

Regular Workshop – January 22, 2013
Agenda Item 8

Agenda Item: Discussion Regarding Selection of Planning Consultant

Presenter: Town Manager

Summary: On December 10, 2012 two firms were interviewed for Planning Services for the Town's long-range planning needs, as well as amendments to the Zoning Code and Comprehensive Plan . Staff has continued discussion with both firms to determine if a contract can be reached that addresses the Town's needs. The Town Manager will discuss this effort and seek Commission direction on how to proceed in selection of a Planning Consultant.

Attachments: 1-16-13 Memo, Manager to Commission.

**Recommended
Action:** Pending discussion, provide direction to Manager.

M E M O R A N D U M

Date: January 16, 2013

TO: Town Commission
FROM: Dave Bullock, Town Manager
SUBJECT: Discussion Regarding Selection of Planning Consultant

On December 10, 2012 two firms were interviewed for Planning Services for the Town's long-range planning needs, as well as amendments to the Zoning Code and Comprehensive Plan .

Staff has continued discussion with both firms to determine if a contract can be reached that addresses the Town's needs.

At the January 22, 2013 Regular Workshop Meeting the Town Manager will discuss this effort and seek Commission direction on how to proceed in selection of a Planning Consultant.

Please feel free to contact me if you have any questions.

M E M O R A N D U M

TO: David Bullock, Town Manager

FROM: Robin D. Meyer, AICP, Director
Planning, Zoning and Building Department

SUBJECT: Evaluation of Planning Request For Proposals Finalist

The Town advertised a Request for Proposals (RFP) for consulting planning services relative to preparation of changes to the Town of Longboat Key Comprehensive Plan and Zoning Code. The RFP was advertised in August 2012 with a response deadline of September 12, 2012. The Town received responses from six firms of which two were shortlisted for further interview. The Town review team was made up of three Town staff, the Planning Commission Chair, and the Planning Director of Manatee County.

The two shortlisted firms selected were Strategic Planning Group, Inc. (SPG) and ACP Visioning + Planning, Ltd. (ACP). On December 11, 2012, the two firms made presentations and responded to interview questions from the review team. That same day the review team evaluated the two presentations, the previously received proposals, and the firm's answers to presented questions. The review team agreed that SPG had a better grasp on the services Longboat is requesting and therefore is the better firm to provide those services.

On December 17, 2012, the Town received an amendment to the ACP proposal. Evidently the firm inadvertently excluded two pages in their written proposal. The pages provided information regarding their Land Use & Zoning task along with a \$60,000 estimate for that task work.

Both of the shortlisted firms have apparent strengths and weaknesses. Town Staff has concerns regarding both consultants and their proposals/interviews. In order to allow the two firms to address Staff concerns, the Town sent each firm an email requesting additional information and clarification. Copies of the emails sent and responses received are attached.

The RFP process allows for the interested firms to be evaluated on a predefined set of criteria. Cost proposed by the interested firms is one of the evaluation criteria. However, the proposed cost is not necessarily the final cost. The firm awarded the project will go through a negotiation process with Town Staff. The proposed cost does give an idea of what the firm feels the proposed scope will require. The following details the costs proposed by the two shortlisted firms:

Comparison of Proposed Costs

Strategic Planning Group, Inc.	\$84,800.00
ACP Visioning + Planning	\$200,000.00
December 17, 2012 Addendum	<u>\$60,000.00</u>
ACP Total	\$260,000.00

The following sections present some of the strengths and weaknesses that were observed by the Town review team. These were utilized in the initial review and award recommendation of the RFP.

SPG

SPG provided a good written proposal with a decent graphic presentation. They did not provide a clear layout of a proposed schedule. The oral presentation from SPG was geared to Longboat Key. They provided a clear direction for identifying the future needs for commercial and tourism uses through market analysis and demand. They also had a clear understanding of the need to bring the Comprehensive Plan and Zoning Changes forward as a package. They present a lot of local knowledge, but will that influence a "fresh perspective" to Longboat Key. The main team member offices are close in proximity to Longboat Key. Question/Answer session was good and reflected knowledge of local issues. Project Manager is well spoken and communicates answers well. Team's resume shows more experience in working with upscale communities such as Longboat Key. Although they had an understanding of the need, SPG's responses to the preparation of changes to the Town of Longboat Key Comprehensive Plan and Zoning Code were vague and the Planning Team member responsible for this element never participated in the discussion nor is the proposals clear on how they will develop these elements.

ACP

The ACP written proposal was the highest ranked by the review team. The proposed scope of work in the written proposal was concise and comprehensive. Proposal graphics are high quality – can expect reports to have good visual presentation. The team members have extensive experience in similar projects. The oral presentation from ACP was generic unlike their written proposal. They did not transfer specific Longboat Key information from the written proposal to the oral presentation. They were vague on how they were going to coordinate the different parts of the plan and bring everything together for adoption. The ACP oral presentation focused on marketing the Town to outsiders as opposed to researching the current market of the Town. The ACP team did not display any knowledge, detail, or research of Longboat Key. The ACP team does bring a nationwide experience and perspective. Scheduling the ACP presentation was problematic due to the team's availability. Scheduling issues may be pervasive for the ACP team throughout the project.

Recommendation

While the Town review team felt that both groups would provide quality work and products through implementation phase, it was the consensus of the review team that SPG provided a better overall combination of written proposal presentation and interview.

xc: Anne Ross, Assistant Town Manager
David Persson, Town Attorney
Robin D. Meyer, AICP, Director – Planning, Building & Zoning Department

To: bgray@spginc.org
Cc: Dave Bullock; Rita Mazza; Steve Schield
Subject: Longboat Key RFP Process

Bob, I wanted to thank you for your proposal and presentation and follow up on the Town of Longboat Key RFP process, we are still considering both teams but have questions for each. The review panel felt your presentation was stronger than your written proposal, there were concerns regarding the quality of the work sent in your proposal. Our main concern with your presentation was a general perception that the process would not be unique to Longboat Key or but more of a canned approach. Obviously it is very important that the process for developing the Comprehensive Plan changes and accompanying Zoning Code language is developed through a process that will be unique to Longboat. Can you address this, by providing more detail as to how you propose to gear this process be a Longboat Process? Thank you for your time and patients.

