NW 53rd Street, Suite 101
Address of Corporation

Fort Lauderdale, FL 33309
City/State/Zip

954-475-3070
Business Phone Number

State of Florida

County of Broward

The foregoing instrument was acknowledged before me this 23RD day of July,

2018, by Jennifer Kiar (Name),
(Title) of

The Mellgren Planning Group, Inc. (Company Name) on behalf of the corporation,

who is personally known to me or who has produced _____

as identification and who did (did not) take an oath.

WITNESS my hand and official seal.

_____
NOTARY PUBLIC

Jennifer Kiar
(Name of Notary Public: Print, Stamp, or type as Commissioned)

NOTARY PUBLIC STATE OF FLORIDA
JENNIFER KIAR
MY COMMISSION # FF917310
EXPIRES: September 10, 2019

# NON-COLLUSIVE AFFIDAVIT

State of Florida )
)ss.
County of Broward )

Michele C. Mellgren, AICP being first duly sworn, deposes and says that:

(1) He/she is the Owner / President, (Owner, Partner, Officer, Representative or Agent) of _____ the Bidder that has submitted the attached Bid;

(2) He/she is fully informed regarding the preparation and contents of the attached Bid and of all pertinent circumstances regarding such Bid;

(3) Such Bid is genuine and is not a collusive or sham Bid;

(4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Bidder, firm, or person to submit a collusive or sham Bid in connection with the Work for which the attached Bid has been submitted; or to refrain from bidding in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Bidder, firm, or person to fix the price or prices in the attached Bid or of any other Bidder, or to fix any overhead, profit, or cost elements of the Bid price or the Bid price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;

(5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any other of its agents, representatives, owners, employees or parties in interest, including this affiant.

Signed, sealed and delivered
in the presence of:

_____

_____

By: _____
(Printed Name)

PRESIDENT
(Title)

## ACKNOWLEDGMENT

State of
County of

The foregoing instrument was acknowledged before me this 23 RP day of July, 2018, by Michele C. Mellgren, AICP, who is personally known to me or who has produced _____ as identification and who did (did not) take an oath.

WITNESS my hand and official seal.

NOTARY PUBLIC

JENNIFER KIAR
MY COMMISSION # FF917310
EXPIRES: September 10, 2019

Jennifer Kiar
(Name of Notary Public: Print, Stamp, or Type as Commissioned)

**OFFEROR'S**
**QUALIFICATION STATEMENT**

The undersigned certifies under oath the truth and correctness of all statements and of all answers to questions made hereinafter:

SUBMITTED TO: City of Margate (Purchasing Manager)

ADDRESS: 5790 Margate Boulevard
Margate, Florida 33063

CIRCLE ONE

SUBMITTED BY: The Mellgren Planning Group
NAME: Michele C. Mellgren, AICP
ADDRESS: 3350 NW 53rd Street, Suite 101; Fort Lauderdale, FL 33309
PRINCIPAL OFFICE: Same as above.

Corporation
Partnership
Individual
Other

1. State the true, exact, correct and complete name of the partnership, corporation, trade or fictitious name under which you do business and the address of the place of business.

   The correct name of the Offeror is: The Mellgren Planning Group, Inc.

   The address of the principal place of business is:

   3350 NW 53rd Street, Suite 101

   Fort Lauderdale, FL 33309

2. If Offeror is a corporation, answer the following:

   a. Date of Incorporation: 1998

   b. State of Incorporation: Florida

   c. President's name: Michele C. Mellgren, AICP

   d. Vice President's name: Michele C. Mellgren, AICP

   e. Secretary's name: Michele C. Mellgren, AICP

   f. Treasurer's name: Michele C. Mellgren, AICP

   g. Name and address of Resident Agent: Michele C. Mellgren, AICP
   3350 NW 53rd Street, Suite 101
   Fort Lauderdale, FL 33309

3. If Offeror is an individual or a partnership, answer the following:

   a. Date of organization: NA

   b. Name, address and ownership units of all partners:

   NA

   c. State whether general or limited partnership: NA

4. If Offeror is other than an individual, corporation or partnership, describe the organization and give the name and address of principals:

   NA

5. If Offeror is operating under a fictitious name, submit evidence of compliance with the Florida Fictitious Name Statute.

   The Mellgren Planning Group is not operating under a fictitious name.

6. How many years has your organization been in business under its present business name?

Eleven (11) years.

a. Under what other former names has your organization operated?

Michele Mellgren & Associates, Inc.

7. Indicate registration, license numbers or certificate numbers for the businesses or professions which are the subject of this RFP. Please attach certificate of competency and/or state registration.

Professional licensure is not required for planning professionals.

The Certificate of Corporation, and local business licenses are attached.

8. Have you ever failed to complete any work awarded to you? If so, state when, where and why?

The Mellgren Planning Group has completed all awarded projects on time and within budget.

**THE OFFEROR ACKNOWLEDGES AND UNDERSTANDS THAT THE INFORMATION CONTAINED IN RESPONSE TO THIS QUALIFICATIONS STATEMENT SHALL BE RELIED UPON BY OWNER IN AWARDING THE CONTRACT AND SUCH INFORMATION IS WARRANTED BY OFFEROR TO BE TRUE. THE DISCOVERY OF ANY OMISSION OR MISSTATEMENT THAT MATERIALLY AFFECTS THE OFFEROR'S QUALIFICATIONS TO PERFORM UNDER THE CONTRACT SHALL CAUSE THE OWNER TO REJECT THE PROPOSAL, AND IF AFTER THE AWARD TO CANCEL AND TERMINATE THE AWARD AND/OR CONTRACT.**

_____
(Signature)

State of Florida

County of Broward

The foregoing instrument was acknowledged before me this 23RD day of

July, 2018, by Michele C. Mellgren, AICP, who is

personally known to me or who has produced _____ as

identification and who did (did not) take an oath.

WITNESS my hand and official seal.

_____
NOTARY PUBLIC

NOTARY PUBLIC STATE OF FLORIDA
JENNIFER KIAR
MY COMMISSION # FF917310
EXPIRES: September 10, 2019

(Name of Notary Public: Print, Stamp,
or Type as Commissioned)