

## Background

The Lake Worth City Commission adopted Resolution 47-89 in 1989, creating the Lake Worth Community Redevelopment Agency. The CRA is a quasi-public agency that operates under Florida State Statute 163, Part III. A Community Redevelopment Plan was produced in 1989 to outline the community's desired public and private improvements along with a funding program, including the use of tax increment funds. In 2001, the boundaries of the CRA were expanded to include all of Dixie Highway and the areas including and surrounding 6<sup>th</sup> and 10<sup>th</sup> Avenue, also known as the "Gateways."

The primary source of funding is provided through tax increment financing. Tax increment revenues are deposited into a redevelopment trust fund. The taxable value of all real property in the redevelopment area is determined at a particular year, also known as the "base year." Contributing taxing authorities, such as the City and County, continue to receive ad valorem taxes. Any increase in ad valorem revenue above the base year value is deposited into the redevelopment trust fund and used to carry out redevelopment activities.

The Lake Worth CRA is governed by a seven member volunteer Board appointed by the City Commission. The Board serves the area by implementing Redevelopment Plan objectives and promoting redevelopment activities. The CRA has undertaken substantial projects over the past several years. The Neighborhood Stabilization Program provided the Agency with over \$23M to rehabilitate and build new affordable/workforce housing in the area. The CRA began the LULA, Lake Worth Arts Program in 2008 with the goal of revitalizing the downtown area of the CRA district by infusing arts with other economic development efforts. The goal of the program includes the establishment of a cultural district to support local talent while promoting the City as a destination for the art-related businesses, art and cultural centers and educational arts-related institutions. Recently the CRA has initiated a small business loan program and has a land bank with several properties held for future development.

The Agency's TIF financing has been impacted by both policy decisions and the market over the past few years. Still, the Agency strives to leverage funds and attract private investment into the area by working closely with the City, County, and our community partners.

Dixie Highway, once a bustling retail and commercial center, continues to suffer from a myriad of old and new challenges that include older buildings, underutilized sites and land constraints. Once the "spine" or "Main Street" of the area, this area suffers from a lack of identity and character and in many areas, a lack of attractions or amenities. These challenges impact community livability as more and more business is conducted outside of the City. Goods and services and local jobs are no longer provided close to home and residents leave the area to shop and work. Although demand has been predicted by previous studies, the City continues to lack retail nodes or newer office space for workers. Understanding the City's market potential gives the City leverage with retailers and service providers. Without this understanding and a philosophy of continuous process improvement, the quality of life in a City or area will decline. Dixie Highway may move traffic in a quick fashion but the current form is not sustainable, nor can it be expected to thrive without change and direct intervention.

The City has recently gone through an overhaul of the land-use development regulations. The new ULDR's and the Future Land Use Map (FLUM) should be looked at in context to the developing market. These documents are available on the City's web site at [www.lakeworth.org](http://www.lakeworth.org) and [www.municode.com](http://www.municode.com).

### Submittal of Proposals

The documents included or incorporated in this RFP constitute the complete set of instructions, scope of work, specification requirements and forms. It is the responsibility of the Proposer to insure that all pages are included. Therefore, all Proposers are advised to closely examine this RFP.

All proposals must be typed or written in ink, and must be signed in ink by an officer having authority to bind the company. Signatures are required where indicated; failure to do so shall be cause for rejection of proposal.

### Changes and Interpretations

Changes to this RFP will be made by written addenda. A written addendum is the only official method whereby interpretation, clarification or additional information can be given. All addenda will be posted on the CRA's website - [www.lakeworthcra.org](http://www.lakeworthcra.org). It is the sole responsibility of each Proposer to check the CRA's website for posted addenda. The CRA will not mail or fax any addenda to a Proposer.

All questions regarding this RFP should be submitted in writing via mail or e-mail and must be received by the CRA no later than ten (10) calendar days prior to the due date for proposals:

CRA Office  
29 South "J" Street  
Lake Worth, FL 33460  
[cdabros@lakeworth.org](mailto:cdabros@lakeworth.org)

All questions will be answered via addenda. If a question is not answered, the Proposer should assume all relevant information is contained within this RFP. The CRA will strive to issue all addenda at least three (3) business days before the proposal due date; however, the CRA reserves the right to issue any addenda at any time.

### Property of the CRA

All materials submitted in response to this RFP become the property of the CRA. The CRA has the right to use any or all ideas presented in any response to this RFP, whether amended or not, and selection or rejection of a proposal(s) does not affect this right. No variances to this provision shall be accepted.

### RFP Timetable

The anticipated schedule for this RFP and contract approval is as follows:

- |  |                             |
|--|-----------------------------|
| ▪ Questions from Potential Proposers Due | (March 17, 2015)            |
| ▪ Proposal Response Due                  | (March 17, 2015 at 12pm)    |
| ▪ Short List Announcement (if needed)    | Approximately 2 weeks later |
| ▪ Proposal Selection                     | Approximately 3 weeks later |

The CRA reserves the right to amend the anticipated schedule as it deems necessary.

### Ethics Requirement

This RFP is subject to the State of Florida Code of Ethics and the Palm Beach County Code of Ethics. Accordingly, there are prohibitions and limitations on the employment of City officials and employees and contractual relationships providing a benefit to the same. Proposers are highly encouraged to review both the Florida Code of Ethics and the Palm Beach County Code of Ethics in order to insure compliance with the same.



### **Disclosure and Disclaimer**

The information contained herein is provided solely for the convenience of Proposers. It is the responsibility of a Proposer to assure itself that information contained herein is accurate and complete. Neither the CRA, nor its advisors provide any assurances as to the accuracy of any information in this RFP. Any reliance on the contents of this RFP, or on any communications with CRA representatives or advisors, shall be at each Proposer's own risk. Proposers should rely exclusively on their own investigations, interpretations and analyses in connection with this matter. The RFP is being provided by the CRA without any warranty or representation, express or implied, as to its content; accuracy or completeness and no Proposer or other party shall have recourse to the CRA if any information herein contained shall be inaccurate or incomplete. No warranty or representation is made by the CRA that any proposal conforming to these requirements will be selected for consideration, negotiation or approval.

In its sole discretion, the CRA may withdraw this RFP either before or after receiving proposals, may accept or reject proposals, and may accept proposals which deviate from the non-material provisions of this RFP. In its sole discretion, the CRA may determine the qualifications and acceptability of any firm or firms submitting proposals in response to this RFP. Following submission of a proposal, the Proposer agrees to promptly deliver such further details, information and assurances, including, but not limited to, financial and disclosure data, relating to the proposal and/or the Proposer, including the Proposer's affiliates, officers, directors, shareholders, partners and employees, as requested by the CRA. Any action taken by the CRA in response to proposals made pursuant to this RFP or in making any award or failure or refusal to make any award pursuant to such proposals, or in any cancellation of award, or in any withdrawal or cancellation of this RFP, either before or after issuance of an award, shall be without any liability or obligation on the part of the CRA, or their advisors.

Any recipient of this RFP who responds hereto fully acknowledges all the provisions of this Discloser and Disclaimer and agrees to be bound by the terms hereof. Any proposal submitted pursuant to this RFP is at the sole risk and responsibility of the party submitting such proposal.

