

RFP RESPONSE PREPARED FOR:



REQUEST FOR PROPOSAL 54-24 - STATE LOBBYING
SERVICES

August 9, 2024

Alan Suskey
Executive Vice President and Principal State Practice
Bank of America Plaza
101 E Kennedy Blvd. Suite 2800
Tampa, FL 33602

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Tab 1. Letter of Transmittal

To Whom It May Concern:

On behalf of Shumaker Advisors, I would like to express our interest in representing the strategic consulting and advocacy services of the City of Clearwater (the City) now and in the future.

Headquartered in Tampa with offices in Tallahassee and Washington, D.C., Shumaker Advisors is uniquely qualified and experienced to represent the City. We have the capacity and experience to effectively build strong relationships in the spaces that impact your City, and we will leverage our networks to further advance your goals, interests, and priorities.

Plan Overview

Shumaker Advisors believes our role is to help craft and promote your goals and messages while serving as your representative within the state government and to deliver results. Throughout the term of our engagement, we will continue to help you build strong relationships with elected officials, agencies, and community leaders to further position and advance the City.

Advisors will remain committed to actively engaging with the City Council to build support for the City's priorities. Our team's ability to effectively communicate City Council policy positions to the Legislature, the Administration, and state agencies is demonstrated by our success with municipalities such as the cities of Pensacola, Gulfport, Oldsmar, and St. Pete Beach, as well as Jackson County and the town of Redington Beach.

Through targeted communication strategies, we will schedule meetings for the Mayor, members of the City Council, the City Manager, and/or City legislative staff with members of the State Senate, House, the Administration, and state agency representatives to discuss the City's concerns.

Strategic Details

We have considered the services required by the City and have crafted a potential strategy that we believe would be successful in achieving and exceeding the City's goals and requirements.

Our strategy will capitalize on the unique opportunities provided by key local figures and significant city projects. Ed Hooper and Lawrence McClure, both prominent Tampa Bay leaders serving as Appropriations Chairs, offer us a distinct advantage. Ed Hooper's prior experience on the City Council gives us valuable insights into the city's needs and priorities, while Lawrence McClure's role ensures access to critical funding and project support.

We will focus on building strong relationships with these leaders to align our efforts with their vision for the City. By leveraging Ed Hooper's deep connection to the City and his historical understanding of its governance, we can tailor our approach to address specific local needs and opportunities.

Moreover, the City's emphasis on developing the waterfront amphitheater provides a key opportunity for us. This project aims to enhance the city's cultural and entertainment offerings, and we can position ourselves as essential partners by delivering solutions that improve the amphitheater's efficiency and management. Demonstrating how our services can drive the success of such high-profile initiatives will be a central aspect of our strategy.

Ultimately, our goal is to align our efforts with the city's leadership and major projects, establishing ourselves as valuable contributors to the city's growth and development.

Why Shumaker Advisors

Clearwater is a thriving part of Pinellas County, and no one understands this better than the Shumaker Advisors team. We believe wholeheartedly in the present and the future of the City, and we will commit ourselves to achieving successful outcomes on behalf of the City as determined by our collaborative strategic approach. Our extensive experience advocating on behalf of Florida municipalities and counties gives us a refined understanding of what it will take to win with Clearwater.

We believe our experience, political networks, and strong track record of success reflect our qualifications and commitment to achieving your goals and building a successful working relationship. Shumaker Advisors wants you to have success at every level, and we look forward to discussing the possibility of working with you.

By signing and submitting this letter, we certify that our team understands the work to be accomplished and we commit to perform all work within the required time frames. Alan Suskey,

(the below signed) will hereby be authorized to make representations and bind on behalf of Shumaker Advisors.

Sincerely,



The Shumaker Advisors team assembled to work with the City consists of six key individuals who will serve as the main contacts, representatives, and project managers for this project:

- Alan Suskey, Executive Vice President and Principal State Practice
- JD White, Principal
- Jim Taylor, Vice President
- Jordyn Ferguson, Advisor
- Amy Bisceglia, Principal
- Michael "MJ" B. Johnston, Vice President

Tab 2

2.1 - Experience Successfully Lobbying or Advocating for or on the Behalf of Local Governments and/or Organizations

Shumaker Advisors' extensive municipal experience highlights our ability to successfully advocate for local governments and organizations, positioning us to effectively support the City with its state legislative priorities. In 2023, we secured significant funding for various municipal projects, enhancing infrastructure, boosting economic development, and improving community facilities. Our collaborative approach also led to substantial funding for gun violence reduction initiatives, sanitary sewer repairs, and roadway improvements. In 2024, we continued to demonstrate our expertise by securing major appropriations for housing projects, airport expansions, convention center renovations, and resilience against flooding.

Our advisors bring a combined 110 years of experience in elected office and comprises a former governor, mayors, congressmen, state legislators, and city commissioners. This diverse team, supported by a network of 350 professionals, ensures unparalleled community presence and political navigation.

Project Goal and Scope of Work: Our team brings a wealth of experience and expertise that aligns perfectly with your project goals and scope of work:

- **Tallahassee Presence:** We are prepared to maintain a dedicated office in Tallahassee, ensuring a continuous and proactive presence for the City of Clearwater.
- **Legislative and Regulatory Expertise:** With decades of experience in legislative affairs, including substantial expertise in the Florida legislative process, our team will provide timely and insightful information, assessments, and reports on state legislative, budgetary, and regulatory issues impacting the City.
- **Effective Communication:** We will facilitate and manage meetings with key stakeholders, offer strategic advice, and guide the City through the intricacies of legislative and policy discussions.
- **Funding Opportunities:** Our advisors have successfully secured over \$150 million in state funds from 2022 to 2024. Our track record includes securing substantial appropriations for cities, counties, and public authorities. We are adept at identifying

and capitalizing on state funding opportunities and will support the City's grant applications and funding efforts effectively.