Robin D. Meyer, AICP
Planning, Zoning and Building Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228-3124
rmeyer@longboatkey.org
941-685-9986 (cell)
941-316-1966 Ext. 284 (Office)



Strategic Planning Group, Inc.
Economics • Planning • Development Consultants
USA, Jamaica, Guam, Virgin Islands

Robert J. Gray, Chairman & President
rgray@spginc.org

January 5, 2013

Robin D. Meyer, AICP
Planning, Zoning and Building Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228-3124

Dear Mr. Meyer:

Thank you for the opportunity to address your December 28, 2012 email; specifically, our approach to ensure that the planning process is a "Longboat Process." As mentioned in our presentation and submittal, Strategic Planning Group, Inc. (SPG) was founded on the belief that planning must be based on sound economic and market principles and requires informed stakeholder involvement throughout the entire planning and implementation process. In SPG's 30 years of practice and my 41 years of experience, we know that if the planning process is not perceived by the stakeholders as "their plan" the chance of success is limited. There is no special formula or magic bullet for a community to reach or maintain its desired character. It is very much market driven. The Town's planning effort needs to demonstrate the "3 Cs" of planning – Concise, Consistent, and Clear. Through a concise, consistent, and clear regulatory scheme the market is able to better respond to the demand and evolve a more organic community form as opposed to a community form that is created by overly regulatory directives. It is for that reason that our team has evolved a very positive and extremely successful public involvement process.

While the Town of Longboat Key has recently received a negative court ruling, the timing is advantageous to update its Comprehensive Plan. A lot has changed at the State and local level regarding Comprehensive Planning. The current Town's Comprehensive Plan was adopted in 2007 at the height of the Housing Bubble. It was also the height of the State's top-down approach for local comprehensive plans. Under current growth management legislation, the Town's current Comprehensive Plan can be significantly streamlined and focused to the issues that are truly important locally, while still addressing State significant issues (i.e. coastal management, hurricane evacuation, workforce housing, etc.).

Longboat Key is unique in numerous ways including its geographic configuration as a long and narrow island; its high socio-economic profile and its seasonality. SPG understands that the Town's politics are dominated by a citizenry and elected officials who have wealth, are well educated, informed,



retired business leaders and professionals with no shortage of opinions and “will”. The citizens must be engaged in the comprehensive plan restructuring process in order to build a consensus for a referendum to revise the plan and LDRs. The basis for a consensus is based on a common understanding of the market conditions that currently exist and as well as those projected. In short, input is needed from an informed public. Our planning process including our proposed public participation process is formulated on the use of focus groups, workshops/charrettes and surveys.

The Public Participation Process

The Public Participation Process is based on three rounds of stakeholder/public involvement.

Phase One: Finalize Public Participation Process

During this Phase, SPG will meet with the Planning Staff to finalize the Public Participation program and to identify key stakeholders to interview and/or to participate in focus groups and participate in future workshops/charrettes.

Task One. Finalize the public participation process including: key stakeholders to interview; defining the number of specialized focus groups and recommended attendees; place and timing of charrettes/workshops and Public Hearing. The use of web based surveys will be discussed and if desired, logistics and content will be defined. An additional approach might be the creation of a CEO Round Table wherein the Town could reach out to the many CEOs who own condominiums (and have a wealth of knowledge and talent) to sit on the committee which could also act as a Steering Committee.

Phase Two: Initial Data and Issue Assessment

Phase Two is based on developing a detailed understanding of both objective and perceived issues (primary and secondary data sources) impacting the Key's existing socio-economic fabric and its short term trends.

Task One. Concurrent to the preparation of the various market studies; SPG proposes **individual meetings** with the Town's commissioners, key staff, and as well as business leaders, merchants, and homeowner associations. These meetings are to gather both data and issues facing Longboat Key today and over the next five years and longer (i.e. 2015), not to present data. We anticipate interviewing approximately 25 individuals.

Task Two. SPG proposes to hold three rounds of focus groups (each numbering up to 20 participants) comprising:

- Business leaders which include office, retail land owners and merchants
- Hospitality industry and resorts stakeholders
- Key homeowner association delegates



- Web based Public survey.

These focus group meetings last between one and two hours each and can be completed in one or two consecutive days. The focus groups will be moderated by seasoned professionals with 20+ years experience, most with 30+ years of experience.

Task Three. SPG will participate in a charrette/workshop to present the initial findings from the preceding tasks of the Public participation. Prior to the workshop, SPG also will prepare and distribute an Economic/Market Profile of Longboat Key in order to provide a common base of information on the Key for an educated discussion the future of the Town. The Economic/Market Profile is a critical part of the planning process especially given the fact that this comprehensive planning effort is largely redevelopment planning. SPG recommends that findings from Phase Two and the Socio-Economic Profile be made available to the public using the Town's webpage. Most of the topic questions addressed within the RFP will have been addressed during this effort.

Phase Three: Alternative Development/Regulatory Concepts

Phase Three, the second round of public participation process, involves a repeat of the same participants as Phase Two but can be expanded based on the result of Phase Two. SPG will work with stakeholders to develop up to three concept land use plans using visualization programs including graphic illustrations of various alternative concepts. Illustrative graphic visualizing is very effective in presenting alternative concept plans, especially in redevelopment planning and planning involving form base land use principals

Phase Four: Third Round of the Public Participation Program

Phase Four will be the third round of the Public Participation process, and will focus on developing consensus on a final draft Vision of the Key for the next 10+ years. Once a consensus has been achieved, SPG will review the Key's land development regulations for conflicts and make recommendations.

Phase Five: Finalize and Approve the Study's Findings

The draft findings will be presented to the Commission in workshop format. SPG is also available to present the findings in the form of a "Role-Out Event" in addition to the Public Hearing.

As mentioned, Longboat Key appears to have a very active and informed citizenry which we proposed to use extensively in our planning process. I hope that this letter answers your question on our Public Participation Process and demonstrates SPG's Core Belief:

At the heart of all our studies is the belief that, in order to succeed, planning must be based on sound economic and market principles



and have solid stakeholder involvement throughout the entire planning and implementation process.

The Basis for Consensus is based on a common understanding of the market conditions that currently exist as well as those projected. In short, input is needed from an informed public.

We look forward to the opportunity to work with you. Please do not hesitate to call or email if you have any further questions.

Sincerely,
Strategic Planning Group, Inc.