### **Contract Agreement**

The terms and conditions of the resulting contract for the services to be rendered will be negotiated with successful Proposer. If the CRA and the successful Proposer cannot agree on the terms and conditions of the resulting contract, the CRA reserves the right to terminate negotiations with the successful Proposers and move to the next ranked Proposer to commence negotiations. Negotiations may continue in this process until the CRA is able to enter into a contract with a Proposer that best meets the needs of the CRA.

### **Insurance Requirements**

Prior to execution of the resulting contract derived from this RFP, the awarded firm shall obtain and maintain in force at all times during the term of the resulting contract insurance coverage as required herein. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. The Certificates shall clearly indicate that the firm has obtained insurance of the type, amount, and classification as required for strict compliance with this provision and that no material change or cancellation of the insurance shall be effective without thirty (30) days prior written notice to the CRA. Compliance with the foregoing requirements shall not relieve the firm of its liability and obligations under the resulting contract.

- A. The firm shall maintain during the term of the contract, standard Professional Liability Insurance in the minimum amount of \$1,000,000.00 per occurrence.

- B. The firm shall maintain, during the life of the contract, commercial general liability, including public and contractual liability insurance in the amount of \$1,000,000.00 per occurrence (\$2,000,000.00 aggregate) to protect the firm from claims for damages for bodily and personal injury, including wrongful death, as well as from claims of property damages which may arise from any operations under the contract, whether such operations be by the firm or by anyone directly or indirectly employed by or contracting with the firm.
- C. The firm shall carry Workers' Compensation Insurance and Employer's Liability Insurance for all employees as required by Florida Statutes.

All insurance, other than Professional Liability and Workers' Compensation, to be maintained by the firm shall specifically include the Lake Worth CRA as an "Additional Insured".

### **Evaluation and Award**

The CRA will assemble an Evaluation Committee to evaluate the proposals from Proposers. The Evaluation Committee will convene for a public meeting to evaluate and rank the most advantageous proposals and make a recommendation for contract award to the CRA Board. The Procurement Official will notify all submitting Proposers and advertise the Evaluation Committee meeting in the appropriate media as directed by law. The CRA Board is not bound by the recommendation of the Evaluation Committee and the CRA Board may deviate from the recommendation in determining the best overall responsive proposal which is most advantageous and in the best interest of the CRA District.

Each Proposal will be evaluated individually and in the context of all other proposals. Proposals must be fully responsive to the requirements described in this RFP and to any subsequent requests for clarification or additional information made by the City through written addenda to this RFP. Proposals failing to comply with the submission requirements, or those unresponsive to any part of this RFP, may be disqualified. There is no obligation on the part of the CRA to award the proposal to the lowest priced proposer, and the CRA reserves the right to award the contract to the Proposer submitting the best overall responsive proposal which is most advantageous and in the best interest of the CRA District. The CRA shall be the sole judge of the proposals and the resulting contract that is in its best interest and its decision shall be final.

While the CRA allows Proposers to specify any desired variances to the RFP terms, conditions, and specifications, the number and extent of variances taken will be considered in determining the Proposer who is most advantageous to the CRA. **Evaluation Scoring Criteria has been incorporated into the RFP document specifics.**

### **Representations by Submittal of Proposals**

By submitting a proposal, the Proposer warrants, represents and declares that:

- A. Person(s) designated as principal(s) of the Proposer are named and that no other person(s) other than those therein mentioned has (have) any interest in the proposal or in the anticipated contract.
- B. The proposal is made without connection, coordination or cooperation with any other persons, company, firm or party submitting another proposal, and that the proposal submitted is, in all respects, fair and in good faith without collusion or fraud.
- C. The Proposer understands and agrees to all elements of the proposal unless otherwise indicated or negotiated, and that the proposal may become part of any contract entered into between the CRA and the Proposer.



D. By signing and submitting a proposal, Proposer certifies that Proposer and any parent corporations, affiliates, subsidiaries, members, shareholders, partners, officers, directors or executives thereof are not presently debarred, proposed for debarment or declared ineligible to bid or participate in any federal, state or local government agency projects.

E. Pursuant to 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted firm list maintained by the State of Florida may not submit a proposal to the CRA/City of Lake Worth for 36 months following the date of being placed on the convicted firm list. Proposer certifies that submittal of its proposal does not violate this statute.

F. Proposer recognizes and agrees that the CRA will not be responsible or liable in any way for any losses that the Proposer may suffer from the disclosure or submittal of proposal information to third parties.

### **Protests**

Any actual Proposer who is aggrieved in connection with this RFP may protest such procurement. The protest must be filed with the CRA in accordance with the City's procurement code. A complete copy of the City's procurement code is available on-line at [municode.com](http://municode.com) under the City's code of ordinances (sections 2-111 – 2-117). The protest procedures are set forth at section 2-115. There are strict deadlines for filing a protest. Failure to abide by the deadlines will result in a waiver of the protest.

### **Compliance**

All proposals received in accordance with this RFP shall be subject to applicable Florida Statutes governing public records including without limitation Chapter 119, Florida Statutes.

## **END OF GENERAL INFORMATION**

### **PROJECT SCOPE**

The goal of this market study is to complete and assessment of the entire Lake Worth Dixie Highway corridor (from the Lantana city limit to the West Palm Beach city limit) current economic market and climate, to project its future business development potential, to analyze market sectors and shares, describe business types most appropriate for various areas and to identify opportunity sites for new business creation.

Output must include:

- A comprehensive market and retail feasibility study and gap analyses
- The development of a business strategy plan for the City, in particular the CRA district, including Dixie Highway, the Gateways, Federal Highway and Lake and Lucerne Avenue corridors (between A Street and Golfview Road).
- Retail analyses and strategic leasing plan
- Identification of prospects
- Execution of business leasing strategic plan

The process will involve:

- Data collection – tours and analysis
- Meetings with stakeholders to include CRA Board Members and Staff, City Commissioners and Staff, local businesses, property owners, business associations and residents and business customers. This may include up to two (2) public workshops.
- Analysis of data collected put into report form – this should include all the collected data, analysis, and catalog of commercial properties, including site specific information and tracking of interaction with prospective retailers.
- Presentations to Staff, CRA Board and City - to include up to three (3) publicly held meetings

#### **PROPOSAL REQUIREMENTS:**

All applicants must provide a company introduction, a description of prior experience, the firms capacity and three references including the name of the project referenced , contract time span and dollar amount , contact person and contact information. Responding firms should also demonstrate a clear understanding of the local economy and the CRA's redevelopment plan.

Written text in the proposal must be printed on 8 ½ by 11 paper using 12pt. font.

#### **Process for Consideration of Proposals**

##### Selection Criteria and Points

**Scope of Services** – firm has clear understanding of services needed, the local economy and demonstrates administrative and staffing ability to complete the project in the time specified. 20 points

**Statement of Qualifications** - past record of professional accomplishments with similar studies. Respondents should provide staff resumes. 20 points

**Previous Experience** – past record of professional accomplishments with similar studies and recruitment efforts. - 35 points

**Timetable for Deliverables** – ability to design an approach and work plan to meet project requirements. 10 points

**Project Costs** – quotation of rates, fees or charges and other detailed cost-proposal or cost-breakdown information is reasonable and within budget. 15 points

**Total** – 100 points

CRA Staff will be responsible for ensuring all submittals responded to the RFP accordingly and have provided all the necessary information to be considered “responsive.” This includes handing the proposal in by the time and date specified earlier in this request. The CRA will establish an evaluation committee to



review the proposals and rank them according to the point system explained above. The evaluation committee will then make a formal recommendation to the CRA Board for approval.