- **Collaboration with Florida League of Cities:** We have extensive experience working with the Florida League of Cities and will leverage these relationships to advocate for or against budget appropriations, legislation, and agency regulations affecting cities.
- **Legislative Program Development:** Our team will review and provide strategic advice on the development of Clearwater's State Legislative Program, ensuring it aligns with the City's objectives and priorities.
- **Reporting and Updates:** We will provide regular written status reports on the State Legislative Agenda on a weekly basis during the Legislative Session and travel to Clearwater as needed to report on our activities and progress.

Our combined experience, strategic insights, and extensive network make us ideally suited to represent the City of Clearwater and support its legislative and regulatory objectives. Our proven track record of obtaining state funding for a wide range of municipal projects demonstrates our ability to navigate the complexities of state funding processes effectively. We are eager to leverage our expertise and success to support Clearwater in achieving their funding goals and enhancing their community.

2023 Municipal Representation Experience

Jackson County - Marianna Airport Crosswind Runway Rehabilitation

Jackson County and the City of Marianna received \$500,000 in state funds to add a crosswind runway at the Marianna Airport as a result of lobbying efforts by Shumaker Advisors in 2023. The airport improvements allow for increased airport runway traffic as the airport will not have to divert aircraft in the event of bad weather, promoting economic development, tourism, and commerce.

City of Pensacola - Veterans Memorial Park

Working alongside another firm, Shumaker Advisors' Alan Suskey helped secure \$750,000 in funding for improvements to the Veterans Memorial Park in Pensacola. Funds support construction of a permanent 1,750 square foot, single-story facility to house restrooms and an education center at Veterans Memorial Park which directly contributes to the health, wellness and healing that the park provides by accommodating on-site needs of visitors.

City of Pensacola - Escambia County Gun Violence Reduction

Advisors Alan Suskey and Ashton Hayward collaboratively secured more than \$1.5 million in total funding for the City of Pensacola in 2023. \$850,000 of this funding sought to mitigate gun violence by providing deputies and participating agencies real-time gunfire intelligence data. The goals are to dispatch law enforcement to precise gunfire locations, increase law enforcement response time, and increase law enforcement and public safety.

City of Gulfport - Sanitary Sewer Repairs Project

Shumaker Advisors was successful in continuing efforts from previous years for the City of Gulfport by obtaining a \$1 million appropriation for their Sanitary Sewers Project. The installation reduces inflow and infiltration of groundwater and surface water runoff, improves wastewater collection capacity, and prevents sanitary sewer overflows. These improvements prevent wet weather events from having adverse effects on residents of Gulfport and increase the efficiency of the City's overall utility infrastructure for years to come.

City of St. Pete Beach - Fire Station 22 Project

After being vetoed for FY 2022-2023, Shumaker Advisors successfully obtained \$2 million in state funding through the Department of Financial Services for the City of St. Pete Beach's Fire Station 22 for FY 2023-2024. The project allows the City to perform a complete demolition and reconstruction of Fire Station 22 and install a baby box serving the City of St. Pete's historic Pass-a-Grille beach district and surrounding locations.

Town of Redington Beach - Road Resurfacing Project

The Town of Redington Beach has invested significant funds into stormwater management in recent years, leaving their funding depleted and their roadways in need of major repairs. Working alongside Senator Nick DiCeglie and Representative Linda Chaney, Shumaker Advisors secured \$750,000 for the Town to complete needed upgrades to their roadways that allow the town to have a seamless stormwater management system.

City of Gulfport - 58th Street Roadway Improvements

With a \$1.2 million appropriation obtained by Advisors, the City of Gulfport can make much-needed upgrades to 58th street. The roadway presented driver safety concerns, and the improvement project increases the resiliency of the roadway as the City looks to mitigate for projected storm intensification. In addition, strategic sidewalk improvements serve to increase mobility options along the corridor. Shumaker Advisors leveraged their

relationships with Senator Ed Hooper and Representative Adam Anderson to successfully obtain funding for the City.

City of Oldsmar - St. Petersburg Complete Streets Project

Shumaker Advisors secured a \$1 million appropriation from the state that helped the City of Oldsmar construct a roundabout at the intersection of St. Petersburg Drive and Bayview Boulevard to calm traffic, increase safety and efficiency, and provide access to the Community Redevelopment Area. The intersection was the site of a recent fatal child-pedestrian accident, and replacing it with a roundabout utilizing funds obtained by Shumaker Advisors makes the area safer for all residents, including those attending the elementary school two blocks away.

2024 Municipal Representation Experience

City of Pensacola - Live Local Pensacola Legacy Baptist Campus

In 2024, Shumaker Advisors' Alan Suskey worked with FloridaCommerce and Senator Doug Broxson to fund the City of Pensacola's Live Local Legacy Baptist Campus project with \$7 million from the state. The Live Local Pensacola project proposal seeks funding from the State of Florida to pave the way for an innovative, transformational, attainable housing development in Pensacola with a key focus on hometown heroes, military, and workforce housing that builds upon the Florida Live Local Act. This investment complements historic state investments in workforce development by improving the region's greatest vulnerability in economic development – the availability of attainable workforce housing.

City of Pensacola - Pensacola International Airport Passenger Terminal Building Expansion & Renewal

Funded at \$5 million in the FY 2024-2025 state budget, the Pensacola International Airport Terminal Expansion and Renewal project will revitalize the airport and ensure it can properly serve the more than 3 million passengers that travel through it annually. The City of Pensacola is initiating a \$225 million Airport Modernization and Expansion Program aimed at enhancing both capacity and passenger level of service. Central to the program is a \$90 million Passenger Terminal Expansion that will add 5 gates and more than double the space for the Security Checkpoint. Funding obtained by Shumaker Advisors from the state will be instrumental in this major project.