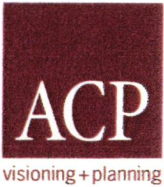
Robert J. Gray, AICP
President

pd:proposal.2012

To: glongo@acp-planning.com
Cc: Dave Bullock; Rita Mazza; Steve Schield
Subject: Longboat Key RFP Process

Gianni, , I wanted to thank you for your proposal and presentation and follow up on the Town of Longboat Key RFP process, we are still considering both teams but have questions for each. The review team felt that your proposal was stronger than the oral presentation. We also feel that your overall approach focuses to much on marketing, it was our intent that any market information should be used to understand how Longboat Key does or does not fit into today's and future markets and Comprehensive and Zoning Code changes needed to meet those markets. We are not interested in actual marketing of the different elements of the RFP. The Panel also felt your presentation was vague as to how you were going to coordinate the different parts of the plan and bring everything together for adoption. The other critic was that in the answer and question segment the responses were not geared towards Longboat Key detail or knowledge. Finally your budget is substantially higher than the Town wants to spend we need you to provide us something that will come in at the \$100,000 range.

Robin D. Meyer, AICP
Planning, Zoning and Building Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228-3124
rmeyer@longboatkey.org
941-685-9986 (cell)
941-316-1966 Ext. 284 (Office)



January 10, 2013

Robin D. Meyer, AICP
Planning, Zoning and Building Director
Town of Longboat Key
501 Bay Isles Road
Longboat Key, FL 34228-3124

Via e-mail

Re: Scope overview and budget

Dear Mr. Meyer:

Following your email dated December 28, 2012 and a follow up phone call, I am writing this letter to outline a scope of services by the ACP team that is in line with the \$100,000 budget for the consultancy.

We believe that what is described below will enable the team to produce a high quality deliverables.

Using the same phases of our original response, I have provided a brief description of what we will do in each.

In **Phase 1: Preparation** we will meet with staff, tour the area, collect data and studies, and interview selected stakeholders.

In **Phase 2: Community Meetings** we will conduct five listening sessions, one for each of the five tasks. We will then review and reconcile the input from the public with the information gathered through the technical analysis. Where there are discrepancies we will address those discrepancies as part of the Community Choices Workshop. During the workshop we will conduct stakeholder meetings for each task feeding the information back to the team as team members prepare the plan.

In **Phase 3: Assessment** we will conduct an analysis of the key population data. For the tourism, residential, and commercial tasks analysis we will focus our effort to gain an understanding of how Longboat Key performs in today's and future markets in those areas. We will also review land development regulations and recommend changes where needed. For the marketing task we will rely on Sandy Hillman's knowledge of the area and use her in an advisory role.

In **Phase 4: Recommendations and Reporting** we will prepare an amendment package with strike-through and underlined text revisions for the Comprehensive Plan. The amendment package will also contain maps and images depicting the recommendations. We will also review other elements for consistency across topics. For the zoning recommendations, we will draft amendments based on a review of the chapter and relevant aspects of the project recommendations. Like the Comprehensive Plan, text revisions to the code will be provided in strike-through and underline format. A key containing explanatory text for the proposed revisions will accompany the proposed revisions.

The price for each phase will be as follows:

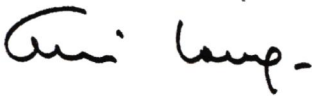
Preparation	\$ 7,000
Community Engagement	\$10,000
Assessment	
Residential	\$ 6,000
Tourism	\$ 6,000
Commercial	\$ 6,000
Marketing	\$ 2,500
Land Use and Zoning	\$45,000
Reporting	\$10,000
Expenses	\$ 7,500
Total	\$100,000

I hope this summary gives you what you need to make recommendations to the Town Commission.

We want to confirm that the team members listed in the RFP will be the ones working with you and the Town. We remain committed to give you a high quality plan.

Thank you again for keeping our team in consideration and we look forward to hearing from you.

Sincerely,



Gianni Longo
Principal

TOWN OF LONGBOAT KEY



PLANNING CONSULTANT REQUEST FOR PROPOSAL (RFP)

Town Commission

Workshop

January 22, 2013

TOWN OF LONGBOAT KEY



PLANNING CONSULTANT REQUEST FOR PROPOSAL (RFP)

- Advertised in August 2012 Nationwide through Demand Star Services
- Six Proposals Received September 12, 2012
- Two Firms Shortlisted: ACP and SPG
- Oral Presentations and Interviews December 11, 2012

TOWN OF LONGBOAT KEY



STRATEGIC PLANNING GROUP, INC. (SPG)

- Strengths
 - Oral Presentation Geared Towards LBK
 - Presented Knowledge and Research of Local Issues
 - Provided Clear Direction for Identifying Future Needs for Commercial and Tourism
 - Well Spoken and Communicates Answers Well
- Weaknesses
 - Proposal for Preparing and Accomplishing Comprehensive Plan and Zoning Code Changes was Vague
 - Unclear Whether They Will Bring a “Fresh Perspective”
 - Presentation and Proposal Material Only Adequate

TOWN OF LONGBOAT KEY



ACP VISIONING & PLANNING, LTD. (ACP)

- Strengths
 - Team Members are Highly Experienced
 - Nationwide Experience and Perspective
 - Presentation and Proposal Material High Quality
- Weaknesses
 - Proposal for Preparing and Accomplishing Comprehensive Plan and Zoning Code Changes was Vague
 - Provided No Knowledge and Research of Local Issues
 - Scheduling Issues

TOWN OF LONGBOAT KEY



COST COMPARISON

- Final Scope and Budget Negotiated with Awarded Firm – Proposal Provides Benchmark
- SPG Proposal = \$84,800
- ACP Proposal = (\$200,000 + \$60,000 = \$260,000)

TOWN OF LONGBOAT KEY



RECOMMENDATIONS

- Town Review Team Recommendation
 - SPG provided a Better Combination of Written Proposal and Oral Presentation.
- Town Manager Recommendation

REQUEST TO BE HEARD

Request is hereby made to be heard during the discussion of the following agenda item:

Date: 1/22/13 Agenda Item: 8

Subject: PLANNING

Name: (Please print legibly) Gene Jalesti

Address: 671 Cedar St.

*E-Mail Address (optional): _____

*Phone # (optional): _____

Please read the Pledge of Public Conduct and Town Code Section 30.06(E), Addressing the Commission, printed on the back of this form. **Give this request to the Town Clerk** for submission to the Mayor. The Mayor will call upon you to speak at the appropriate time.