**PROPOSER INFORMATION PAGE**

Company Name: \_\_\_\_\_

Authorized  
Signature: \_\_\_\_\_

Signature

Print Name

Title: \_\_\_\_\_

Physical  
Address: \_\_\_\_\_

Street

City

State

Zip Code

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Web Site: \_\_\_\_\_

Federal Identification Number: \_\_\_\_\_

**This is a requirement of every Proposer.**

## CONFIRMATION OF DRUG-FREE WORKPLACE

In accordance with Section 287.087, Florida Statutes, whenever two or more proposals are equal with respect to price, quality, and service which are received by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

(1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

(2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

(3) Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in subsection (1).

(4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 5 days after such conviction.

(5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.

(6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement on behalf of \_\_\_\_\_, I certify that \_\_\_\_\_ complies fully with the above requirements.

\_\_\_\_\_  
Authorized Representative's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Position:

**\*\* If this form is not returned, the City/CRA will assume the Proposer has not implemented a drug-free workplace program. This is a requirement of every proposer.**





RETAIL STRATEGIES RFP RESPONSE:

# LAKE WORTH CRA

RETAIL FEASIBILITY, STRATEGIC PLANNING AND BUSINESS RECRUITMENT

MARCH 27, 2015

PREPARED BY:  
MATTHEW PETRO  
BUSINESS DEVELOPMENT AND CLIENT MANAGEMENT  
RETAIL STRATEGIES, LLC  
BIRMINGHAM, AL

**STRICTLY PRIVATE  
AND CONFIDENTIAL**

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# LETTER OF TRANSMITTAL



Lake Worth (FL) CRA

RFP #02-2015



Dear Selection Committee,

On behalf of Retail Strategies, LLC I am pleased to acknowledge our understanding of the statements and conditions within this RFP, and to present our response to the Lake Worth CRA for Retail Feasibility, Strategic Planning, and Business Recruitment. The scope of this RFP is right in line with the work Retail Strategies has provided to nearly 100 communities in 18 states. With roots in commercial real estate, and leveraging a national network of retail contacts and relationships, Retail Strategies is uniquely qualified to fulfill this RFP for the Lake Worth CRA.

In the subsequent pages of this document, we will outline our approach to this project. If awarded this project, we will assemble a team of highly experienced research and recruitment professionals whose sole commitment is to bring new and vibrant retail and restaurant concepts into the market. Cities such as Lake Worth are ripe for this kind of growth because there is a significant amount of pent up demand for retail, the barriers of entry (costs, competition) are less onerous than larger markets and retailers have realized their stores perform well in such environments.

All of our engagements begin with research, the quantitative assessment of the Lake Worth trade areas (using multiple geographic parameters) in order to understand the customer dynamics at the neighborhood, city and regional levels. We leverage best in class data from a myriad sources including demographic, psychographic, retail gap analysis and, consumer expenditure data in order to identify suitable prospects for specific locations in Lake Worth. In addition, we will deploy experienced retail real estate professionals to Lake Worth for the purpose of conducting an exhaustive assessment of the real estate environment in the market. Our experienced professionals will develop a Strategic Retail Recruitment Plan for entire Lake Worth. This plan will also encompass the particular focus areas outlined by the CRA which include but are not limited to Dixie Highway, the Gateways, Federal Highway and Lake and Lucerne Avenue Corridors. Our team of recruitment professionals, all of whom are licensed real estate professionals, will use this information to drive discussions with the retail prospects who belong in Lake Worth. Retail recruitment success requires a relentless pursuit over a period of time and this is our commitment to the Lake Worth CRA.

Thank you for the opportunity to participate in this process.

Regards,

CHUCK BRANCH

CEO – Decision Data Resources

Partner – Retail Strategies LLC

120 18th Street South, Suite 201

Birmingham, AL 35233

205.871.0353 Direct

205.313.3677 Fax

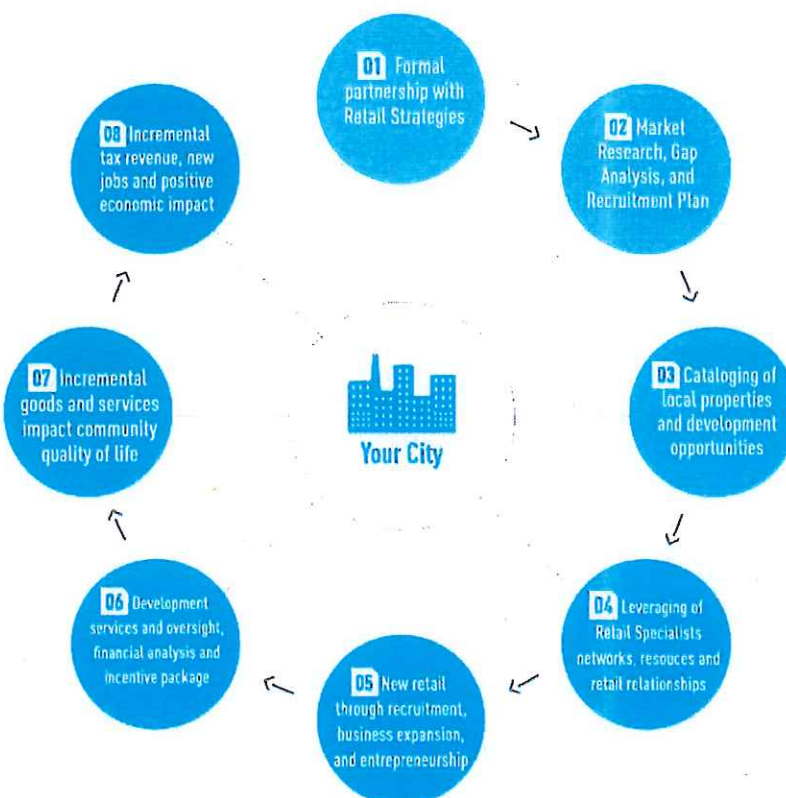
cbranch@decisiondata.net

# EXECUTIVE SUMMARY

Our model is both strategic and comprehensive. Whereas most firms stop after the research and analysis phase, we go well beyond, adding more expertise and value. The current economic environment has taken its toll on cities throughout the country, many of whom rely on volatile retail sales taxes as a primary source of revenue. Basic community services and quality of life depend heavily on a city's ability to broaden the sources of public revenue. This often requires the city to recruit additional retailers, identify local entrepreneurial opportunities, or assist existing businesses in better understanding their potential through detailed market analysis.

To accomplish this, cities today need a plan to address their retail recruitment initiatives. In many instances, city economic development efforts turn to retail consultants to address these issues, only to be left with research reports, a list of retailers, and limited guidance on the actual process of recruiting prospects to their community.