Jackson County - Endeavor Convention Center Phase 2

In 2024, Shumaker Advisors obtained \$500,000 in state appropriations funding that will contribute to the renovation of Jackson County's Endeavor Convention Center. The county has put funds aside for the past 20 years specifically for this project, and the state funding will remove some of the financial burden for them as they work to create a premier event space in Jackson County. Additionally, the funding will allow the county to preserve the historic gymnasium space in the convention center. To successfully secure this appropriation, Shumaker Advisor Alan Suskey worked closely with Senator Jay Trumbull, Representative Shane Abbott, and Florida Commerce.

City of Madeira Beach - Seawall Replacement Project

As a result of Shumaker Advisors' diligent lobbying efforts during the 2024 Legislative Session, Madeira Beach will receive \$100,000 toward their efforts to replace three seawalls in their city. With this funding, the city will be able to make the areas stronger and more resilient to ultimately reduce flooding waters from the bay during very high tides and storms. As Florida's waterfront communities work to strengthen their defenses against hurricanes and flooding, Shumaker Advisors is prepared to go to bat on their behalf at the state level so they may continue to do so.

City of St. Pete Beach - Stormwater Outfall Structures

Working closely with Senator Nick DiCeglie, Representative Linda Chaney, and the Florida Department of Environmental Protection, Shumaker Advisors secured \$625,000 for the City of St. Pete Beach to construct three resilient stormwater outfall structures to aid in preventing storm surge flooding and high tide flooding in low-lying neighborhoods. The funding will allow the structures to incorporate tide check valves that will close against high tides and storm surges along with baffle boxes that will improve the quality of water being discharged into Tampa Bay.

Tab 2.2 - References

Each of these projects was supported through state legislative appropriations and shaped by policy council efforts, demonstrating Shumaker Advisors' expertise in navigating complex funding processes:

Jackson County

Wilanne Daniels – County Administrator

danielsw@jacksoncountyfl.gov

(850) 482-9633

Represented: September 2019 – Present

City of Pensacola

DC Reeves - Mayor

dcreeves@cityofpensacola.com

(850)435-1625

Represented: March 2023 – Present

Sarasota-Bradenton International Airport

Rick Piccolo – CEO

Frederick.Piccolo@flysrq.com

(941)359-2770

Represented: February 2017 – Present

Shumaker Advisors has strong relationships with key members of the Florida Legislature, particularly Senate Appropriations Chairman Ed Hooper, House Appropriations Chairman Lawrence McClure, and several other members of incoming leadership and the Tampa Bay/Pinellas delegation. These relationships will be crucial in advancing our strategic efforts and securing the legislative support needed to prioritize our objectives, especially during the upcoming budget planning.

We have valuable contacts with Speaker-Designate Danny Perez, President-Designate Ben Albritton, and members of the Pinellas/Tampa Bay Delegation, which will enhance our advocacy within the state government. We will focus on building even stronger relationships with Representative Adam Anderson, Representative Kim Berfield, Representative Lindsay Cross, and Representative Michele Rayner so our interests are well represented.

Should you require more detailed strategies or specific outreach plans for engaging with these offices, we are ready to assist.

Incoming Leadership:

Speaker-Designate Danny Perez

Contact: Andres Montero

Andres.Montero@myfloridahouse.gov

(305) 348-1414

President-Designate Ben Albritton

Contact: Ronnie Whitaker

Whitaker.Ronnie@flsenate.gov

(863) 534-0073

Senate Appropriations Chairman Ed Hooper

Contact: Ed Hooper/Mari Riba/Caroline Dixon

Riba.Mari@flsenate.gov

(727) 771-2102

House Appropriations Chairman Lawrence McClure

Contact: Amy Carpenter

amy.carpenter@myfloridahouse.gov

Advisor Alan Suskey maintains a close relationship with House Appropriations Chairman Lawrence McClure.

Pinellas/Tampa Bay Delegation:

Rep. Linda Chaney

Contact: Tristan Sommer

Tristan.Sommer@myfloridahouse.gov

(727) 471-4672

Senator Nick DiCeglie

Contact: Brendan Burke

Burke.Brendan@flsenate.gov

(727) 563-1910

Senator Ed Hooper

See above

Rep. Berny Jacques

Audette.Bruce@myfloridahouse.gov

(727) 519-0560

Senator Darryl Rouson

Contact: St. George "Andrew" Pink/Nick Carper

Carper.Nicholas@flsenate.gov

Pink.StGeorge@flsenate.gov

(727) 822-6828

Tab 3 - Qualifications - Education and Training of Lobbyist(s)

Our team members include:

- Alan Suskey, an eighth-generation Floridian, began working in legislative affairs in 2006, giving him over 18 years of experience in the field. Throughout his career, Alan has secured over \$300 million in appropriations, with the majority of these funds benefiting cities, counties, and public authorities. His experience in relationship-building, communication, and strategic development makes him a trusted advisor to a diverse range of clients, including world-renowned research institutes, small businesses, technology companies, and nonprofits. In addition to his professional achievements, Alan served honorably in the U.S. Army from 1999 to 2008. During his service, he earned eight Army Commendation Medals, the Valorous Unit Award, and was recognized as the U.S. Army Europe Soldier of the Year.
- JD White brings extensive public policy expertise, including his experience as a former Congressional Chief of Staff in Pinellas County. With 30 years of government and lobbying experience, JD has secured more than \$30 million in federal and state appropriations, with his largest project accounting for over \$5 million. Specializing in state lobbying, communications, federal appropriations, and policy formulation, JD understands deeply how these processes are interconnected. JD's background in government administration and his federal and state connections throughout Florida bring invaluable insight and proficiency in regional advocacy within the public sector. Notably, JD has achieved significant policy wins in transportation, healthcare, and state statute changes, including changes for more equitable time-sharing between separated parents and enabling Florida school districts to use \$300 million in capital funding.
- Jim Taylor brings over 11 years of experience as a contract lobbyist and Government Relations Director. He served as Hillsborough County Government Relations Manager/Director from 2015 to 2022 and has been active as a contract lobbyist since 2007. His background includes roles as a Legislative Aide for State Representative Jamie Grant from 2010 to 2013 and for Hillsborough County Commissioner Ken Hagan (Chair) from 2013 to 2015. Jim has successfully secured significant appropriations, including \$5 million for the Big Ben Interchange, \$3 million for the

Tampa Innovation Alliance (now the Innovation Place), and \$1.5 million for Short-term Residential Treatment beds. With a strong network within the county, he has previously served as the Director of Government Affairs and Intergovernmental Affairs Manager for Hillsborough County. His expertise encompasses local government, the Florida legislative process, and specialized areas such as mental health and economic development.