***Note:** Under Florida law, e-mail address and phone number are considered public records when submitted to a government entity. If you do not want this information released in response to a public records request, you should not complete this section of this form. All written documents are also considered public records and open for inspection upon request.

declined to speak

REQUEST TO BE HEARD

Request is hereby made to be heard during the discussion of the following agenda item:

Date: 1-22-13 Agenda Item: 8

Subject: P+Z

Name: (Please print legibly) BS Webb

Address: _____

*E-Mail Address (optional): _____

*Phone # (optional): _____

Please read the Pledge of Public Conduct and Town Code Section 30.06(E), Addressing the Commission, printed on the back of this form. **Give this request to the Town Clerk** for submission to the Mayor. The Mayor will call upon you to speak at the appropriate time.

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REQUEST TO BE HEARD

Request is hereby made to be heard during the discussion of the following agenda item:

Date: 1/22/13 Agenda Item: 8

Subject: ~~Larry Grossman~~ Planning Consult

Name: (Please print legibly) Larry Grossman

Address: 763A St. Frost Drive North

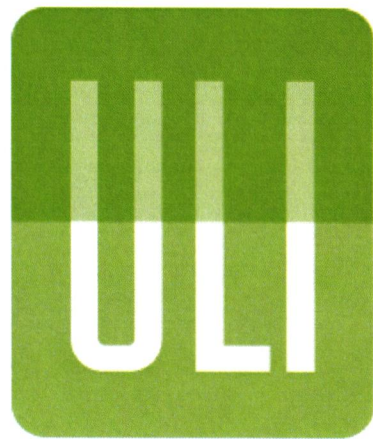
*E-Mail Address (optional): _____

*Phone # (optional): _____

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- **Non-profit research and education organization**
 - **30,000 members world-wide**
 - **We are land use and real estate professionals who share ideas, insights and best practices**

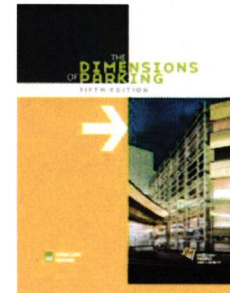
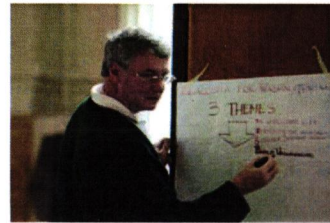
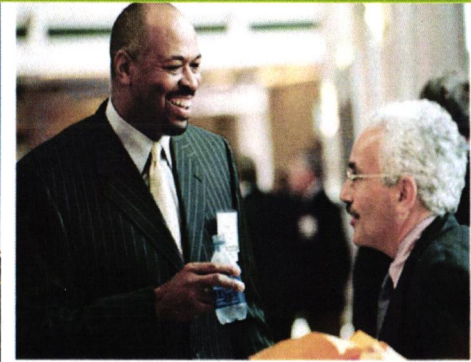


**Urban Land
Institute**

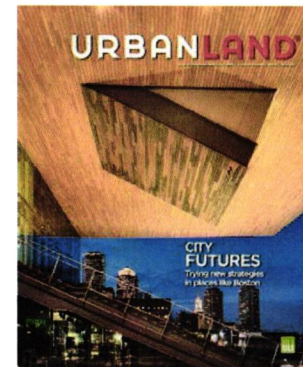
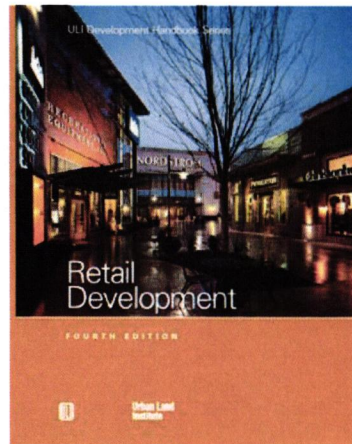


About ULI – What We Do

- Organize meetings and conferences
- Publish books and magazines
- Provide Education Programs
- Conduct Research
- Advisory Services