Retail Strategies was formed to help cities take a comprehensive approach to retail recruitment. We go beyond research, recognizing the need for our clients to have a partner involved in the execution of a specific **Retail Recruitment Strategy**.





# COMPANY BACKGROUND & EXPERIENCE



Founded in 2011 with headquarters in Birmingham, Alabama, Retail Strategies, LLC grew out of the need for cities to become more active in the recruitment of retail to their markets. Most cities do not possess the internal resources, relationships, credibility and experience necessary in order to successfully grow their retail base and Retail Strategies becomes an extension of the city team, laser-focused on bringing new retail and restaurant concepts into markets. The firm is currently serving over 100 engaged communities in 18 states. Our business model is highly scalable and the firm is well capitalized which enables us to add staff and resources as the business grows.

Retail Strategies, LLC employs 28 staff members across several disciplines: business development, research, account management, finance, and legal, and administrative support personnel. Our three partners (Robert Jolly, Mead Silsbee and Chuck Branch) have decades of experience in research and all retail estate aspects including project leasing and brokerage, development, property management, and incentives consulting.

In addition to our home office in Birmingham, AL we operate two regional offices in New Orleans and Fort Worth. We also will open a new office in Q2 2015 in New York City.

The principal project manager will be Lauren Turriglio. Lauren will be supported by the firm's partners, research associates, our Executive Vice President in Charge of Client Management and Retail Recruitment, and a team of retail recruitment specialists throughout the life of the Lake Worth CRA engagement.

Detailed team member biographies are to follow:



## OUR TEAM: BIO, LICENCES & CERTIFICATIONS



### **MATTHEW PETRO**

#### **BUSINESS DEVELOPMENT & CLIENT MANAGEMENT**

Matthew is a member of Retail Strategies team assisting in the research and retail recruitment efforts for multiple municipal clients throughout the Southeast. He specializes in the execution of the strategic retail recruitment plan, focusing on the identification of companies to fill the product and service gaps within each city's trade area.

Matthew graduated from the University of Alabama with a bachelor's degree in Marketing and a specialization in Sales.

- Licensed Real Estate Agent in the State of Alabama
- Bachelor's Degree in Marketing from the University of Alabama
- Member of the International Council of Shopping Centers



### **ROBERT JOLLY**

#### **PRINCIPAL**

Robert Jolly co-founded Retail Strategies in 2011 and since then has overseen development of numerous retail projects and has assisted some of the most well-known tenants in the United States with their expansion into new markets throughout the Southeast.

Robert brings years of experience with previous sales and management positions at Eason, Graham, and Sandner, Inc. and Black and Decker Corporation. He was the Birmingham Commercial Rookie of the Year in 1998, named one of the "Top 40 Under 40" in 2004, and "Who's Who of Commercial Real Estate" in 2005 and 2010.

Robert graduated from the University of Alabama majoring in marketing and English. He is a member of ICSC, a life member of the Birmingham Association of Realtors "Million Dollar Sales Club" and in 2008 earned the coveted Certified Commercial Investment Member (CCIM) designation from the Commercial Real Estate Investment Institute. Robert holds a broker's license in Alabama, Mississippi, Georgia, Florida, Tennessee, Louisiana, South Carolina and Oklahoma.

- Licensed Real Estate Agent: Alabama, Mississippi, Georgia, Florida, Tennessee, South Carolina, Louisiana, and Oklahoma
- Certified Commercial Investment Member (CCIM)
- Bachelor's Degree in Marketing and English from the University of Alabama
- Member of the International Council of Shopping Centers





### **CHUCK BRANCH**

#### **PRINCIPAL**

Chuck Branch is the Chief Executive Officer of Decision Data Resources, LLC and co-founded Retail Strategies in 2011. Chuck has spent the past ten years managing the development and implementation of large data and web-based GIS projects. His background includes consulting, project management and product implementation.

Chuck is a graduate of the University of Alabama with a bachelor's degree in accounting and marketing. He is a member of the International Council of Shopping Centers, a Board and Executive Committee member of the Mountain Brook Sports Corporation, a past board member of the University of Alabama Alumni Association and a past board member of the Mountain Brook Chamber of Commerce.

- Bachelor's Degree in Accounting and Marketing from the University of Alabama
- Member of the International Council of Shopping Centers



### **MEAD SILSBEE, III**

#### **PRINCIPAL**

Mead Silsbee co-founded Retail Strategies in 2011 and brings over a decade of real estate experience to the company. Most recently Mead worked on the retail team at Eason, Graham, and Sandner, Inc. in Birmingham, Alabama. He previously held positions at Hamlet Homes and Intermountain Mortgage Company in Park City, Utah.

Mead graduated from the Randolph-Macon College in Ashland, Virginia where he earned a bachelor's degree in history and economics. In 2008, he earned the coveted Certified Commercial Investment Member (CCIM) designation from the Commercial Real Estate Investment Institute and is a member of the International Council of Shopping Centers (ICSC).

- Licensed Real Estate Agent in the State of Alabama
- Certified Commercial Investment Member (CCIM)
- Bachelor's Degree in History and Economics from Randolph Macon College
- Member of the International Council of Shopping Centers



### **WADE ROBINETT**

#### **EXECUTIVE VICE PRESIDENT**

Wade will lead Retail Strategies execution of our clients' strategic plan and recruitment strategy as he oversees the team of Client Managers and Retail Recruiters engaged in each client city.

Prior to joining Retail Strategies, Wade spent twelve years at Colonial Properties Trust, a publicly traded REIT, where he specialized in new development project leasing. He was involved in all aspects related to new developments including site plan design, tenant strategy and leasing execution. Wade's project leasing experience has resulted in developing working relationships with a network of national brokers, developers and retailers. His experience also included ground up development and mixed used projects that incorporated retail, office and residential.

In addition, Wade managed the leasing team for 20 open air centers totaling over five million square feet in Texas, Tennessee, Florida, North Carolina, Alabama, and Georgia. He handled all communication with the asset managers and was responsible for overseeing all deal making. Wade's first ten years in the commercial real estate industry began at Colliers Keenan in South Carolina where he leased distressed shopping centers throughout the Southeast.

- Licensed Real Estate Agent in the State of Alabama
- Bachelor's Degree in English from William and Mary
- Member of the International Council of Shopping Centers



### **LAUREN TURRIGLIO**

#### **CLIENT MANAGER**

Lauren joined Retail Strategies in 2014 with more than a decade of experience in marketing, events, and non-profit business management. She is a client manager for multiple municipalities throughout the country facilitating the recruitment of retail for her clients.

A native of Marietta, Georgia, Lauren now lives in Birmingham. She moved to Alabama in 2004 to begin her career after graduating from the University of Georgia with a bachelor's degree in Consumer Journalism with a concentration in Advertising.

- Bachelor's Degree in Consumer Journalism with a Concentration in Advertising from Georgia
- Member of the International Council of Shopping Centers





### JOE STRAUSS

RETAIL RECRUITMENT COORDINATOR

Joe joined Retail Strategies in 2014 with a background in real estate. He specializes in retail recruitment and focuses on the identification of companies to fill the product and service gaps within each city's trade area.