- Jordyn Ferguson has an in-depth understanding of the Florida legislative process, demonstrating proficiency in analyzing, advocating, and navigating on behalf of our clients. Her versatile contributions to the state team highlight her capacity to swiftly grasp and adapt to a range of tasks and challenges across policy areas, including education, environment, and health care. She has been recognized as a Rising Star by Florida Politics' *Influence* Magazine and is a graduate of FSU's Masters of Applied American Politics & Policy program. With nearly four years of experience working in the Florida Legislature, she has been instrumental in several legislative initiatives including appropriations projects and securing a specialty license plate for the Clearwater Marine Aquarium.
- Amy Bisceglia has been building and maintaining relationships with legislators, legislative staff, and the executive branch for nearly 15 years. Her experience makes her well-equipped to advise clients and strategize a path forward for their success. Amy has successfully advocated for clients in industries such as health care, education, child welfare, transportation, communications, utilities, retail, animal welfare, consumer finance, and Fortune 50 companies. In the last legislative session alone, Amy secured over \$23 million for her clients, with the largest project accounting for \$20 million. She was pivotal in obtaining \$40 million in special session funding for security dollars benefiting educational, community, and religious institutions.
- Michael "MJ" B. Johnston is a successful policy, technology, and procurement leader who has developed his career largely in the Executive Branch of State Government. With nearly 15 years of government service across the administrations of four Governors and nearly 3 years of lobbying experience, Michael's leadership skills and strong public policy background make him an effective and efficient advocate for clients' government and regulatory affairs. Michael's strategic planning expertise, policy development proficiency, and business acumen have enabled him to oversee

regulatory divisions with a total \$74 million annual operating budget and over 800 full-time equivalents (FTEs). His most significant accomplishment includes helping a client secure a \$4.5 million engagement with an Executive Branch agency, showcasing his ability to deliver substantial results for his clients.

LEAD CONSULTANT

Alan Suskey

Executive Vice President and Principal State Practice at Shumaker Advisors Florida
Tallahassee, Florida

Contact

asuskey@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida
Registered to Lobby Legislative Branch of Florida

Top Skills

Government Consulting
Public Policy
Program Management

Experience

Shumaker Advisors Florida, LLC, Executive Vice President and Principal State Practice
October 2021 - Present
Tallahassee, Florida, United States

Suskey Consulting, President
November 2014 - October 2021
Tallahassee, Florida, United States

Suskey Consulting is a boutique state and federal government affairs and business development consulting firm based in Tallahassee.

Capitol Insight, Lobbyist

March 2012 - November 2014

Tallahassee, Florida, United States

Capitol Insight is a government relations and political consulting firm that brings together some of the state's most distinguished leaders with strong connections from the Panhandle to the Keys. From two former Speakers of the Florida House of Representatives, to an expert political strategist and a former agency head, at Capitol Insight, our team has one thing in common – we have been through many contentious battles and have succeeded under extraordinary circumstances.

Three Bridges Advisors, Inc., Vice President

December 2010 - February 2013

Tallahassee, Florida, United States

Three Bridges Advisors Inc. is a boutique government affairs and advocacy firm representing clients before the United States Congress and the Executive Branch, with additional qualifications in State of Florida government relations. Lead by experienced industry professionals, Three Bridges Advisors offers its clients the opportunity to work with specialists in a personal and attentive manner to quickly create and implement effective federal market strategies. Three Bridges Advisors' portfolio of successful client matters spans diverse regional and subject matter areas, making it well positioned to achieve your federal relations goals today.

U.S. Army, Staff Sergeant

November 1999 - June 2008

U.S. House of Representatives, Military Fellow

June 2006 - May 2008

Education

American Military University

Bachelor's Degree, Political Science

KEY TEAM MEMBERS

John David “JD” White

Principal at Shumaker Advisors Florida
Tampa, Florida

Contact

jwhite@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida
Registered to Lobby the Legislative Branch of Florida

Top Skills

Health Insurance
Public Relations
Public Policy

Summary

Experienced executive with demonstrated success in government affairs, health care policy, communications, and business strategy. Strong skills in strategic management, crisis management, budgeting, and written and oral communication.

Experience

Shumaker Advisors Florida, LLC, Principal
December 2021 - Present
Tampa, Florida, United States

John David White is a principal at Shumaker Advisors. He has extensive experience assisting elected officials and advising clients on government relations, strategic communication, grassroots organizing, and politics.

Catalyst Consulting, Principal
March 2020 - December 2021
Tampa, Florida, United States

John David White was the owner/principal of Catalyst Consulting. He has extensive experience assisting elected officials and advising clients on government relations, strategic

communication, grassroots organizing, and politics.

Mercury, Senior Vice President

2017 - March 2020

Tampa/St. Petersburg, Florida Area

U.S. House of Representatives, Chief of Staff

March 2014 - January 2017

WellCare, Director of Government Affairs

June 2009 - March 2014

Tampa/St. Petersburg, Florida Area

Education

Florida State University

Master's Degree, Public Administration, 1998-2000

Florida State University

Bachelor's Degree, Political Science and Government, 1994-1998

Jim Taylor

Vice President at Shumaker Advisors Florida

Tampa, Florida

Contact

jtaylor@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida

Registered to Lobby Legislative Branch of Florida

Top Skills

Legislative Relations

Politics

Public Policy

Experience

Shumaker Advisors Florida, LLC Vice President

July 2022 - Present

Tampa, Florida, United States

Hillsborough County

Division Director of Intergovernmental Relations

December 2018 - July 2022

Intergovernmental Affairs Manager

November 2015 - December 2018

Legislative Aide to Ken Hagan

October 2013 - November 2015

Tampa, Florida, United States

Florida House of Representatives Legislative Aide to James W. Grant

November 2010 - October 2013

Tallahassee, Florida, United States

As Legislative Aide to Representative Grant, Jim developed an extensive knowledge of Florida state government, legislative rules, and procedures, which allowed him to excel in his role as

legislative aide. Responsibilities included: research and preparation of briefings on bills and other legislative issues; working with Representative Grant to develop and pass bills; partnering with committee staff to research and amend legislation; responding to public and private sector requests for information about bills; maintaining relationships with House and Senate members and staff; using applicable computer word processing, spreadsheet, and database programs; and attending meetings and events on behalf of the Representative.