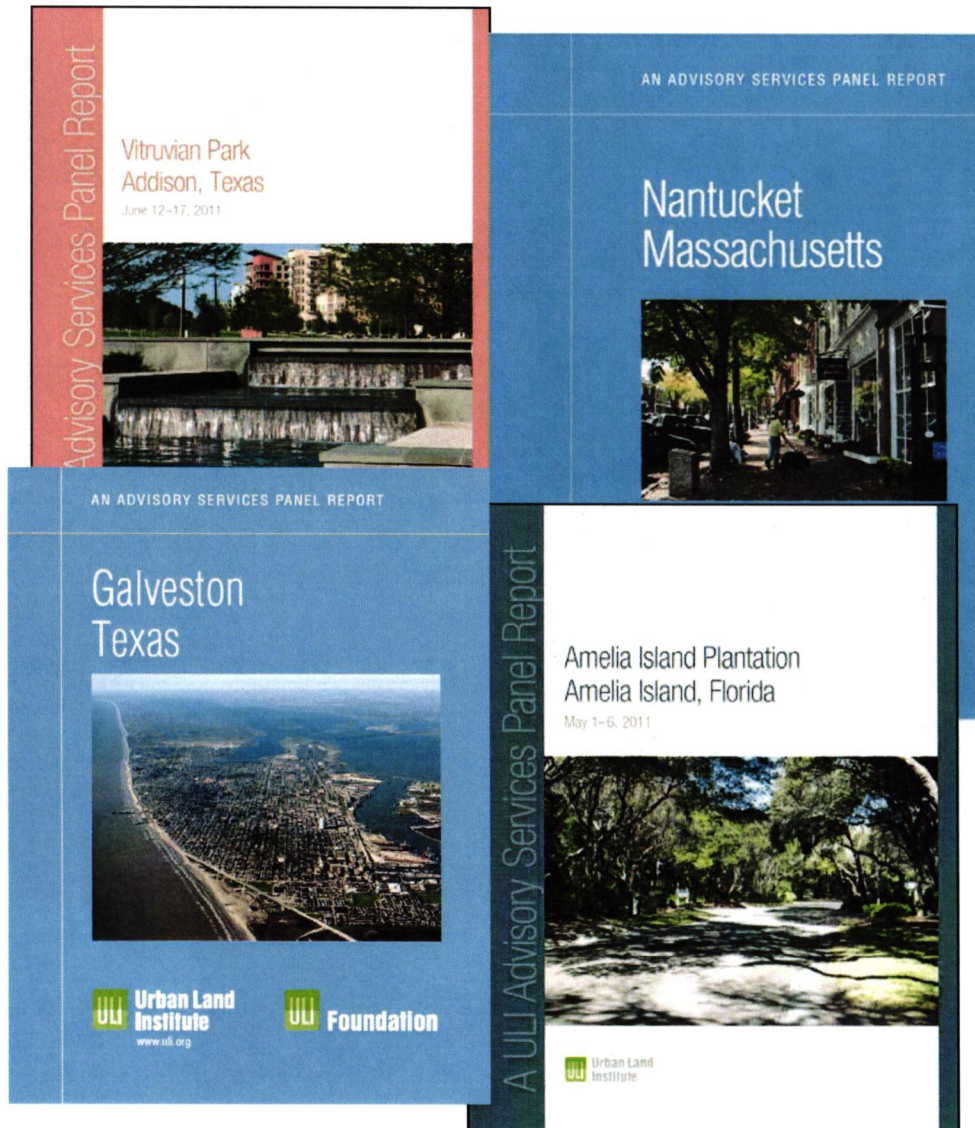


The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide



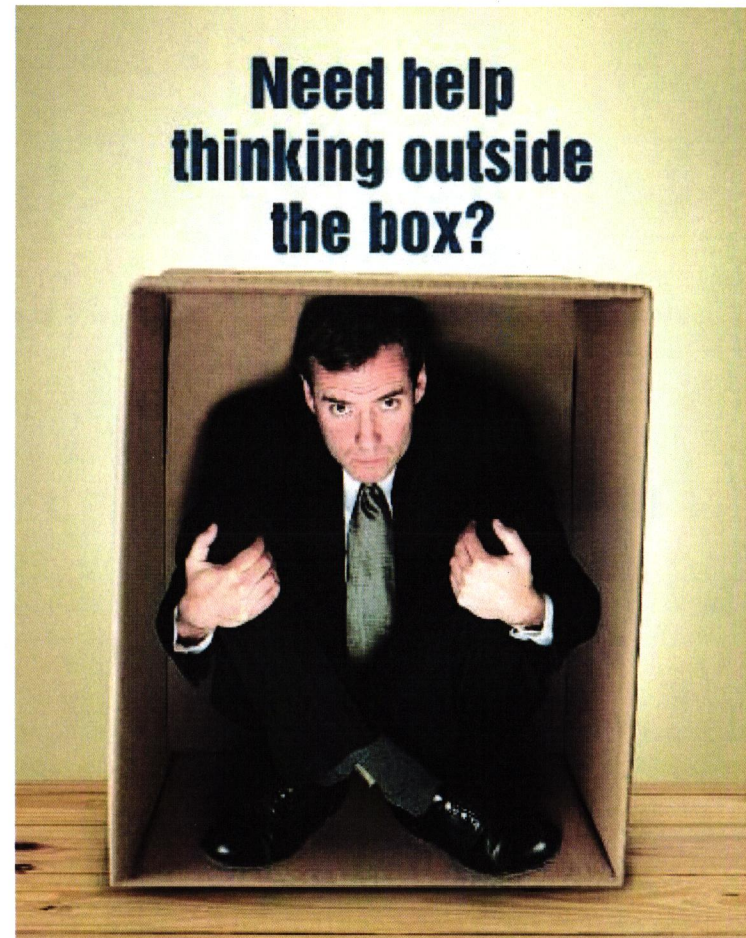
ULI Advisory Services

- Since 1947
- Over 600 Panels
- 15 to 20 Panels a Year



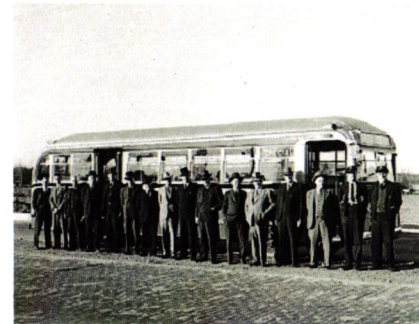
ULI Advisory Services

- Third Party
- Independent
- Multi-Disciplinary
- Strategic

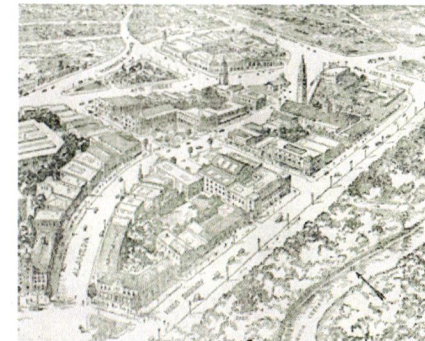
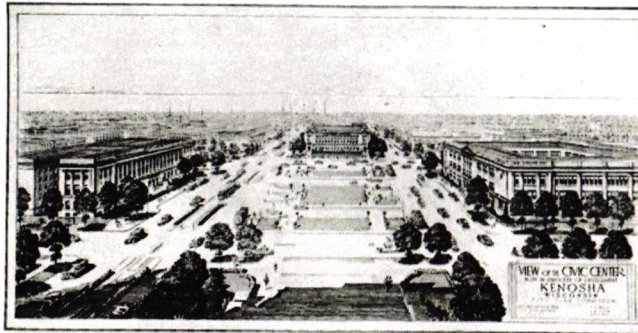
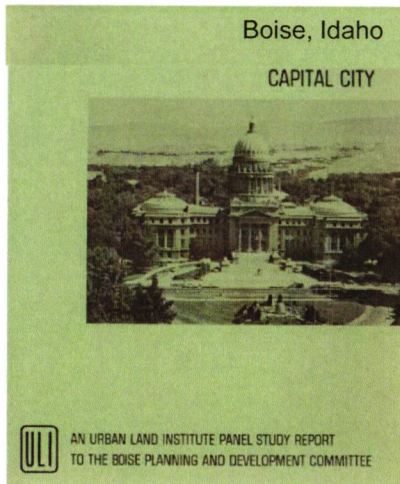


Panel Program History

- At every ULI Annual Meeting, members unrolled their plans for others to critique
- Developers, Mayors, City Managers, City Planners were looking for a independent, but experienced point of view
- 1947 ULI created a “for fee” service
- First Panel – Louisville, Kentucky



1940's and 1950's



1960's and 1970s



King Center

A Preliminary Evaluation of Land Use and Development

for the Watts Labor Community Action Committee
Los Angeles, California

A Panel Service Report by
ULI—the Urban Land Institute
1200 18th Street, N.W.
Washington, D.C. 20036