Prior to joining Retail Strategies, Joe has been doing real estate since 2007 in Tuscaloosa, AL. Joe graduated from the University of Alabama with a bachelor's degree in Finance and a concentration in real estate. He was born and raised in Columbia, SC and in his spare time Joe enjoys going to the lake, playing golf, and making it back to Tuscaloosa to watch Alabama football.

- Licensed Real Estate Agent in the State of Alabama
- Bachelor's Degree in Finance and Real Estate from the University of Alabama
- Member of the International Council of Shopping Centers



### CLAY CRAFT

RETAIL RECRUITMENT COORDINATOR

Clay specializes in retail recruitment and focuses on the identification of companies to fill the product and service gaps within each city's trade area.

Clay graduated from Auburn University in 2010 with a Masters of Landscape Architecture. Clay and his wife Rachel moved to Birmingham in 2012. In his free time Clay enjoys scuba diving, mountain biking and being on the lake.

- Licensed Real Estate Agent in the State of Alabama
- Master's in Landscape Architecture from the Auburn University
- Member of the International Council of Shopping Centers



### JORDAN WILLIAMS

RETAIL RECRUITMENT COORDINATOR

Jordan specializes in retail recruitment and focuses on the identification of companies to fill the product and service gaps within each city's trade area.

Jordan graduated from the University of Alabama at Birmingham with a bachelor's degree in Economics and a concentration in analysis and policy. In his spare time Jordan enjoys Auburn football, golf, basketball, and visits to the farm with his fiancé.

- Licensed Real Estate Agent in the State of Alabama
- Bachelor's Degree in Economics from the University of Alabama at Birmingham
- Member of the International Council of Shopping Centers



**AMANDA BESHEARS**  
DIRECTOR OF MARKETING

Amanda Beshears is the Director of Marketing for Retail Strategies where she specializes in GIS mapping, market research, market development plans, site submittal marketing packages, project coordination, event management, and team operations.

Prior to joining the Retail Strategies team, she gained her experience in Retail Real Estate with The Shopping Center Group where she specialized in Marketing, GIS, and Divisional Office Management. Amanda has 7 years of experience in site selection for over 50 of the largest retailers and restaurants in the United States. She has created site submittal marketing packages for corporate retail real estate committees while being involved in assisting hundreds of retailer site selection decisions.

A native of Destin, Florida, Amanda and her husband Josh now reside in Birmingham. She moved to Birmingham to begin her career after obtaining a Bachelor of Arts degree in Psychology from Auburn University in 2006.

- Bachelor of Arts in Psychology from Auburn University
- Member of the International Council of Shopping Centers



**LAURA MARINOS**  
RESEARCH COORDINATOR

As the Research Coordinator at Retail Strategies, Laura is responsible for all research and market analysis. Laura's primary responsibilities are creating marketing materials, maps, aerials and demographic reports. Laura also assists in database management, client communication, advanced research and the organization of all digital media.

Laura graduated from the University of Alabama at Birmingham in 2011 and earned a Bachelor of Science in Marketing. Laura is originally from Tuscaloosa, Alabama but moved to Birmingham in 2007.

- Bachelor of Science and Marketing from the University of Alabama at Birmingham
- Member of the International Council of Shopping Centers





### **FORD FITTS**

#### **RESEARCH ANALYST**

Ford is a member of the Retail Strategies team assisting in the research and retail recruitment efforts for municipal clients.

He works with business developers and client managers on creating trade areas and research reports for their clients. He brings research experience from working for a strategic advocacy firm in Washington D.C. that served political campaigns, non-profit organizations and corporate clients.

Ford graduated from the University of Alabama with a bachelor's degree in History.

- Bachelor's Degree in History from the University of Alabama
- Member of the International Council of Shopping Centers



### **JACKIE BELL**

#### **RESEARCH AND MARKETING ASSISTANT**

Jackie Bell is the Research and Marketing Assistant for Retail Strategies. Jackie's primary responsibilities are creating strategic plans, GIS mapping projects, and implementing social media concepts.

Jackie earned a degree in Public Relations and Computer Science from the University of Alabama.

- Bachelor's Degree in Public Relations and Computer Science from the University of Alabama
- Member of the International Council of Shopping Centers



**BRAD SIEGAL**  
GENERAL COUNSEL

Brad Siegal serves as General Counsel for Retail Strategies. Brad provides legal assistance and oversight as the firm provides research, strategic planning, and retail recruitment services to municipal clients.

Through his work with developers and municipalities, Brad has assisted and been involved with many city-assisted developments including public infrastructure assistance, municipal lease financing, and development agreement revenue sharing arrangements.

Brad has been a practicing attorney for more than 23 years. He has represented major real estate clients, including investment funds and REIT's in their acquisitions, dispositions, and other commercial activities throughout the United States. He is an AV-Peer reviewed lawyer, a member of several "Best Of" listings, and involved in many real estate specific organizations such as the Attorneys and Executives in Commercial Real Estate (AECRE).

Brad completed his undergraduate degree at The University of Alabama and received his law degree from Vanderbilt University Law School. He currently serves as the Immediate-Past President of the Levite Jewish Community Center and has served on numerous boards for other non-profit organizations throughout the city.

- Undergraduate from the University of Alabama and Law Degree from Vanderbilt University
- Member of the International Council of Shopping Centers





# REFERENCES & EXPERIENCE

## 1. Lake City, FL

- a. Project Name: Lake City, FL Partnership
- b. Project Location: Lake City, FL
- c. Project Start Date: March 2014
- d. Project Completion Date: Ongoing
- e. Project Total Cost: Confidential
- f. Project Overview Summary:

Our partnership with the City of Lake City, FL has yielded major public retail results in the first calendar year of our engagement. Harbor Freight Tools, Sear's Hometown Store, Dairy Queen, Panda Express, and Mattress Firm, have either opened or will locate in Lake City in 2015. In addition to those successes, our team is working with multiple property owners, retailers, and developers to further bolster the retail sector by recruiting retailers and restaurants to fill product and service GAPs within Lake City. One of the opportunities we are assisting with is at the heart of Lake City's Retail Corridor. This project will feature two new to market retailers and multiple other desired concepts. Since our engagement began with Lake City in March of 2014 our team has recruited 10+ retailers that have either publicly announced or signed Letters of Intent for sites in Lake City.

- g. Project Reference
  - i. Dennille Decker  
Executive Director  
Lake City-Columbia County Chamber of Commerce
  - ii. 386-752-3690
  - iii. [dennille@lakecitychamber.com](mailto:dennille@lakecitychamber.com)

## 2. Edmond, OK

- a. Project Name: Edmond Economic Development Authority (EEDA) Partnership
- b. Project Location: Edmond, OK
- c. Project Start Date: May 2013
- d. Project Completion Date: Ongoing
- e. Project Total Cost: Confidential
- f. Project Overview Summary: Edmond, OK is the premiere suburb in the Oklahoma City Metro Area. In our first year of our engagement with the EEDA our team assisted in the recruitment of Aldi, Del Taco, Qdoba, and Firehouse Subs. Thus far in our second year with the EEDA, our firm recruited Black Walnut Café which will open its first store outside of the State of Texas in Edmond, OK. In addition,



Whataburger, Peperoni Grill, and Natural Grocers have located in the market or will locate in 2015. Our firm has also been assisting Council and leadership within the City of Edmond on an incentives request for a \$75 million development which projects to add destination retailers, an entertainment concept, and other quality of life enhancing retail and restaurant concepts to the Edmond Market.

