

The logo for BJM Consulting, Inc. features the letters "BJM" in white on a blue square background, followed by the text "Consulting, Inc." in green. A horizontal line is positioned below the text.

BJM Consulting, Inc.

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President
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April 12, 2004

Deborah M. Hooker, Esq.
401 N.W. 6th St.
Okeechobee, FL 34972

Dear Ms. Hooker;

We are submitting our proposal to you for the development of a strategic business plan for economic development, three alternate supporting budgets for economic development programs and services, and a marketing plan with alternate budgets, for Okeechobee County, Florida.

Our team of consultants consists of seasoned professionals in each area of expertise required for developing the business plan, marketing plan and budgets.

We believe that our approach will benefit the Okeechobee Development Authority in the following areas:

- We are independent of any historical events that might influence the outcome of the planning process.
- Our professional team assigned to this project has over 70 years of combined experience in economic development, marketing and finance.
- Our team is capable of delivering a product that can be relied upon and trusted in your future economic development efforts.
- Our team has over 50 years combined experience in formulating consensus building, strategic planning and skillfully addressing complex and sensitive issues.

We will address all of the issues and deliverables that you have outlined in your proposal. Our fees are based on the information that you have provided in the RFP and on our previous experience in addressing similar projects. However, if you believe that we have misinterpreted any of your information we can adjust our fee accordingly.

We look forward to discussing the project with you further. If you have any questions or if we can provide any more information concerning the proposal please call.

Sincerely,
Joe Mazurkiewicz, Jr.
President

***Okeechobee
Development
Authority***
Airport and Business Coalition

**Response to RFP
for
Development of a Business Plan
for
Economic Development
in
Okeechobee County**

Prepared by:



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Proposed Bid Prices

Bid Price for Performing Tasks Outlined in RFP and Attachment A	<u>\$23,500.00</u>
Estimated Travel Expenses (Actual Expenses Billed)	<u>\$1,000.00</u>
Estimated Out of Pocket Expenses	<u>\$500.00</u>

Our proposal and pricing are based on the items and requirements established in the Okeechobee Development Authority Request for Proposal for Services and Qualifications for preparation of Business Plan for Economic Development in Okeechobee County. The requirements outlined in the RFP are, also, enumerated in Attachment A of this proposal.

Proposed Schedule and Tasks

The schedule for developing the business plan, marketing plan and budgets is presented on the following page. The schedule addresses tasks that have been identified in the RFP prepared by the ODA.

The schedule has been developed on a relatively fast schedule. Depending upon the availability of steering committee participants to meet, the schedule can be adjusted accordingly.

It is our understanding that this is the first economic development business plan for the County and, therefore, understand the sensitivity of certain issues relating to the development of a plan. We are prepared to carefully manage each integral component of the planning process in order to ensure success for the implementation of the plan. Our goal is to solicit collaboration among all potential participants in the economic development process for Okeechobee County.

We will make every effort to complete tasks on a final schedule that we mutually develop. Please notice in our proposed schedule that we have anticipated a project start date to begin during the first week in May 2004.

(See Attached Schedule)

List of Primary Consultant and Sub Consultants

The primary consultant is BJM Consulting, Inc. Joe Mazurkiewicz, President of BJM Consulting, is the lead project consultant. BJM Consulting will retain the services of Marketing and Public Relations Consultant Chris Spiro of Cape Coral, FL as a sub-consultant for the project.

The following describes the roles and amount of estimated time each member of the consulting team will expend on the project:

BJM Consulting, Inc.

Joe Mazurkiewicz, BJM Consulting, will be responsible for project coordination, coordinating and directing strategic planning sessions, guiding ODA steering committee to attain required goals of planning sessions, providing overview of marketing and financial components of the development of the business plan.

Education and professional qualifications:

Joe attended the University of Florida where he studied engineering, he earned his Bachelor's Degree in Administration from Barry University, and a Master's of Science in Administration from Central Michigan University. He is currently Vice President of Development, and Director of the Public Administration Program at IMPAC University. In his work with the University Joe is recognized as an expert in conducting strategic visioning sessions throughout Southwest Florida. He has successfully conducted them for governments, private and public nonprofit organizations and private for profit companies.

