



**PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES
FOR CITY MANAGER FOR NORTH PORT, FL**

RFP #: 2017-36

Colin Baenziger & Associates

Project Manager and Contact Person:

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...Serving Our Clients with a Personal Touch...

PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES

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March 14, 2017

The Honorable Mayor Linda Yates, Vice Mayor Vanessa Carusone, and Commissioners
Christopher Hanks and Debbie McDowell
ATTN: Alla V. Skipper, Sr. Contract Specialist
City of North Port
4970 City Hall Blvd
North Port, Florida 34286

Dear Mayor Yates, Vice Mayor Carusone and Commissioners Hanks and McDowell:

Colin Baenziger & Associates (CB&A) would like to take this opportunity to submit a proposal to assist in finding your next City Manager. While selecting key personnel is never easy, CB&A has developed a problem-free process that has been tested nationwide and found to be extremely effective.

While CB&A is a municipal recruiting firm which has conducted assignments across the country, our home base is Florida. In fact, we have been selected to perform 99 of the last 140 recruitments where a Florida city or county has chosen to use a recruiter to find its City or County Manager / Administrator. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a good fit for your community. As a result, we only take a few clients at a time and focus on getting the job done properly. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and manager selection. We also offer the best warranty in the industry.

Not only do we offer unparalleled service at a reasonable price, we focus on finding just the right people for your organization. We say people, and not person, because our goal is to bring you five finalists who are so good that you will have a difficult time choosing among them. The proof is in the fact that six of our local government clients have passed resolutions thanking us for our outstanding efforts in finding their key staff. We do not know how often you have passed a resolution thanking a consulting firm for its efforts, but we have rarely seen it happen. Our goal, in fact, would be for you to be our next client to pass such a resolution.

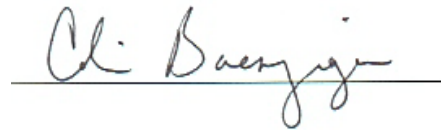
Some of our Florida searches include City Managers for Cooper City, Dania Beach, Destin, Fort Myers, Gainesville, Hallandale Beach, Key Biscayne, Madeira Beach, Melbourne, Miramar, Mount Dora, Northport, Palm Beach Gardens, Palm Coast, and St. Pete Beach. Nationally we have found City Managers for Ankeny, IA; Bellevue, WA; Cape Coral, FL; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also sought the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia), County Managers for Brevard County, FL; Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Polk County, IA; St. Lucie County, FL; St. Johns County, FL; and Union County, NC.

Some of our current searches include the City Managers for Burien, WA, Parkland, FL, Petersburg, VA and Tacoma, WA, Assistant City Managers for Weston, FL and Petersburg, VA, an Economic Development Director for Concord, NH, the District Attorney for St. Lucie County Fire District, FL, a Growth Management Director for Collier County, FL and an Information Services Manager for Cooper City, FL.

Those authorized to bind the company are myself, Colin Baenziger, and Lynelle Klein, Vice President for Operations.

We look forward to formally presenting our credentials and working with you in the near future. If you have any questions, please feel free to contact me at (561) 707-3537.

Sincerely,



Colin Baenziger
Principal / Owner

...Serving Our Clients with a Personal Touch...

I. Search Methodology

The following search methodology has been refined over the past nineteen years and now is virtually foolproof. We will integrate your ideas into the process. Our goal is to ensure you have the right people to interview as well as the information you need to make the right decision.

Phase I: Information Gathering and Needs Assessment

Task One: Needs Assessment

An important part of the recruiter's work is selling the community to the very best candidates (including those that are not actively looking for the next job) while also providing an accurate portrayal of the community and the opportunity. In order to do this, CB&A must first determine the needs of the client and the characteristics of the ideal candidate. Our approach is as follows:

- Compile background information from the jurisdiction's website and other sources.
- Interview the Mayor and Commission, other key parties (such as City staff) and stakeholders (such as community groups, business owners, residents, government officials and property owners). Our goal is to develop a strong sense of your organization, its leadership, its short and long term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will likely include experience, longevity, education, personality, demeanor, and achievements as well as other items the Commission and stakeholders consider important), and
- Determine a reasonable compensation package.

We will also finalize the timeline so candidates can mark their calendars well in advance and will be available when the Commission wish to conduct the interviews.