- g. Project Reference
  - i. Janet Yowell or Toni Weinmeister
  - ii. (405) 340-0116
  - iii. [jy@eeda.com](mailto:jy@eeda.com) / [tw@eeda.com](mailto:tw@eeda.com)

3. Foley, AL

- a. Project Name: Foley, AL Partnership
- b. Project Location: Foley, AL
- c. Project Start Date: October 2011
- d. Project Completion Date: Ongoing
- e. Project Total Cost: Confidential
- f. Project Overview Summary: Retail Strategies has assisted the City of Foley with custom research on specific retail categories to attract new retailers to the market. Retail Strategies has assisted in the recruitment of PetSense, Hobby Lobby, Big Lots, Academy Sports and Foosackly's to the market.
- g. Project Reference
  - i. Jeff Rouzie
  - ii. (251) 971-1467
  - iii. [jrouzie@cityoffoley.org](mailto:jrouzie@cityoffoley.org)



# METHODOLOGY AND APPROACH



## PROJECT APPROACH

The project will be overseen by the Principals of Retail Strategies, the Executive Vice President, Wade Robinette and the Client Manager for the State of Florida, Lauren Turriglio, with support from our research team and retail recruitment staff. This combination of the Retail Strategies' team, utilizing each team member's individual skill set, will create the synergy needed to develop a successful retail recruitment initiative in Lake Worth, FL.

The Lake Worth CRA will be asked to provide the following:

- A project lead to whom Retail Strategies will provide information and updates on our progress. This person should also be the client representative responsible for requesting on-demand research as well as disseminate information to local stakeholders as appropriate.
- A point person to access BaseCamp where all research, analysis, marketing materials, the strategic plan and progress reports are made available to the client.
- Images and information to be used in the materials developed by Retail Strategies to market Lake Worth opportunities for new retail.
- Assist Retail Strategies with contact information of property owners whose property is identified as a "Key Site" for retail/shopping center development or redevelopment
- Provide traffic counts for intersections and streets if available from the local planning or transportation department.
- Completed Questionnaires regarding the past and current retail landscape and communities expectations.

## Project Timeline

- Contract Signed/Service Start Date: Day 1
- BaseCamp Account Invitation Sent for Primary Contact: Day 1
- Client Manager contacts client, welcomes them to Retail Strategies, provides Getting Started Documents and Basecamp access: Day 1
- Getting Started Research: Day 10
- Aerials of Client Community: Day 15
- Getting Started Documents Uploaded to BaseCamp (Completed by Client): Day 30
- Custom Research and GAP Summary: Day 30
- In Market Analysis: Day: 30-75
- Prospect List Complete for Strategic Plan: Day 60
- Recruitment Objectives, BOG Results/Aerials & Focus Properties Submitted by Day 75
- Marketing Guide: Day 75
- Strategic Plan Due for Final Review: Day 80
- Strategic Plan Presentation Scheduled with Client: Day 90



## **RESEARCH: QUANTITATIVE AND IN-MARKET ANALYSIS**

Our research solutions are not a “one size fits all” or pre-formatted by an industry standard radius or drive-time area. Each city, community, or retail trade area requires unique analysis based on numerous factors including natural boundary areas, current retail tenant mix, travel times, radius areas and existing sites/buildings. Our research focuses on identifying the data points that are most likely to influence the site location decisions of retailers. Once these data points are determined – we provide thematic maps, aerial photos, asset maps, and customized research reports by retail concept.

### **a. Conduct and Deliver Market Research to Include:**

- Timeline: Begins Day 1 and initial research is completed within the first ten days of our engagement. Further research and analysis will be complete prior to the Strategic Plan delivery. Research updates, site specific research and on-demand research continue throughout the engagement.
- Identify Lake Worth, FL Retail Trade Areas using political boundaries, drive times and radii and custom boundary geographies
- Perform Market & Retail GAP Analysis for each trade area (Leakage and Surplus)
- Provide Consumer Attitude and Behavior Analysis
- Conduct Retail Peer Market Analysis
- Competition analysis between Lake Worth, FL trade area(s) and surrounding competitive communities
- Cannibalization Analysis (Distance Tolerance) for all recommended retail prospects between nearest existing locations and Lake Worth, FL
- Tapestry Lifestyles – Psychographic Profile of Trade Area / Market Segmentation Analysis
- Thematic Mapping and Aerial Imagery by trade area
- Retail Competitor Mapping/Analysis
- Market Maximization Summary and Strategic Leasing Plan
- Analysis of future retail space requirements in relation to the retail market analysis, the market's growth potential and trends in the retail industry
- Identification of Retail Prospects to be targeted for recruitment
- Retailer Recruitment and Execution of the Retail Strategic Plan
- Updates on Retail Industry Trends
- Custom On-Demand Demographic Research – Historical, Current, and Projected Demographics – to include market trade areas by radius/drive-time, and custom trade areas associated with Lake Worth, FL





**b. In-Market Assessment of Real Estate Assets:**

- Timeline: Market visit is scheduled on Day 1 of the project and completed no later than 75 days in to the engagement.
- Identify/Evaluate/Catalog Priority Commercial Properties for Development, Re-development and higher and best use opportunities (this includes Dixie Highway, the Gateways, Federal Highway, and Lake and Lucerne Avenue Corridors)
- Identification of Priority Business Categories for Recruitment and/or Local Expansion
- Perform Competitive Analysis of Existing Shopping Centers and retail corridors

**c. Community and Stakeholders' Input:**

- Timeline: Retail Strategies Questionnaire is delivered on Day 1 of the project and should be completed by our primary contact and other stakeholders within the first 30 days of our engagement.

Our company values the input of Community Leaders and Stakeholders. The Questionnaire identifies and asks for input on subjects ranging from "What Retail is Being Desired in Lake Worth, FL" to "What Projects are on the Drawing Board in Lake Worth, FL." In addition to the Questionnaire our firm will continue to reach out and receive input from Community Leaders and Stakeholders throughout the life of our partnership.

**d. Project Management through BaseCamp:**

- Timeline: Basecamp account is established on Day 1 of the project and primary contacts receive instructions on setting login credentials and BASIC Training in order to upload information requested by Retail Strategies. Research Reports will be made available through Basecamp as initial research is completed.

Retail Strategies uses BaseCamp as our document and project management solution to provide access to all project deliverables and real time updates to the appropriate community contacts.

Basecamp is a two way project management solution allowing our clients the ability to upload information to the Retail Strategies team, set alerts, create to do lists, and much more. Retail Strategies also provides all pro-active recruiting updates to our clients through their Basecamp account.

The Client Manager for the Lake Worth, FL engagement will also upload any on demand research requests and updates of conversations with local property owners, commercial realtors and developers. All users designated by Lake Worth, FL will receive Basecamp training from Retail Strategies staff through a web meeting.



### **Development of Strategic Retail Recruitment Plan:**

#### **a. Develop Marketing Materials**

- Timeline: On or before Day 75 of our partnership Retail Strategies will develop marketing materials on the client's behalf.