**Napa Valley Corporate Park
Napa, California**

An Evaluation of Development and Marketing Strategies

for
Bedford Properties

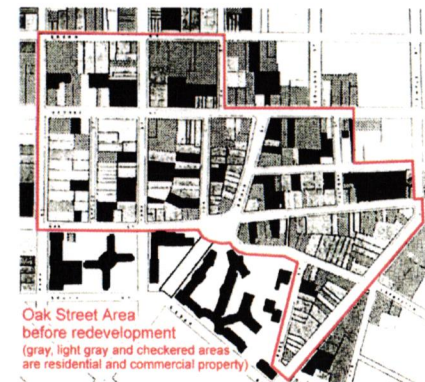
A Panel Advisory Service Report
ULI—the Urban Land Institute
1090 Vermont Avenue, N.W.
Washington, D.C. 20005

**Downtown Mall and
Peter Pond Hotel
Fort McMurray,
Alberta**

An Evaluation of Investment and Redevelopment Strategies

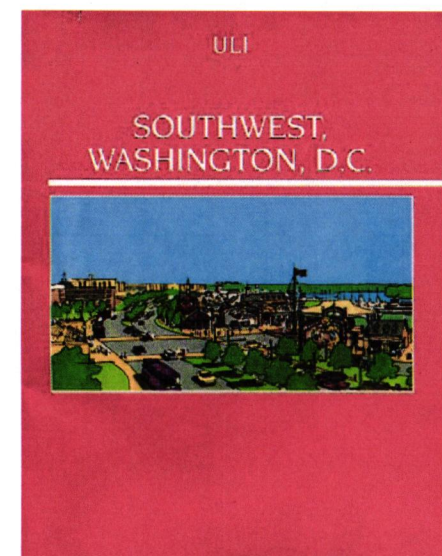
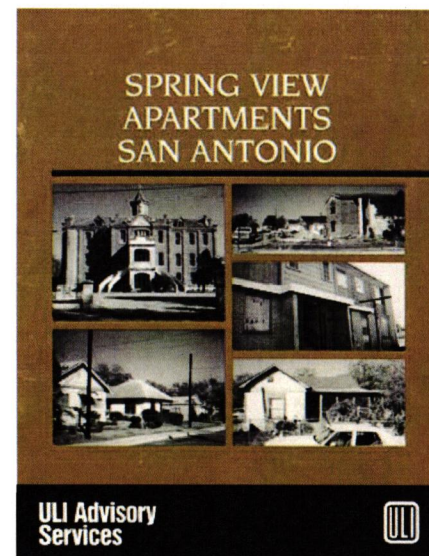
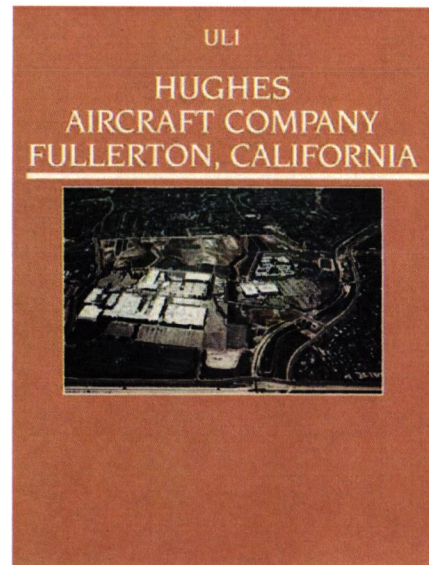
for
Carma Developers Ltd.

A Panel Advisory Service Report by
ULI—the Urban Land Institute
1090 Vermont Avenue, N.W.
Washington, D.C. 20005



1980's and 1990's

- Continued Diversification of Subject Matter
- More work with City, County and National Governments as Sponsors
- New Panel Types
 - Europe and Asia
 - Policy Workshops



Panel Logistics

- Panels take about 2 ½ to 3 months to organize
- Five day panels = 8 -10 panelists
- Developers, bankers, brokers, market analysts, architects, planners, public officials, and many other land use, design, finance and real estate experts
- The Panel Assignment is organized as a series of Questions that ULI can use to recruit the panelists



Sponsor Responsibilities

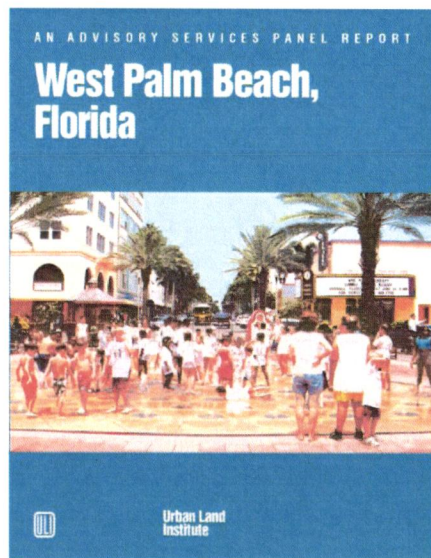
- Sign Contract
- Designate Liaison with ULI
- Prepare Questions for Panel that act as the scope of work
- Prepare Briefing Book
- Identify and Invite Stakeholders to Interview Sessions
- Host Reception and Dinner
- Conduct Briefing and Tour
- Identify and Secure Location for Final Presentation

ULI Responsibilities

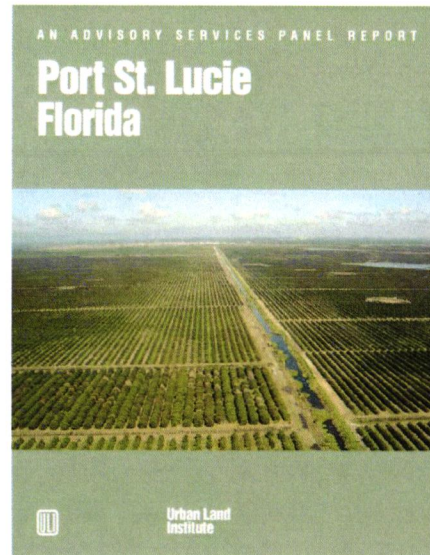
- Help Sponsor Refine Questions/Scope
- Recruit Panelists from our Membership
- Arrange all travel, lodging and meal logistics for Panel
- Attend Briefing and Tour
- Conduct Stakeholder Interviews
- Deliberate, Frame and Prepare Recommendations
- Prepare Draft Report on-site
- Prepare Presentations Summarizing Report
- Conduct Final Presentation
- Prepare and Print Final Report