If the City wishes, we routinely incorporate meetings with other stakeholders (such as the business community, the non-profit community, City staff and so on) to gather their insights. These forums are valuable as they provide additional perspectives and a better understanding of the environment the Manager will be working in.

Task Two: Develop Position Description and Recruitment Materials

Based on the information we gather, CB&A will next develop a comprehensive recruitment profile. We will provide our draft for your review and comment. We will then meet with the Commission to discuss the results of our interviews and the resulting recruitment profile. Your suggestions will be incorporated, and the final document prepared. A sample of our work is included as Appendix B. Other samples can be found on our firm's website under the "Executive Recruitments" / "Active Recruitments" tabs.

Phase II: Recruitment

Task Three: Recruit Candidates

CB&A uses a number of approaches to identify the right people for this position. We say people, and not person, because our goal is to bring you six to ten excellent semi-finalists, all of whom will do the job extraordinarily well and who are so good you will have a difficult time choosing

I. Search Methodology *(continued)*

among them. You then select the top three to five people to interview and ultimately choose the candidate who is the best fit with you and your community. The approaches we use are:

- **Networking:** The best approach is diligent outreach. We will network with our colleagues and consult our data base. As we identify outstanding candidates (many of whom are not in the market), we will approach them and request that they apply. Often excellent candidates are reluctant to respond to advertisements because doing so may alienate their current employers. When we approach them, their credentials are enhanced rather than diminished. We also use LinkedIn as a source of candidates.
- **Advertising** While we will seek out the best, we will not ignore the trade press as it often also yields strong candidates. We intend to advertise through organizations such as the International City/ County Management Association, Florida League of Cities, Florida City and County Management Association and so on. We will also post it on our website, www.cb-asso.com. We generally do not use newspapers or generic websites because while they produce large numbers of applications, they generally do not produce the type of candidates our clients are seeking.
- **Email:** We will also e-mail the recruitment profile to our listserv of over thirteen thousand managers and professionals who are interested in local government management. One of the advantages of e-mail is that if the recipient is not interested, he/she can easily forward the recruitment profile to someone else who may be interested.

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

Based on our most recent recruiting efforts, we anticipate receiving resumes from sixty to one hundred applicants. We will narrow the field as described above and present information on candidates to the Mayor and Commission. This process requires a mixture of in-depth research and subjective evaluation. Our process is as follows.

It should be noted that selecting strong candidates is more an art than a science. While we consider standard ranking factors and the elements of the job, ultimately the most important factor is who we believe will be a good fit with the City and the community. Typically forty percent of our finalists are women and/or minorities.

Specifically, our efforts will involve:

Step One. Resume Review. CB&A will evaluate all resumes and identify the eight to fifteen high quality candidates.

Step Two. Screening Interview. Our lead recruiter, and possibly other senior representatives of the firm, will interview each of these candidates. Using what we learned in Phase I and our experience as managers and recruiters, as well as our unique ability to assess candidates, we will determine whether or not to consider them further.

I. Search Methodology *(continued)*

Step Three. Prepare a Report. We will prepare a written report summarizing the Results of the Recruitment and the top seven to ten candidates. We will forward our report to the Commission.

Step Four. Evaluate the Best Candidates. We will develop materials and background investigations for the top five to six candidates. For those that remain in consideration, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to prepare a written introduction to themselves as part of their preliminary background checks. This is done for several reasons. First, it allows the candidates to tell their own story and balance the negativity that is so often characteristic of the press. It also allows the City to evaluate the candidates' written and communicative skills.
- **Candidate Disclosure Statement:** We will ask candidates if there is anything controversial in their background that we should be made aware of prior to further consideration. While it is unlikely that we find anything not previously publicized in the press, we believe redundant checks offer superior security for our client.
- **Interviews of References:** We tell the candidate with whom we wish to speak. These include current and former Commission Members, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, and others who know the candidate. We also attempt to contact some individuals who are not on the candidate's list. Typically we reach eight to ten people and prepare a written summary of each conversation.
- **Legal Checks:** Through our third party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state and national level; civil records for any litigation at the county and federal level; and bankruptcy and credit.

Search the Internet and Newspaper Archives: Virtually every local newspaper has an archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the governing body. Of course, not all news sources are unbiased and we consider that in our evaluation. This step is conducted in order to quickly discover candidates with problems in their backgrounds and eliminate them.

- **Verification of Education:** We also verify claimed educational degrees to assure the candidate is being totally forthright.