The materials are created to market the community to retailers, developers, etc. These marketing materials become one of the "tools" used to position Lake Worth, FL as destination for new retail development.

#### **b. Provide Identification and Recommendation of Retail Prospects**

- Timeline: On or before Day 75 Retail Strategies will develop a Retail Prospect List which will include retail prospects targeted for recruitment to Lake Worth, FL.

This list of retailers is based on the initial research and analysis – both quantitative and in-market – done on behalf of Lake Worth, FL. The Retail Prospect List is a dynamic document which is continuously updated based on real time conversations with both retailers and developers. As we represent Lake Worth, FL nationally, present opportunities in Lake Worth, FL to retailers and developers, and learn of newly announced retail expansion plans and concepts, the prospect list will be updated accordingly.

#### **c. Recommendations for Site Locations for Retail/Restaurant Companies**

- Timeline: On or before day 80 of our partnership Retail Strategies, LLC will identify and prioritize commercial properties that may be suitable sites to present to prospective new retailers.

This process will include maps, marked aerials, and all pertinent contact and site specific Information relative to each site.

#### **d. Provide a Recruitment Strategy for New Retail and Restaurant Companies**

- Timeline: On or before day 80 of our partnership, Retail Strategies will develop a Strategic Retail Recruitment Plan.

The Strategic Retail Recruitment Plan which will be a summary of the primary retail gaps inclusive of the key retail and restaurant concepts to be pursued with an overview of each retailer relative to size, economics, etc. The Strategic Plan will identify both short-term and long-term recruitment objectives and goals.

### **Delivery of Strategic Retail Recruitment Plan**

- Timeline: By Day 90 of our Partnership the Client Manager for the partnership will schedule a convenient time to present the Strategic Retail Recruitment Plan to the client.





The Retail Recruitment Strategic Plan will be presented to the Stakeholders and Primary Contact(s) within Lake Worth, FL. Once the Retail Recruitment Strategic Plan has been presented and approved by the Lake Worth CRA it will be uploaded to client's BaseCamp account.

**Execution of Customized Strategic Retail Recruitment Plan:**

- Timeline: After the presentation of the Strategic Retail Recruitment Plan and approval by the Lake Worth CRA, Retail Strategies begins executing against Retail, Development, and Redevelopment opportunities within Lake Worth, FL. Pro-Active recruitment continues for the length of the engagement.

Retail Strategies will implement the Strategic Retail Recruitment Plan, after presentation and approval by the Lake Worth CRA, by establishing relationships and facilitating conversations with key leaders/stakeholders in Lake Worth, FL including property owners, developers, investors and real estate professionals along with prospective retail/restaurant companies in order to execute the Strategic Retail Recruitment Plan. In addition to facilitating relationships between key entities Retail Strategies will represent Lake Worth, FL on a National scale at Retail/Real Estate Conferences, including the International Council of Shopping Centers (ICSC) Global Real Estate Convention and regional Deal Making events, leveraging marketing materials, identifying sites for targeted retailers, and setting meetings with targeted retailers/developers to discuss opportunities within Lake Worth, FL.

Retail Strategies will also update the Strategic Retail Recruitment Prospect List as we identify new and expanding/emerging retail/restaurant companies. The Lake Worth CRA will be updated on our progress through their BaseCamp account and communication between Retail Strategies and the designated contact at the Lake Worth CRA.

**Portfolio Review**

A prime example of the creativity that drives Retail Strategies is our Portfolio Review program. Due to the number of engaged cities we work with, we have identified retailers and developers looking to aggressively expand their market presence regionally and nationally. We understand the parameters set by retailers when reviewing potential new locations. We have a roster of developers who are looking to replicate previous developments in similar communities across appropriate geographic regions. Retail Strategies meets with these retailers and developers in a variety of settings – corporately, regionally, at ICSC functions or in their offices – to position opportunities across our engaged city portfolio down to the specific sites meeting their criteria. Extensive analysis and preparation prior to the Portfolio Review allow meetings to focus on deal making in addition to exchanging information. Retailers and developers have told us that this is the most productive use of their time and their preferred way to discuss opportunities and negotiate deals.



### **Call List and Recruitment Update**

- Timeline: Updated Monthly, this document is an ongoing tracking form to keep the identified contacts updated relative to recruitment efforts and specific interaction with prospective retailers and developers interested in the Lake Worth, FL retail trade area. Updates are posted to Basecamp and the appropriate contacts receive an email notification that an update has been added for their review.

### **Representation at Retail Industry Events**

- Timeline: Will begin May 17<sup>th</sup> at ICSC RECON in Las Vegas, NV and continue at each regional and National retail real estate conference throughout the life of our partnership with Lake Worth, FL

Upon completion of the research assessment, our team then focuses on the primary benefit of our approach, implementation. Without a robust retail recruitment strategic plan, and the associated outreach to retailers and developers, even the best research is wasted. City Staff and Elected Officials have many demands on their time and talents creating obstacles to truly dedicating themselves to retail recruitment, while Retail Strategies will become an extension to your staff providing the focus, expertise, and relationships necessary to develop and execute a successful recruitment process.

Once the retail recruitment strategic plan has been adopted, Retail Strategies puts its years of retail real estate experience – and a national network of retail, restaurant and developer contacts – to work on your behalf. Retail recruitment is a commercial real estate activity and, as such, requires all of the aforementioned elements in order to yield results. Retail Strategies will embark upon a sustained, aggressive recruitment campaign on behalf of Lake Worth, FL. We become an extension of the staff that you don't have and are laser-focused on growing your retail base.

In 2013 Retail Strategies attended twenty-two (22) retail industry conferences and trade shows (including the International Council of Shopping Centers, Retail Live, Retailer One on One) each of which is an opportunity for us to position our client communities and the opportunities within each market respectively for retail growth. In 2014 Retail Strategies increased that number to more than thirty (30) to further represent and position our clients to expanding retailers and developers executing against each markets Strategic Recruitment Plan. In 2015 our team will attend more than thirty (30) conferences to further represent and position our clients to expanding retailers and developers executing against each markets Strategic retail Recruitment Plan.





Below is an image of our booth for ICSC RECON 2015 in Las Vegas, NV.



# OPTIONAL SERVICES



## Incentives Consulting

Retail development in today's market, while improving from the downturn which occurred largely between 2008 and 2011, requires cooperation from all parties involved. Many recent retail projects illustrate how mutual partnerships between the retailers, developers and municipalities can result in WIN-WIN scenarios for all involved. Economic development partnerships between cities seeking new goods and services and increased tax revenues, developers looking for new investment opportunities and retailers looking to grow in new markets which were not economically feasible in the past, are now happening thru collaborative efforts.

In the past, when development economics didn't work, developers and retailers chose to move on to the next opportunity. However, success is now being realized in communities previously overlooked due to the creative and economically feasible alternatives municipalities can bring to the table.

Today, we believe the municipality needs to have a "seat" at the table initially in all new or re-development projects in their community. By making the municipality a "partner" in the development discussion, opportunities for creative assistance to bridge economic gaps can become "deal makers" versus "deal breakers".