Typical Agenda for Panel

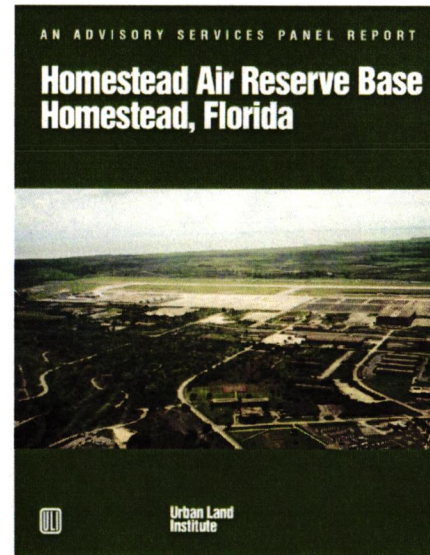
- **Sunday: Arrival and Orientation + Sponsor Dinner**
- **Monday: Briefing and Tour + Public Reception**
- **Tuesday: Stakeholder Interviews**
- **Wednesday: Panel Deliberations and Report Preparation**
- **Thursday: Report Preparation and Presentation Preparation**
- **Friday: Presentation of the Panel's Findings and Recommendations**



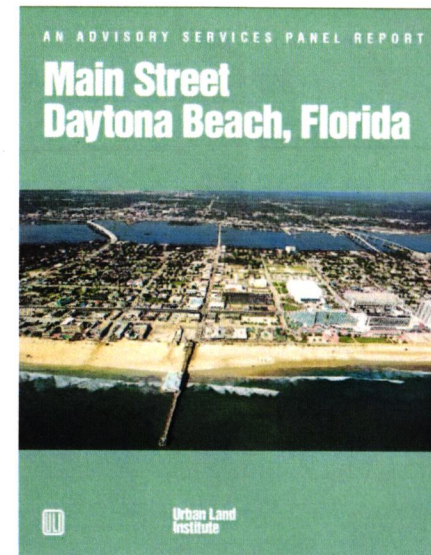
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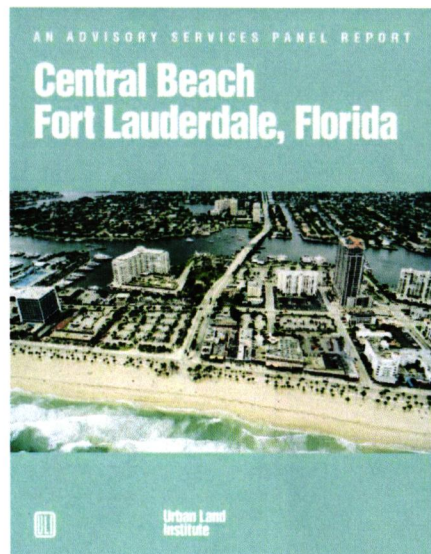
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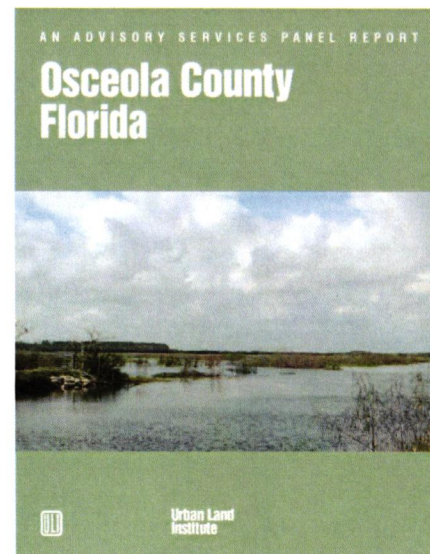
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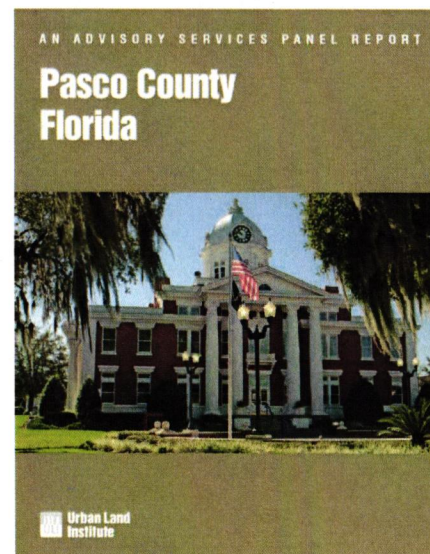
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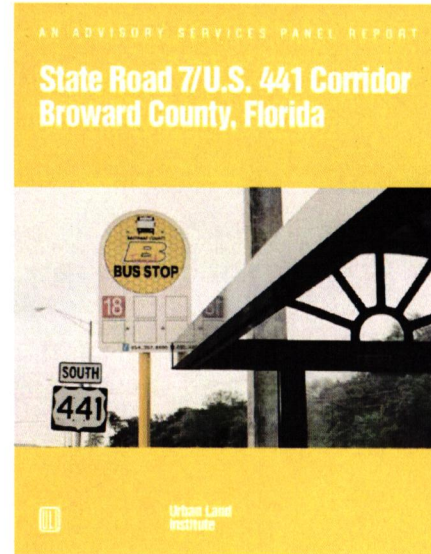
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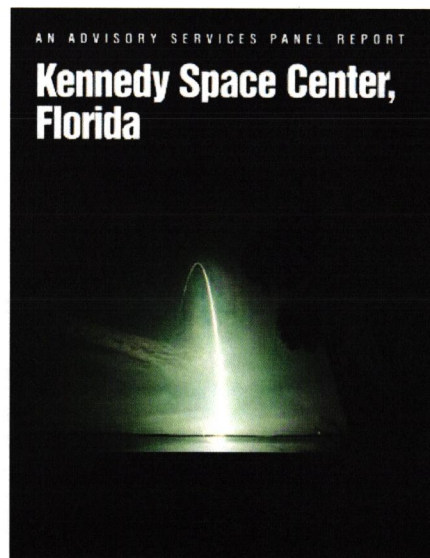
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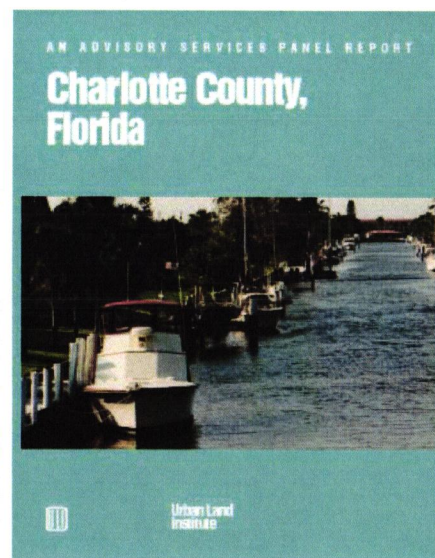
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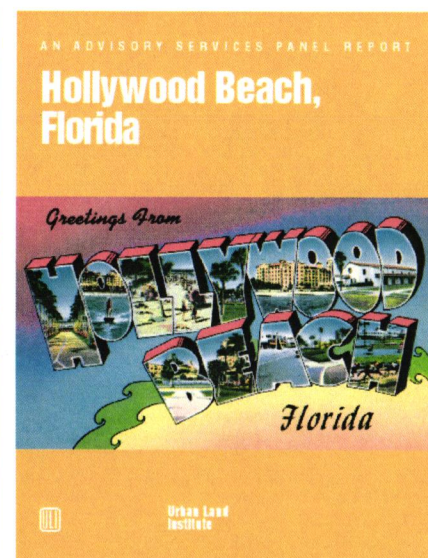
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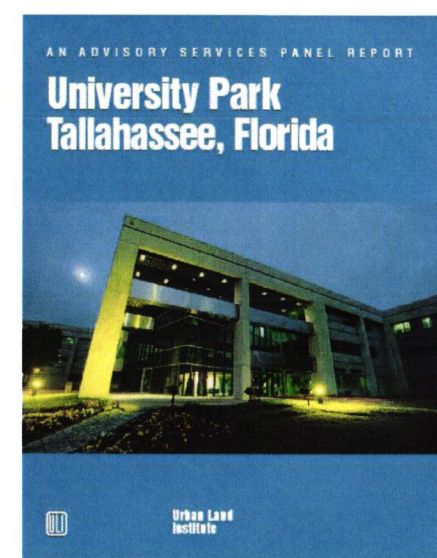
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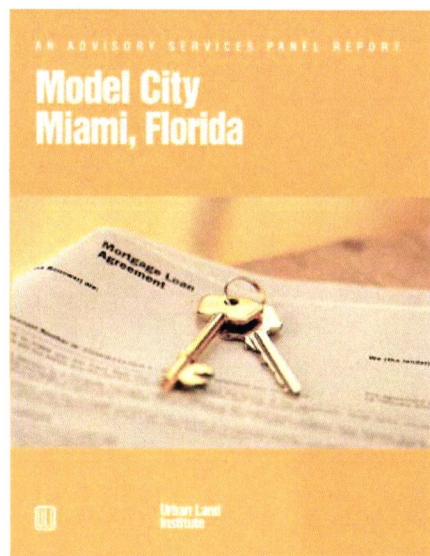
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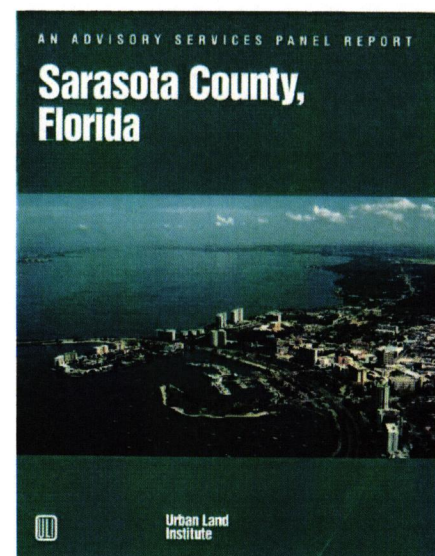
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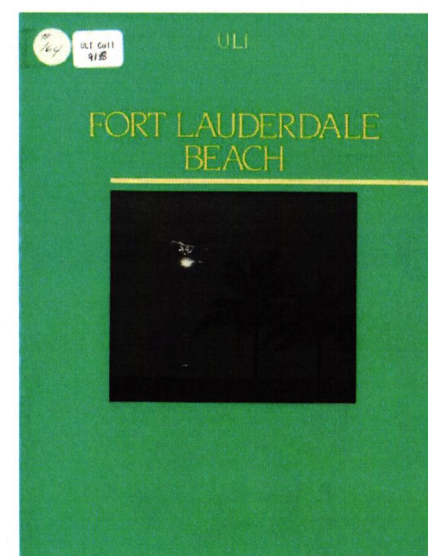
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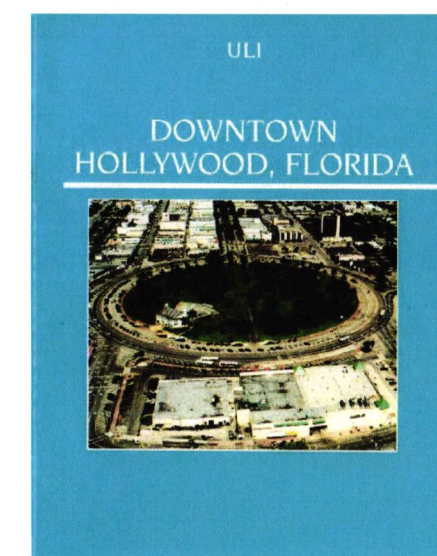
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1999