James Grant

Campaign Coordinator for James Grant

January 2010 - December 2010

Served as the chief organizer in the daily operation of campaign headquarters, including managing volunteer activity, coordinating walking efforts, and distributing campaign materials. Assisted in set up and execution of campaign events, occasionally speaking on behalf of the candidate. Partnered with the Campaign Manager to oversee day-to-day financial activity and provided bi-weekly updates to the Campaign Treasurer.

Argosy University

Assistant Director of Admissions

November 2008 - January 2010

Recruited prospective students and evaluated applicants to uphold the University's mission to develop professional competence, provide the opportunity for personal growth, and foster interpersonal effectiveness in their students. Reported detailed weekly, monthly, and quarterly financial reports and budget projections to the Director of Admissions, consistently ranking in the top tier of assistant directors who converted potential students into applicants.

Ameritox

Project Implementation Specialist

September 2007 - May 2008

Generated sales in Southwest Florida that enrolled physicians in the Medication Monitoring Solutions Program provided by Ameritox. Consistently led in overall physician enrollments in assigned region by maintaining professional and courteous working relationships with physicians, responding to physician needs in a timely and attentive manner, and communicating physician concerns and future needs to account managers.

Florida Capitol Advocate Group
Registered Lobbyist
January 2007 - May 2007

Advocated with Senator John Grant to fulfill the legislative needs of clients. Presented legislative updates, as well as real-time briefs. Developed and passed meaningful legislation with the help of client representatives, advocates, staff directors, and Florida Legislators that provided upwards of \$500,000 in government aid to clients, such as Florida Orchestra, Lowry Park Zoological Society, and the Florida Academy of Pediatric Dentists.

Republican Party of Florida
Intern to the Executive Director
August 2006 - December 2006

Gathered all relevant information from the local republican committee chairman for the 2006 midterm election. Provided direct supervision for top public officials during quarterly board meetings.

Education

Florida State University
Bachelors of Science, Major- Political Science, Minor - Mass Communications · (2003 - 2006)

Jordyn Ferguson

Advisor at Shumaker Advisors Florida
Tallahassee, Florida

Contact

JFerguson@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida
Registered to Lobby Legislative Branch of Florida

Top Skills

Verbal & Written Communication
Research & Analysis
Adaptability

Experience

Shumaker Advisors Florida, LLC
Advisor
January 2024 - Present (7 months)
Tallahassee, Florida, United States

Shumaker Advisors Florida, LLC
Policy Analyst
January 2021 - December 2023 (1 year, 11 months)
Tallahassee, Florida, United States

Campaign for Florida Senate
Campaign Intern
August 2020 - November 2020 (4 months)
Tallahassee, Florida, United States

Assisted in the implementation of campaign strategies to procure voter support for the Candidate. Responsible for assisting campaign leadership with assigning intern tasks and coordinating interns in the field as the team grew.

Education

Florida State University

Master's Degree, Applied American Politics & Policy - 2023

Florida State University

Bachelor's Degree, Political Science, Minor in General Business · (2018 - 2022)

Amy Bisceglia

Principal at Shumaker Advisors Florida
Tallahassee, Florida

Contact

abisceglia@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida
Registered to Lobby Legislative Branch of Florida

Philanthropy

Guardian Ad Litem
James Madison Institute Leadership Fellow
Voices for Children, Board Member
Broward County Government Days, Board Member

Experience

Shumaker Advisors Florida, LLC
Principal
September 2023 – Present
Tallahassee, Florida, United States

AB Governmental Affairs
Manager
May 2020 – October 2023
Florida, United States

Rubin, Turnbull and Associates
Government Affairs Consultant
July 2016 – May 2020
Miami/ Fort Lauderdale, Florida, United States

- Built and maintained relationships with local, state, and federal officials, educating them about client priorities and goals.
- Represented clients across various fields including non-profit, education, healthcare,

and more.

- Developed strategic plans for legislative sessions using educational materials, meetings, and media events.
- Secured legislative sponsors, drafted appropriations requests, and lobbied for bill passage.
- Successfully passed legislation and secured over \$25 million in appropriations.

Tsamoutales Strategies/AB Consulting

Government Affairs Consultant

January 2014 - December 2015

Tallahassee, Florida, United States

- Specialized in legislative advocacy and public policy.
- Built relationships with Florida's legislative branches and secured legislative sponsorships.
- Delivered client reports, conducted research, and assisted with social media campaigns.
- Secured \$10 million in state funding during the 2016 legislative session.

The Florida Lottery

Public Affairs Specialist

December 2012 - January 2014

Tallahassee, Florida, United States

- Managed media relations, wrote press releases, and supported public events.
- Created content for social media and internal newsletters.

Executive Office of the Governor—State of Florida

Executive Assistant to the Chief of Staff

July 2011 - November 2012

- Managed the Chief of Staff's calendar and priorities.
- Coordinated programs and liaised with universities for internships and fellowships.

The Florida Senate—Office of the President

Chief Administrative Assistant & Internship Coordinator

January 2011 - July 2011

- Managed calendars and communications for the Senate President and Chief of Staff.
- Recruited and coordinated Senate interns.