Each municipality in each state differs in the capability and methodology for providing assistance. Many development agreement alternatives exist to "bridge the gap" and address the funding shortfalls to create successful developments. Some of these include Development Agreements in which the municipality uses funds from reserves or bond issues to assist with site infrastructure or similar improvements (from which sales or property tax increases are used as repayment along with alternatives for developer guaranty obligations), sales tax incentives (typically thru revenue sharing in some fashion with the developer or retailer) or joint developments in which the City contributes city-owned property such as parking facilities or other public infrastructure to help mitigate shortfalls in development funds.

Municipalities realize a positive return on investment by providing methods to create development in their communities – plus job growth, higher property taxes, a broader tenant mix and ultimately, and additional tax revenues to fund quality of life projects throughout the community. Developers now have a better understanding of what options are available to turn what were previously considered economically prohibitive deals into viable new development projects. By creating a partnership with the municipality from the inception of a deal, more opportunities exist for new and exciting retail developments to occur.



**Pricing for Incentives is based on when Retail Strategies becomes engaged in the process.**

If Retail Strategies is engaged prior to an incentives request from a developer, retailer or third party and the city request assistance from Retail Strategies to research, analyze and/or negotiate the requested incentives package, the cost to the city is \$15,000 plus 4% of the negotiated incentives value per project. The percentage fee is paid over the length of the incentives payback period.

If Retail Strategies is engaged after a project has made an incentives request, the cost to the city is 8% of the cost savings recognized by the city per project paid over the length of the incentives payback period.

**Custom Marketing Materials for Property Owners & Commercial Real Estate Firms**

Negotiated per request

**Meeting Requests outside the Scope of Services**

Reimbursement of Travel Expenses





## INVESTMENT

### Initial Engagement: Year 1

**\$50,000**

- Research Quantitative and In-Market Assessment of Real Estate Assets
- Access to BaseCamp
- Development Retail Recruitment Strategic Plan
  - Recruitment Strategy for New Retail and Restaurant Companies
  - Provide Identification and Recommendation of Retail Prospects
  - Recommendation of Site Locations for Retail/Restaurant Concepts
  - Development of Marketing Materials
  - Call List and Recruitment Updates
- Execution of Strategic Recruitment Plan
  - Working with local property owners, developers and real estate professionals in order to facilitate retail growth, including On Demand Research/Analysis
  - Outreach to retail prospects with continuous updating of Retail Prospect List
  - Monthly Call List and Recruitment Updates
  - Representation at national and regional retail real estate conferences

### Pricing – Years 2 and 3 Renewals

**\$30,000 per year**

Retail Strategies, for year two and three of the engagement, will provide updated research and continue on-demand research reports/analysis, plus:

- Updating of Strategic Retail Recruitment Plan
- Updating of Retail Prospect List
- Representation at national and regional retail real estate conferences

### Pricing – Years 4 and Beyond

**\$30,000 per year**

Retail Strategies, for years four and beyond, will provide updated research and continue on-demand research reports/analysis, plus:

- Updating of Strategic Retail Recruitment Plan
- Updating of Retail Prospect List
- Representation at national and regional retail real estate conferences

review the proposals and rank them according to the point system explained above. The evaluation committee will then make a formal recommendation to the CRA Board for approval.

**PROPOSER INFORMATION PAGE**

Company Name: Retail Strategies

Authorized  
Signature:



Signature

Robert Jolly

Print Name

Title: Partner

Physical  
Address:

120 18th Street South, Suite 201

Street

Birmingham

City

AL

State

35233

Zip Code

Telephone: (205) 490-2825 Fax: (205) 313-3677

Email Address: Robert@retailstrategies.com

Web Site: www.retailstrategies.com

Federal Identification Number: 45-3477728

**This is a requirement of every Proposer.**

### CONFIRMATION OF DRUG-FREE WORKPLACE

In accordance with Section 287.087, Florida Statutes, whenever two or more proposals are equal with respect to price, quality, and service which are received by any political subdivision for the procurement of commodities or contractual services, a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

(1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

(2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

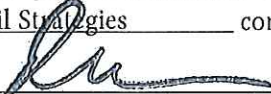
(3) Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in subsection (1).

(4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 5 days after such conviction.

(5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.

(6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign this statement on behalf of Retail Strategies, I certify that Retail Strategies complies fully with the above requirements.

  
Authorized Representative's Signature

3/23/2015  
Date

Robert Jolly  
Name:

Partner  
Position:

**\*\* If this form is not returned, the City/CRA will assume the Proposer has not implemented a drug-free workplace program. This is a requirement of every proposer.**





RETAIL STRATEGIES RFP RESPONSE:

# LAKE WORTH CRA

RETAIL FEASIBILITY, STRATEGIC PLANNING AND BUSINESS RECRUITMENT

MARCH 27, 2015

PREPARED BY:  
MATTHEW PETRO  
BUSINESS DEVELOPMENT AND CLIENT MANAGEMENT  
RETAIL STRATEGIES, LLC  
BIRMINGHAM, AL

**STRICTLY PRIVATE  
AND CONFIDENTIAL**

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## EXHIBIT "C"

### SCOPE OF SERVICES

#### 1. Development of Strategic Retail Recruitment Plan:

##### a. Develop Marketing Materials

Timeline: On or before Day 75 of our partnership Retail Strategies will develop marketing materials on the client's behalf. The materials are created to market the community to retailers, developers, etc. These marketing materials become one of the "tools" used to position Lake Worth, FL as destination for new retail development.

##### b. Provide Identification and Recommendation of Retail Prospects

Timeline: On or before Day 75 Retail Strategies will develop a Retail Prospect List which will include retail prospects targeted for recruitment to Lake Worth, FL. This list of retailers is based on the initial research and analysis – both quantitative and in-market - done on behalf of Lake Worth, FL. The Retail Prospect List is a dynamic document which is continuously updated based on real time conversations with both retailers and developers. As we represent Lake Worth, FL nationally, present opportunities in Lake Worth, FL to retailers and developers, and learn of newly announced retail expansion plans and concepts, the prospect list will be updated accordingly.

##### c. Recommendations for Site Locations for Retail/Restaurant Companies

Timeline: On or before day 80 of our partnership Retail Strategies, LLC will identify and prioritize commercial properties that may be suitable sites to present to prospective new retailers. This process will include maps, marked aerials, and all pertinent contact and site specific information relative to each site.

##### d. Provide a Recruitment Strategy for New Retail and Restaurant Companies

Timeline: On or before day 80 of our partnership, Retail Strategies will develop a Strategic Retail Recruitment Plan. The Strategic Retail Recruitment Plan which will be a summary of the primary retail gaps inclusive of the key retail and restaurant concepts to be pursued with an overview of each retailer relative to size, economics, etc. The Strategic Plan will identify both short term and long-term recruitment objectives and goals.

#### 2. Delivery of Strategic Retail Recruitment Plan

Timeline: By Day 90 of our Partnership the Client Manager for the partnership will schedule a convenient time to present the Strategic Retail Recruitment Plan to the client. The Retail Recruitment Strategic Plan will be presented to the Stakeholders and Primary Contact(s) within Lake Worth, FL. Once the Retail Recruitment Strategic Plan has been presented and approved by the Lake Worth CRA it will be uploaded to client's BaseCamp account.