I. Search Methodology *(continued)*

- **Verification of Work History:** We verify employment for the past fifteen years.

The goal in conducting these checks is to develop a clear picture of the candidates and to determine which best meet the criteria established in Phase I. Each of the avenues we pursue adds a piece of the puzzle. We will crosscheck sources, search for discrepancies, and resolve them when we find them. When sensitive or potentially embarrassing items are discovered, they are thoroughly researched. If we conclude the situation is damaging or even questionable, the situation reported to the City, with the City's concurrence, the candidate will be dropped from further consideration.

Note: We firmly believe that all background work we have outlined above should be completed early in the process. That way the client knows the individuals to be interviewed are all top performers and do not have anything embarrassing in their pasts that might come to light after selection. It also means that once our client has made a selection, it can move forward promptly, negotiate a contract and make an announcement.

Task Five: Preparation and Presentation of Candidate Materials

For the selected candidates, CB&A will compile the information we have developed into a complete written report for each recommended candidate. Specifically, this information will include: the candidates' resumes, introductions, references, background checks and internet / newspaper archive search results. A complete sample candidate report is included as Appendix C. We will also provide some advice on interviewing, a series of questions the elected officials may wish to ask (as well as some areas that it is not wise to get into), and some logistical information. The preceding information will be forwarded to you *electronically*.

Task Six: Finalist Selection

Approximately a week after the City has received the candidate materials, CB&A will meet with the elected officials to discuss our findings and make a final determination concerning who will be invited to interview. The City will then select four to six candidates to interview.

Task Seven: Notify All Candidates of Their Status

We will notify the finalists by telephone and give them the opportunity to ask additional questions. We will also provide them with information concerning the interviews and travel if necessary.

CB&A will inform those not selected of their status. Part of the notification will include advice concerning the candidates' resume and/or cover letter so, even though they were not selected to go forward, they will have gained something valuable from participating in the process.

I. Search Methodology *(continued)*

Phase IV: Coordinate the Interview Process and City Manager Selection

Task Eight: Coordinate the Candidate Assessment Process

Prior to the interviews, we will recommend an interview/assessment process for the City's review including means to evaluate the candidates' communication skills, interpersonal skills, and decision-making skills. As part of the process, we will recommend the City Commission observe the finalists in a number of settings. We will also recommend you invite the finalists' spouses so they can spend time in and evaluate your community.

Day #1: The finalists are given a tour of the community by a knowledgeable staff member or resident.

Later, that evening, the Mayor and Commission host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. Your next City Manager will, after all, represent your local government in numerous venues. It is thus important to know how the individual will respond in a social setting. The reception also serves as an ice-breaker whereby the Commission Members and the candidates get to know one another informally.

Day #2: Beginning at approximately 8:00 a.m., the Mayor and Commission as a group will interview each candidate one at a time for approximately an hour. Part of the interviews may include a PowerPoint presentation so the Commission can observe the candidates' presentational skills.

At approximately 1:30 p.m., each candidate will interview individually with each elected official for approximately 30 minutes. These meetings provide the Commission Members with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, Managers succeed and fail based on their interaction with the Commission and the one-on-one interviews are an excellent way to test that interaction.

Task Nine: Debriefing and Selection

Once the interviews have concluded, CB&A suggests the City Commission Members adjourn and hold a meeting a day or two later to select the next City Manager. Although the selection can be made the same day as the interviews, this decision is quite important and we recommend you take some time to consider what you have seen and heard.

In terms of the final selection, we have developed a simple methodology that moves the elected body quickly and rationally to the desired outcome. Once the selection has been made, CB&A will notify the finalists of their status. Candidates are eager to know and we feel it is important to keep them informed.

I. Search Methodology *(continued)*

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

We will then assist in the employment agreement negotiations. Generally, a member of the elected body and the attorney conduct the actual negotiations while we provide advice and assistance concerning the compensation package and contract. We can also take the lead role in the negotiations if desired. We have a standard contract you are welcome to use. Your attorney, of course, will prepare the final contract. Since the basic parameters will have been discussed with the candidates and the candidates have been thoroughly vetted, we expect a relatively prompt agreement.

Task Eleven: Continuing Assistance

Our work is not done when the contract is executed. We will stay in touch with you and your new City Manager. Our goal is to be there to assist in resolving any issues that arise before they become intractable. In fact, at your request, we will conduct a team-building workshop, at no charge, to resolve any difficulties. We simply feel it is part of our job to assure a successful relationship.