1988

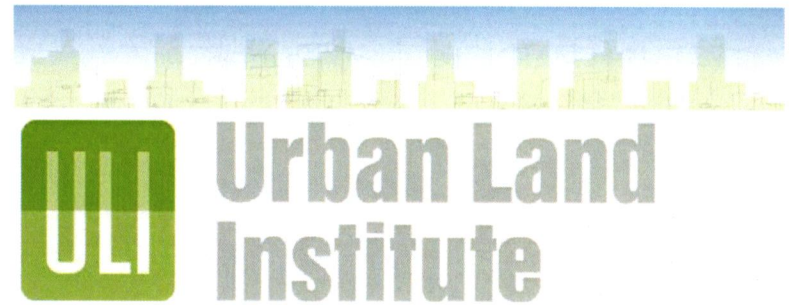
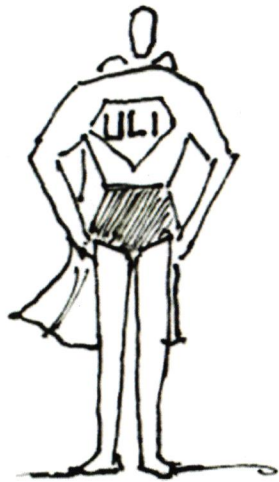


1998

Other Panels in Florida

- Tampa, 2011
- Amelia Island, 2010
- Key West, 2004
- Lantana, 2004
- Florida Department of Transportation, 2004
- Ft. Myers- Page Field, 1987
- Clearwater, 1988

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