Carl Rowland, BJM Consulting, will be responsible for research of demographic and economic data, financial analyses, budget development for strategic business plan and marketing plan, assistance with strategic planning process and writing and editing final plan.

Education and professional qualifications

Carl Rowland

Master of Public Administration Degree in Finance, University of Georgia
Bachelor of Arts in Political Science, University of Georgia.

Chris Spiro, President/CEO of Spiro and Associates Marketing Advertising and Public Relations, will be responsible for the development of marketing plan components including marketing analysis, internal marketing plan, external marketing plan, marketing strategy, marketing methodology and the marketing process.

Education and professional qualifications:

Christopher T. Spiro is Chief Executive Officer, President and Creative Director. Chris grew up in Southwest Florida and started in the advertising business as an art director with Imagery Advertising. He subsequently worked as a designer, art director and creative director with The Advertising Center, ADMARK 3, ADWORKS and Tibco Inc. before forming his own design agency, The Spiro Group Inc. In 1994, he joined forces with William E. Waites to form Spiro & Waites. (After Mr. Waites' retirement, the firm was renamed Spiro & Associates, on Dec. 16, 2002.)

Chris has worked on a wide range of local and regional business, from restaurants and high-end real estate developments to motorcycles and spas. He participates fervently and actively in numerous community, civic and business groups, which by extension gives our clients an edge in many ways. He has been a member of the board of directors for many such groups as well.

The Lee Building Industry Association has named Chris "Marketing Director of the Year/Agency" for the years 2002, 2000 and 1999. He was honored with the Sam Walton Business Leader Award; the Business Support Award from LARC; and has been a finalist for the Cape Coral Citizen of the Year Award three years running. He was one of *The News-Press's* "People to Watch in 2001." He completed The Disney Approach to Leadership Excellence, an educational program in Lake Buena Vista attended by top executives from throughout the nation. He was a featured panelist at the Florida Home Builders Association's Southeast Builders Conference in Orlando, and is a graduate of Cape Coral Police Department's inaugural Business Police Academy.

Gulfshore Business magazine, covering Southwest Florida, named him to its first-ever "40-under-40" list of top achievers under age 40. He is the only advertising CEO and creative director to receive the honor.

Chris was the youngest president in the nation to lead a senior American Advertising Federation organization, when he served in that leadership role with the Advertising Federation of Southwest Florida. Under his leadership, the national organization named the Southwest Florida group "Club of the Year" and Chris "President of the Year," both firsts in the then 22-year history of the local chapter. In recognition of his dedication to the profession, the organization decorated Chris with the Silver Medal Award, the highest honor bestowed by the Ad Fed on an individual at the local level.

Chris is a member of the boards of director for the Cape Coral Community Foundation. He serves on the City of Cape Coral Economic Development Advisory Board, is a past chairman of the Cape Coral Council for Progress and its board of directors, and past chairman of the board of the Chamber of Commerce of Cape Coral.

Similar Projects Conducted by Each Consultant

Joe Mazurkiewicz: President for BJM Consulting, Inc., a firm that specializes in local government activities. In 1983 he was elected Mayor of Cape Coral, a position he held for ten years. During his service as Mayor he led the City in its attempt to change from a bedroom community to an urban center. Presently, Joe works on a variety of local issues ranging from land use cases to incorporation studies. His firm has completed incorporation studies for Pelican Bay, Fort Myers Beach, Golden Gate, Bonita Springs, Boca Grande, Cape Haze, and Captiva. He is presently developing studies for Lehigh Acres and Ruskin. The firm has also been in contact with leaders from North Fort Myers, Pine Island, and other South Florida communities. Joe also writes a weekly column for the Fort Myers NewsPress, focusing on local government issues.