Communications: We will provide weekly reports about the status of the search, in writing or by phone, depending upon your preference. At significant milestones we will make the reports in person. We are also available at any time, day or night, to address any questions you have along the way. To do so, we will provide you with our cellphone numbers and you should feel comfortable contacting us whenever you have a question whether it is directly related to the search or, for that matter, anything else related to local government. We want to be responsive and to assist in any way we can.

The City's Obligations

The City will be responsible for providing the facilities for the interview process, coordinating lodging for candidates from outside the area, and making arrangements for the reception. The City will also be responsible for reimbursing the candidates for all expenses associated with their travel, meals, and incidentals for the interview weekend.

The City should also plan to provide the following information, if it is not available on the City's website, to each of the finalists: the current year budget, an organizational chart, the latest completed audit and management letter, any current strategic and long range plans, a copy of the City Charter, any job descriptions and other materials defining the role and duties of the City Manager, and any evaluations of the organization completed in the last year.

II. Proposed Project Schedule

Proposed Project Schedule

The following is the project schedule we suggest for this recruitment and assumes we are selected to perform the search by April 17th. We realize the schedule may need to be adjusted to accommodate the Mayor and Commission Members' availability.

Phase I: Needs Assessment / Information Gathering

- April 26th: CB&A begins meeting with the Mayor and Commissioners and, if suggested, other stake holders to understand the job and its challenges.
- May 2nd: CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back by May 9th.

Phase II: Recruiting

- May 12th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 13,100 local government professionals.
- June 2nd: Closing date for submission of applications.
- June 9th: CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

- July 3rd: CB&A forwards its candidate report and materials to the City. These will include the candidates' resumes, the candidate introduction, and the results of our reference, background and Internet/newspaper archives checks.
- July 10th: City selects candidates for interviews.

Phase IV: Interview Process Coordination and City Manager Selection

- July 20th: City holds reception for the finalists.
- July 21st: One-on-one and full Commission Interviews and decision.

Phase V: Negotiation, Warranty & Continuing Assistance

- Post-Selection: CB&A works with City representatives and the selected candidate on an employment agreement.

III. References and Project Manager Resume

**REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36
REFERENCES - CLIENT LIST – SUBMITTAL FORM**

SUMMARY EXPERIENCE/QUALIFICATIONS/CLIENT LIST (List similar projects, with completion dates showing experience) (At least three (3) in the past five (5) years).

1. Project Location: City of Fernandina Beach, FL
Name of Contact Person: John Miller Telephone # (904) 556-3209
Project Description: CB&A was hired in late June 2015 to find the City's next City Manager.
The City selected Dale Martin, formerly City Manager of Winchester, CT, on September 23, 2015.
Mr. Martin remains with the City.
Total Project Amount: \$ 23,250 Start Date: June 2015 Completion Date: November 2015
2. Project Location: City of Leesburg, FL
Name of Contact Person: John Christian Telephone # (352) 728-9700
Project Description: CB&A began work in May of 2013, to assist the city of Leesburg in finding its next City Manager.
The search was very challenging as at various points in the recruitment finalists withdrew their names from consideration and CB&A had to go back out and recruit additional candidates (at no charge to the city.) Al Miner, then City Manager of Sebastian, FL, was selected in December of 2013.
Total Project Amount: \$ 21,500 Start Date: May 2013 Completion Date: December 2013
3. Project Location: City of Melbourne, FL
Name of Contact Person: Kathy Meehan Telephone # (321) 984-7588
Project Description: Colin Baenziger and Associates was selected by the City of Melbourne to find its next City Manager.
Mr. Michael McNeese, formerly City Manager of Sarasota, FL, was selected to become Melbourne's next City Manager on November 30, 2012.
Total Project Amount: \$ 21,500 Start Date: 08/30/12 Completion Date: 11/30/2012
4. Project Location: City of Miramar, FL
Name of Contact Person: Yvette Colbourne Telephone # (954) 560-5161
Project Description: CB&A began the search for Miramar's next City Manager on May 13, 2013.
The City selected Ms. Kathleen Woods-Richardson, formerly Director of Public Works and Waste Management for Miami-Dade County, on August 21, 2013. She began working for the City on September 9, 2013.
Total Project Amount: \$ 21,500 Start Date: 05/13/13 Completion Date: 09/09/13
- FIRM NAME** Colin Baenziger & Associates

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III. References and Project Manager Resume (continued)

Colin Baenziger, M.P.A.