The Florida Senate—Office of the President
Legislative Aide & Administrative Assistant
August 2010 – January 2011

- Responded to constituent correspondence and assisted with event planning.

Education

Florida State University
Bachelor of Science in Communications/Public Relations, Cum Laude (2005-2009)

Michael "MJ" Johnston

Vice President at Shumaker Advisors Florida

Tallahassee, Florida

Contact

mjohnston@shumakeradvisors.com

Professional Registrations

Registered to Lobby the Executive Branch of Florida

Registered to Lobby Legislative Branch of Florida

Top Skills

Verbal & Written Communication

Procurement

Government Relations

Experience

Shumaker Advisors Florida, LLC Vice President

January 2022 - Present

Tallahassee, Florida, United States

Responsible for advocating for clients within the Executive and Legislative branches of Florida government to help achieve and advance goals primarily in the arenas of information technology, procurement, and licensing and regulation; acting as an extension of client teams to help navigate governmental bureaucracy and find the paths of least resistance for effective solutions, savvy strategy, procurement success, and practical budgetary and policy guidance.

Florida Department of Business and Professional Regulation, Deputy Secretary of Business Regulation

February 2019 - January 2022

Tallahassee, Florida, United States

With oversight of over 800 full-time equivalent workers (FTE) and a total budget of nearly \$74 million, serves to provide smart, responsible, and fiscally sensible policy and guidance over the licensing and regulation of four major industries of alcoholic beverages and tobacco; condominiums, timeshares, and mobile homes; hotels and restaurants; and pari-mutuel wagering (including cardrooms, slot gaming industries, and administering the gaming

compact with the Seminole Tribe).

Florida Department of Agriculture and Consumer Services, Chief Information Officer

August 2011 - January 2019

Tallahassee, Florida, United States

Partnered with the division and business leadership to define their operational strategy and facilitate delivery through technology. Built relationships, created synergies, and managed strategic vendors and partners across the enterprise to enable cost-effective and innovative shared solutions.

Inspired Technologies, Inc., Consulting Services Division, Director of Business Solutions

October 2008 - Present

Tallahassee, Florida, United States

The Zimmerman Agency, Interactive Marketing Lead Consultant

March 2008 - October 2008

Tallahassee, Florida, United States

Florida Department of Management Services, Division of State Purchasing

Information Technologies Manager

July 2005 - October 2006

Operations Manager

October 2006 - February 2008

Tallahassee, Florida, United States

Unisys Corporation, Public Sector Consultant and Technical Writer

March 2001 - June 2005

Tallahassee, Florida, United States

FL Dept. of Juvenile Justice, Bureau of Data & Research, Research Associate

February 2001 - March 2001

Tallahassee, Florida, United States

FL Dept. of Juvenile Justice, Bureau of Data & Research, Research Assistant/National Policy Analyst

August 1997 - November 2000

Education

Florida State University

Bachelor of Science in Political Science, Minor in International Affairs (emphasis on East Asia),

August 1997

Tab 4 - Cost for Services

For monthly state lobbying services as outlined in the proposal, Shumaker Advisors proposes a monthly fee of \$6,000 to cover all services within the scope of services, and an additional \$250 per month for expenses.

For a 12 month duration of the contract, the total fee would amount to \$75,000. This fee reflects our dedication to providing exceptional advocacy services tailored to the needs of the City of Clearwater.

Tab 5

5.1 - Exceptions/Additional Materials/Addenda form

Attached on the following page.

EXCEPTIONS / ADDITIONAL MATERIAL / ADDENDA

Proposers shall indicate any and all exceptions taken to the provisions or specifications in this solicitation document. Exceptions that surface elsewhere and that do not also appear under this section shall be considered invalid and void and of no contractual significance.

Exceptions (mark one):

****Special Note – Any material exceptions taken to the City’s Terms and Conditions may render a Proposal non-responsive.**

- No exceptions
- Exceptions taken (describe--attach additional pages if needed)

Additional Materials submitted (mark one):

- No additional materials have been included with this proposal
- Additional Materials attached (describe--attach additional pages if needed)

We did attach our insurance provisions and lobbying registrations at the end (not sure if this counts)

Acknowledgement of addenda issued for this solicitation:

Prior to submitting a response to this solicitation, it is the vendor’s responsibility to confirm if any addenda have been issued.

Addenda Number	Initial to acknowledge receipt

Vendor Name _____ Date: _____

5.2 - Vendor Information form

Attached on the following page.

VENDOR INFORMATION

Company Legal/Corporate Name: Shumaker Advisors Florida, LLC

Doing Business As (if different than above): _____

Address: 101 E. Kennedy Blvd Suite 2000

City: Tampa State: Florida Zip: 33602

Phone: (813) 843-7882 Fax: _____

E-Mail Address: C.Schettino@shumakeradvisors.com Website: www.shumaker.com/shumaker-advisors

DUNS # _____

Remit to Address (if different than above):

Order from Address (if different from above):

Address: _____

Address: _____

City: _____ State: _____ Zip: _____

City: _____ State: _____ Zip: _____

Contact for Questions about this proposal:

Name: Celeste Schettino

Fax: N/A

Phone: (813) 843-7882

E-Mail Address: C.Schettino@shumakeradvisors.com

Day-to-Day Project Contact (if awarded):

Name: Alan Suskey

Fax: N/A

Phone: (950) 511-8314

E-Mail Address: asuskey@shumakeradvisors.com

____ Certified Small Business

Certifying Agency: _____

____ Certified Minority, Woman or Disadvantaged Business Enterprise

Certifying Agency: _____

Provide supporting documentation for your certification, if applicable.

5.3 - Vendor Certification of Proposal form

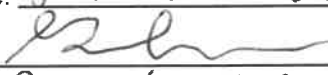
Attached on the following page.