Prior to affiliation with BJM Consulting Carl Rowland was involved in the following

City of Thomasville, GA – served for 12 years as Chief Financial Officer for the City of Thomasville and City Clerk to the City Commission. He, also, for 6 years served as Business Manager for the City of Thomasville Utilities Division. In those positions Carl Rowland was involved in the following relevant projects and activities:

- Served on the Thomasville Payroll Development Authority as ad hoc City staff member for 17 years.
- Served on Downtown Development Authority as ad hoc City staff member for 12 years.
- Served on the Destination Thomasville Tourism Authority for 8 years as ad hoc staff member.
- Developed annual budgets for all authorities in Thomasville – Thomas County.
- Served as point of contact staff for new and expanding industries.
- Prepared local economic analyses on a business case basis for business expansions or new locations.
- Served as a team member in developing a multi – jurisdictional development authority in Southwest Georgia.
- Developed numerous financial models for assessing economic development impact on local tax base.
- Participated with Georgia Institute of Technology in several studies regarding the feasibility of establishing plants in an agricultural region.

Spiro & Associates Marketing, Advertising, & Public Relations is the area's largest full-service agency. We offer comprehensive creative, media and production services including collateral materials; print, broadcast and outdoor advertising; promotions; public relations and media relations services; event management; and media planning and buying.

The agency represents a variety of local, regional and national clients including land developers, builders, small-business owners, medical professionals, attorneys, retail and marine businesses.

Spiro & Associates brings a philosophy and approach to its clients' communications programs that include learning as much as it can about the target markets, using that information to develop strategies that assure success, and creating communications programs that get noticed, get remembered and get action.

Spiro & Associates is the Agency of Record for the City of Cape Coral, in the first year of a three-year contract for both its Parks and Recreation Department and the Office of Economic Development. Because of the City's continued satisfaction with Spiro & Associates, the City has renewed the company's contract twice, for a total of six continuous years of service.

The company's creative work with the city, including assisting the downtown Community Redevelopment Agency, took "the longest running bad news headline in Southwest Florida and turned it into a positive" according to one former mayor. We convinced city leaders and the citizenry to work together to make a positive change to the city's image. Our expertise led to the formation of public-private partnerships, and graphic elements that have since been shared among city entities and businesses in successfully marketing themselves.

The company has also done economic development marketing work for DeSoto County to create a community profile and print advertising, as well as providing consultation services.

Spiro & Associates has been recognized as a leader in the advertising industry with hundreds of awards, including one of only five Silver Awards presented by the National Sales and Marketing Council in 2000. Other top honors include Florida Home Builders Association Excel Awards; multiple American Advertising Federation 4th District ADDY Award; hundreds of Advertising Federation of Southwest Florida ADDY Awards; Lee Building Industry Pinnacle Awards; Collier Building Industry Association Sand Dollar Awards; and Florida Public Relations Association Image Awards.

List of References

References for Joe Mazurkiewicz

Kirk Beck, CCIM
Beck & Company Inc. Realtor
1832 Victoria Ave.
Fort Myers, Florida 33901
239-337-1010

Mike Quaintance, President
The Chamber of Commerce of Cape Coral
PO Box 100747
Cape Coral, FL 33910
239-549-6900

Martha Warchol
Cottrell Warchol, Merchant & Rollings, L.L.P.
PO Box 100767
Cape Coral, FL 33910
239-542-0700

Nancy Keefer, President
Bonita Springs Chamber of Commerce
25071 Chamber of Commerce Drive
Bonita Springs, FL 34135
239-992-2943

References for Carl Rowland

William T. Berry
City Manager
City of Thomasville
229-227-6987

Ronald C. Becker
Former City Manager
City of Thomasville
229-228-5173

Don Sims
Thomasville-Thomas County Chamber of Commerce
Economic Development Director for Thomasville – Thomas County and
President of the Chamber
229-226-9600

References for Chris Spiro:

Mr. Gary Aubuchon, Chairman
Cape Coral Community Redevelopment Agency
CEO of Aubuchon Homes,
239 -542-1075

Mr. Robert Johns, Director of Development and Special Projects
Family Health Centers of Southwest Florida
Fort Myers,
239- 931-3862.
(former City of Cape Coral Economic Development Director)