Principal

Colin Baenziger is a student of local government and responsible for the executive recruitment functions at Colin Baenziger & Associates. Over the years, he has worked with a number of cities on recruitments and on management, operational, and organizational issues. As a former manager and someone who actively consults with governments, he understands what it takes to do the manager's job effectively. Furthermore, because he is active in a number of professional associations, he knows many of the nation's managers on a first-name basis.



Some of Mr. Baenziger's searches for local governments include:

- City Manager, Coral Gables, FL (population 42,000)
- City Manager, Cottonwood Heights, UT (population 34,000)
- City Manager, Fife, WA (population 8,200)
- City Manager, Fayetteville, NC (population 208,000)
- Village Manager, Key Biscayne, FL (population 11,000)
- Economic Development Director, Loudoun County, VA (population 326,000)
- Community Development Director, Miami, FL (population 373,000)
- Borough Manager, Matanuska-Susitna Borough, Alaska (population 88,000)
- City Manager, Mount Dora, FL (population 12,000)
- County Manager, Clackamas County, OR (population 380,000)
- City Manager, Palm Coast, FL (population 51,000)
- City Manager, Portland, ME (population 65,000)
- City Manager, Roanoke, VA (population 96,000)
- City Manager, Tacoma, WA (population 200,000)
- General Manager, Tampa Bay Water Authority (serving a population of 2.4 million)
- County Manager, Union County, NC (population 290,000)

Other recent efforts include a strategic planning session for the Florida Association of Special Districts, an operational review of Tamarac's water utility, a business practices review for a division of Martin County government, an operational reconciliation for Palm Beach County Water, development of an automated system to pay royalties to featured recording artists for the Recording Industry Association of America, and a review of financial procedures for a division of the Marriott Corporation.

Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association. He has also been called upon frequently to speak at conferences of the Utah and Florida City/County Managers' Associations, and the Florida Public Personnel Association.

IV. What Sets Us Apart

What Sets Us Apart

While all the recruiting firms follow fairly similar recruiting processes, there are some important nuances you should be aware of when comparing prices.

- Over the last 19 years, we have refined our approach so it is problem free.
- Potential candidates tell us we are the best in the industry at describing the opportunity and what the City is actually looking for.
- We actually recruit the best candidates while some firms rely solely on advertising.
- Our background checks are the most thorough in the industry and are completed prior to presenting any candidates for the City's consideration. That is important because you are guaranteed that you are interviewing only high performers with clean backgrounds and you will be able to immediately make an offer to the selected candidate.
- Our candidate pools are diverse. Typically, 40% of our finalists are female and/or minorities.
- We are always on time – we have never missed a major project milestone.
- We are always on budget – we have never asked a client for more than we initially bid.
- We are extremely customer and candidate focused. We will communicate regularly and you will have Colin Baenziger's cell phone number. He is always available as is his assistant. Further our candidates tell us we are the best in the industry when it comes to keeping them informed.
- We work extremely well with the Press, if you would like us to be your representative to them. We are quite content not to do so but it is a skill we have.
- The quality of our effort is unmatched!

The preceding is what separates us from our competitors and has led to us doing over 70% of the City and County Manager searches in the State of Florida where a recruiting firm is utilized since 2005. More importantly, it is what has led to our success in finding and producing the best candidates for your position!

V. Cost Proposal

The City reserves the right to negotiate any and all terms, prices and conditions of the quote proposal. The quote proposals will be reviewed, evaluated and determined based on the format and content outlined in this solicitation.

The City reserves the right to reject the quote submittal of any quoter who has previously failed to perform properly, or on time, contracts of similar nature; or who is not in a position to satisfactorily perform the contract.

REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36

COST PROPOSAL

SAMPLE COST PROPOSAL:

THE FOLLOWING "SAMPLE COST PROPOSAL" IS OFFERED AS A GUIDE ONLY AND NOT A COMPETITIVE LIMITING DEVICE:
A complete price proposal to include a not-to-exceed amount inclusive of all fees and expenses (labor, equipment, materials travel, printing, etc).