VENDOR CERTIFICATION OF PROPOSAL

By signing and submitting this Bid/Proposal/Qualification/Response, the Vendor certifies that:

- a) It is under no legal prohibition on contracting with the City of Clearwater.
- b) It has read, understands, and is in compliance with the specifications, terms and conditions stated herein, as well as its attachments, and any referenced documents.
- c) It has no known, undisclosed conflicts of interest.
- d) The prices offered were independently developed without consultation or collusion with any of the other vendors or potential vendors or any other anti-competitive practices.
- e) No offer of gifts, payments or other consideration were made to any City employee, officer, elected official, or consultant who has or may have had a role in the procurement process for the commodities or services covered by this contract. The Vendor has not influenced or attempted to influence any City employee, officer, elected official, or consultant in connection with the award of this contract.
- f) It understands the City may copy all parts of this response, including without limitation any documents or materials copyrighted by the Vendor, for internal use in evaluating respondent's offer, or in response to a public records request under Florida's public records law (F.S. Chapter 119) or other applicable law, subpoena, or other judicial process; provided that the City agrees not to change or delete any copyright or proprietary notices.
- g) It hereby warrants to the City that the Vendor and its subcontractors will comply with, and are contractually obligated to comply with, all federal, state, and local laws, rules, regulations, and executive orders.
- h) It certifies that Vendor is not presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded, or disqualified from participation in this matter from any federal, state, or local agency.
- i) It will provide the commodities or services specified in compliance with all federal, state, and local laws, rules, regulations, and executive orders if awarded by the City.
- j) It is current in all obligations due to the City.
- k) It will accept all terms and conditions as set forth in this solicitation if awarded by the City.
- l) The signatory is an officer or duly authorized representative of the Vendor with full power and authority to submit binding offers and enter into contracts for the commodities or services as specified herein.

ACCEPTED AND AGREED TO:

Company Name: Shumaker Advisors Florida, LLC
Signature: 
Printed Name: Gino Cajanova
Title: Chief of Staff
Date: 08/07/2024

5.4 - Scrutinized Companies form(s) as required

Attached on the following page.

SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES AND BUSINESS OPERATIONS WITH CUBA AND SYRIA CERTIFICATION FORM

IF YOUR BID/PROPOSAL IS \$1,000,000 OR MORE, THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

- 1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaging in business operations in Cuba and Syria; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria; and
3. Business Operations means, for purposes specifically related to Cuba or Syria, engaging in commerce in any form in Cuba or Syria, including, but not limited to, acquiring, developing, maintaining, owning, selling, possessing, leasing or operating equipment, facilities, personnel, products, services, personal property, real property, military equipment, or any other apparatus of business or commerce; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria.

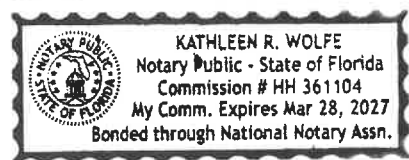
Authorized Signature
Cino Casanova
Printed Name
Chief of Staff
Title
Shumaker Advisors Florida, LLC
Name of Entity/Corporation

STATE OF Florida
COUNTY OF Hillsborough

The foregoing instrument was acknowledged before me by means of [X] physical presence or [] online notarization on, this 7th day of August, 2024, by CINO CASANOVA (name of person whose signature is being notarized) as the CHIEF OF STAFF (title) of SHUMAKER ADVISORS FLORIDA (name of corporation/entity), personally known [X], or produced (type of identification) as identification, and who did/did not take an oath.

Notary Public
KATHLEEN R. WOLFE
Printed Name

My Commission Expires:
NOTARY SEAL ABOVE



SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST CERTIFICATION FORM
THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL.
FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL
NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
3. "Boycott Israel" or "boycott of Israel" means refusing to deal, terminating business activities, or taking other actions to limit commercial relations with Israel, or persons or entities doing business in Israel or in Israeli-controlled territories, in a discriminatory manner. A statement by a company that it is participating in a boycott of Israel, or that it has initiated a boycott in response to a request for a boycott of Israel or in compliance with, or in furtherance of, calls for a boycott of Israel, may be considered as evidence that a company is participating in a boycott of Israel; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel.

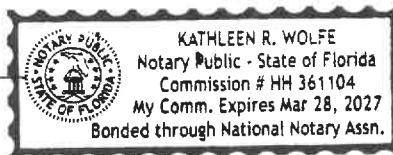
[Signature]
 Authorized Signature
Gino Casanova
 Printed Name
Chief of Staff
 Title
Shumaker Advisors Florida, LLC
 Name of Entity/Corporation

STATE OF Florida
 COUNTY OF Hillsborough

The foregoing instrument was acknowledged before me by means of physical presence or online notarization on, this 7th day of AUGUST, 2024, by GINO CASANOVA (name of person whose signature is being notarized) as the CHIEF OF STAFF (title) of SHUMAKER ADVISORS FLORIDA (name of corporation/entity), personally known X, or produced _____ (type of identification) as identification, and who did/did not take an oath.

Kathleen R. Wolfe
 Notary Public
KATHLEEN R. WOLFE
 Printed Name

My Commission Expires: _____
 NOTARY SEAL ABOVE



5.5 - E-verify Eligibility form

Attached on the following page.

E-VERIFY ELIGIBILITY FORM


VERIFICATION OF EMPLOYMENT ELIGIBILITY FORM

PER FLORIDA STATUTE 448.095, CONTRACTORS AND SUBCONTRACTORS MUST REGISTER WITH AND USE THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES.

THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The Contractor and its Subcontractors are aware of the requirements of Florida Statute 448.095.
2. The Contractor and its Subcontractors are registered with and using the E-Verify system to verify the work authorization status of newly hired employees.
3. The Contractor will not enter into a contract with any Subcontractor unless each party to the contract registers with and uses the E-Verify system.
4. The Subcontractor will provide the Contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized alien.
5. The Contractor must maintain a copy of such affidavit.
6. The City may terminate this Contract on the good faith belief that the Contractor or its Subcontractors knowingly violated Florida Statutes 448.09(1) or 448.095(2)(c).
7. If this Contract is terminated pursuant to Florida Statute 448.095(2)(c), the Contractor may not be awarded a public contract for at least 1 year after the date on which this Contract was terminated.
8. The Contractor is liable for any additional cost incurred by the City as a result of the termination of this Contract.