Mr. Chris Ferrer
Community Bank of Cape Coral
239 - 281-5756

Mr. Tim Morris
Corvus International
248 - 203-2300

Attachment A

I. Strategic Business Plan for Economic Development

- A. Form an internal ODA Steering Committee to assist the strategic planning process.
 - 1. Identify key community leaders to participate in the strategic planning sessions.
 - 2. Establish dates and locations for the planning sessions.
 - 3. Invite participants to attend.
 - B. Hold Strategic planning session number 1.
 - 1. Welcome and introductions by ODA representative.
 - 2. Explanation of strategic planning process.
 - 3. Conduct group breakout sessions to identify strengths, weaknesses, opportunities and threats analysis (SWOT). This will include internal and external influences.
 - 4. As a total group, identify the key SWOT issues that require action.
 - C. Hold Strategic planning session number 2.
 - 1. Welcome and introductions by ODA representative.
 - 2. Brief overview of first session.
 - 3. Formulate an action plan based upon the SWOT analysis from the first session.
 - a. Mission Statement
 - b. Vision Statement
 - c. Definition of goals, objectives, and strategies to achieve them
 - d. Identify and prioritize projects and programs
 - e. How to implement projects and programs
 - f. Assign responsibility to accomplish projects and programs
 - D. Ask the group to reach consensus.
 - 1. Overview
 - 2. Structuring participation
 - 3. Building consensus
 - E. Measuring impact and performance
 - 1. Overview
 - 2. Evaluation techniques
 - F. Closing comments from ODA.
 - 1. Announce when plan will be available
 - 2. Next steps
 - 3. Thank participants
 - 4. Adjourn
- In addition to the planning sessions, demographic information about Okeechobee County must be gathered, analyzed, and incorporated into

- the final plan. Based upon the findings from the two planning sessions and independent research, the strategic business plan must include the following items: local economic analysis and economic data; a strengths and weaknesses analysis; an action plan including a vision statement, marketing statement and the goals, objectives and strategies to achieve them; and, methods to measure the success of the program.
- The plan must also address potential organizational, board and staff structures.
 - The plan must suggest methods for assigning responsibilities to appropriate parties for implementation and evaluation on an ongoing basis.

As a result of the strategic planning process, the following outcomes will be delivered.

- A. Identification of local improvements needed to be competitive in the current economic development environment.
- B. Identification of the appropriate structure to accomplish the plan.
- C. Identification of several potential board structures for accomplishing the plan.
- D. Identification of the strengths and weaknesses of Okeechobee County.
- E. Identification of the opportunities and threats to Okeechobee County.
- F. Steps and tools needed for making the plan successful.
- G. Steps and tools needed for monitoring the benefits from implementing the plan.
- H. Establishment of a viable roadmap to accomplish a reasonable, attainable economic development effort in Okeechobee County.

II. Potential Budgets to Accomplish Strategic Business Plan

- A. Based upon the information derived from the planning process, three budgets must be prepared for consideration by ODA.
 - 1. Budget one will address a minimum budget with expected outcomes.
 - 2. Budget two will address a medium budget with expected outcomes.
 - 3. Budget three will address an ideal budget with expected outcome.
- B. The budget amounts must be made on a realistic basis within current and future funding opportunities for ODA.

III. Marketing Plan and Budgets

- A. Marketing Plan Components
 - 1. Introduction
 - 2. Marketing Analysis
 - 3. Internal Marketing Plan
 - 4. External Marketing Plan

5. Marketing Strategy
 6. Marketing Methodology
 7. Marketing Process
 8. Targeted Industry List
 9. Visitation Program for Local Companies
- C. Develop Potential Marketing Budgets
- D. Identify potential funding sources
1. Identify potential resources for marketing services
 2. Provide typical costs for marketing activities

As a result of the Marketing Plan, the following outcomes will be delivered.

- A. Identification of companies best suited for location to Okeechobee County.
- B. Identification of consultants who can identify companies best suited for Okeechobee County. Consultants of this type can provide refined lists of potential contacts for direct mail or telephone contact purposes.
- C. Establishment of a viable marketing strategy and process to recruit and retain businesses for Okeechobee County.