COST PHASE	
Phase I: Needs Assessment and Information Gathering (Include: Commission meeting and individual meetings with each of the commissioners)	\$ 3,000
Phase II: Recruiting	\$ 10,000
Phase III: Candidate Screening and Semi-Finalist	\$ 9,000
Phase IV: Review, Selection & Interviews (include Commission meeting)	\$ 1,500
Phase V: Contract Negotiations (If requested) (Include Commission meeting)	\$ 1,000
NOT-TO EXCEED AMOUNT	\$ 24,500

OPTIONAL COSTS: If there are additional services that you can provide that you feel the City may benefit from, please provide a description and cost for those services.

The City will issue a Purchase Order under the terms and conditions of this solicitation and the awarded proposal to complete the work. Should the Consultant require the City to sign an agreement, the Consultant shall submit a sample agreement in this section of the response.

VI. Submittal Signature Form

REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36 SUBMITTAL SIGNATURE FORM

The signature below is a guarantee that the proposer shall not withdraw his/her quote for a period of ninety (90) days after the scheduled quote proposal due date. If notified of the acceptance of the submittal, the undersigned agrees to accept the form of contract designated in this RFP Quote by the City for the stated compensation in the form as prescribed by the City.

The undersigned further certifies that he/she has read the Request for Proposal Quote, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this quotation is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

As addenda are considered binding as if contained in the original specifications, it is critical that the contractor acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. _____ Dated _____ Addendum No. _____ Dated _____
Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Company Information

Type of Organization (Please Check One):

Individual Ownership ☒ Joint Venture _____ LLC/LLP _____
Partnership _____ Corporation _____ OTHER _____

Federal Identification Number: 20-8185763

Is this a Florida Corporation: ☐ Yes or ☐ No

If not a Florida Corporation,

In what state was it created: _____

Name as spelled in that State: _____

What kind of corporation is it: ☐ "For Profit" or ☐ "Not for Profit"

Is it in good standing: ☐ Yes or ☐ No

Authorized to transact business
in Florida:

☐ Yes or ☐ No

State of Florida Department of State Certificate of Authority Document No.: _____

Respondent shall submit proof that it is authorized to do business in the State of Florida unless registration is not required by law.

Does it use a registered fictitious name: ☒ Yes or ☐ No

DBA (if any): Colin Baenziger & Associates

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VI. Submittal Signature Form (continued)

REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36 SUBMITTAL SIGNATURE FORM

Company Name Coln Baenziger & Associates

<u>(561) 707-3537</u>	<u>Colin@cb-asso.com</u>	<u>(888) 635-2430</u>
Telephone #	E-Mail	Fax #

2055 South Atlantic Avenue, Suite 504, Daytona Beach Shores, FL 32118
Mailing Address

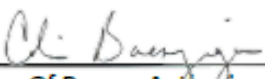
Same as above
Location Address

<u></u>	<u></u>	<u></u>
City	State	Zip Code

<u></u>	<u></u>	<u></u>
Telephone #	E-mail	Fax #

Colin Baenziger, Principal / Project Manager
Print Name & Title of Firm Representative (Contact Person)

<u>Colin Baenziger</u>	<u>03/14/17</u>
Print Name Of Person Authorized To Bind The Company	Date


Signature Of Person Authorized To Bind The Company

Do you accept Visa as payment for goods/services? ☐ YES ☒ NO

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VII. Conflict of Interest

REQUEST FOR PROFESSIONAL SERVICES QUOTE NO. 2017-36 CONFLICT OF INTEREST SUBMITTAL FORM

F.S. §112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City either directly or indirectly. Therefore, please indicate if the following applies:

PART I:

- ☐ I am an employee, public officer or advisory board member of the City
_____(List Position or Board)
- ☐ I am the spouse or child of an employee, public officer or advisory board member of the City
Name: _____
- ☐ An employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner, director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child.
Name: _____
- ☐ Respondent employs or contracts with an employee, public officer or advisory board member of the City
Name: _____
- ☒ None of The Above

PART II:

Are you going to request an advisory board member waiver?

- ☐ I will request an advisory board member waiver under §112.313(12)
- ☐ I will NOT request an advisory board member waiver under §112.313(12)
- ☒ N/A

The City shall review any relationships which may be prohibited under the Florida Ethics Code and will disqualify any vendors whose conflicts are not waived or exempt.

BUSINESS NAME: Colin Baenzgier & Associates

NAME (PER AUTHORIZED TO BIND THE COMPANY): Colin Baenziger

SIGNATURE:  DATE: 03-14-17

THIS PAGE MUST BE RETURNED