Authorized Signature
Gino Casanova


Printed Name
Chief of Staff

Title
Shumaker Advisors Florida, LLC

Name of Entity/Corporation

STATE OF Florida
COUNTY OF Hillsborough

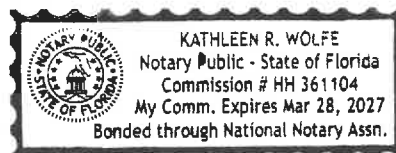
The foregoing instrument was acknowledged before me by means of physical presence or online notarization on, this 7th day of AUGUST, 20 24, by GINO CASANOVA (name of person whose signature is being notarized) as the CHIEF OF STAFF (title) of SHUMAKER ADVISORS FLORIDA (name of corporation/entity), personally known X, or produced _____ (type of identification) as identification, and who did/did not take an oath.



Notary Public
KATHLEEN R. WOLFE

Printed Name

My Commission Expires: _____
NOTARY SEAL ABOVE



Tab 5.6 - W-9 form

Attached on the following page.

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Shumaker Advisors Florida, LLC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

101 E. Kennedy Blvd. Suite 2800

6 City, state, and ZIP code

Tampa, FL 33602

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type.
See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									

OR

Employer identification number									
8	1		5	4	8	1	0	2	8

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification Instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	<i>Sarah E. Piller</i>	Date ▶	1/9/2024
------------------	----------------------------	------------------------	--------	----------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/8/2024

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

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

PRODUCER Hylant - Toledo 811 Madison Ave Toledo OH 43604	CONTACT NAME: PHONE (A/C. No. Ext): 419-255-1020		FAX (A/C. No.): 419-255-7557
	E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE			NAIC #
INSURER A : Endurance American Specialty Ins Co			41718
INSURED Shumaker, Loop & Kendrick, LLP; Shumaker Advisors, LLC; Shumaker Advisors Florida, LLC 1000 Jackson Street Toledo OH 43604-5515	SHUMA-1		
	INSURER B :		
	INSURER C :		
	INSURER D :		
	INSURER E :		
	INSURER F :		

COVERAGES

CERTIFICATE NUMBER: 120471097

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$	
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$	
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y / N <input checked="" type="checkbox"/> N / A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$	
A	Lawyers' Professional Liability			LPW30038823101	6/30/2024	6/30/2025	Each Claim Limit \$20,000,000 Aggregate Limit \$20,000,000	

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

The above Endurance American Specialty Ins Co lead policy terms are supported by the following co-subscribing insurers:
 Aspen Specialty Ins Co (NAIC #10717), policy #LR0067J24;
 National Fire & Marine Ins Co (NAIC #20079), policy #NESLP001130; and
 Bridgeway Ins Co (NAIC #12489), policy #7GA7PL000162901; primary coverage is subject to a self-insured retention of \$1,000,000 each claim; \$2,000,000 annual aggregate; \$100,000 maintenance retention.

CERTIFICATE HOLDER**CANCELLATION**

City of Clearwater Attn: Procurement Division, RFP #54-24 PO Box 4748 Clearwater FL 33758-4748	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Judy K. Wilson</i>

© 1988-2015 ACORD CORPORATION. All rights reserved.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/8/2024

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

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


PRODUCER Hylant - Toledo 811 Madison Ave. Toledo OH 43604	CONTACT NAME: PHONE (A/C No. Ext): 419-255-1020		FAX (A/C, No): 419-255-7557
	E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE			NAIC #
INSURER A : Hartford Casualty Insurance Co			29424
INSURER B : Hartford Underwriters Ins Co			30104
INSURER C :			
INSURER D :			
INSURER E :			
INSURER F :			

COVERAGES **CERTIFICATE NUMBER:** 272953193 **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	Y	Y	45UUNBD3R9B	8/1/2024	8/1/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	45UENGC4398	8/1/2024	8/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 0			45RHUBF2DAS	8/1/2024	8/1/2025	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The City of Clearwater is included as an Additional Insured as required by written contract with respects to the General and Auto Liability; coverage is primary and non-contributory; waiver of subrogation applies.

CERTIFICATE HOLDER City of Clearwater Attn: Procurement Division, RFP #54-24 PO Box 4748 Clearwater FL 33758-4748	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/8/2024

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

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

PRODUCER Hylant - Toledo 811 Madison Ave Toledo OH 43604	CONTACT NAME: PHONE (A/C. No. Ext): 419-255-1020		FAX (A/C. No.): 419-255-7557
	E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE			NAIC #
INSURED Shumaker, Loop & Kendrick, LLP; Shumaker Advisors Florida, LLC; Shumaker Advisors, LLC 1000 Jackson Street Toledo OH 43604-5515	INSURER A: Twin City Fire Insurance Co		29459
	INSURER B: Hartford Underwriters Ins Co		30104
	INSURER C: Property & Casualty Ins Co of Hartford		34690
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES

CERTIFICATE NUMBER: 664246790

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$	
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$	
A B C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A	45WEBM1068 (AZ, FL, GA, MD, MN, NE, NY, VA, OH) 45WEBM1068 (NJ, SC) 45WEBM1068 (MI, NC)	8/1/2024 8/1/2024 8/1/2024	8/1/2025 8/1/2025 8/1/2025	X <input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000	

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

Covered States: AZ, FL, GA, MD, MI, MN, NC, NE, NJ, NY, SC, VA, OH (OH-Stop Gap Only)
 Waiver of subrogation is included in favor of the City of Clearwater.

CERTIFICATE HOLDER**CANCELLATION**

City of Clearwater
 Attn: Procurement Division, RFP #54-24
 PO Box 4748
 Clearwater FL 33758-4748

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

AUTHORIZED REPRESENTATIVE

Nicholas R. Hylant

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