

FEBRUARY 13, 2025



Strategic Master Space Plan

RFP# 20250217

CBRE Americas Consulting
Proposal for Charlotte County

CBRE



From Our Team, To Yours...

CBRE, Inc. (CBRE) is pleased to present our Strategic Master Space Planning Services Proposal to support Charlotte County in professional architectural programming and master space planning services. As the world's largest commercial real estate services firm, CBRE has the unique ability to manage our clients' needs locally while bringing the depth and breadth of our global business to drive better outcomes. CBRE is ranked #138 for 2024 Fortune 500 rankings and has held the position as one of Fortunes most admired real estate companies for 14 years running. In the state of Florida, CBRE has 1,700+ employees across 11 offices. CBRE has supported Federal, State, and Local Government clients over the last 30 years to formulate and implement real estate strategies.

CBRE is pleased to team with Harvard Jolly | PBK to bring the strength, depth and capabilities of our two organizations together advancing the real estate needs of Charlotte County. Established in St. Petersburg in 1938, Harvard Jolly | PBK has been providing architecture and interior design services to clients for over 85 years and have worked with more than 60 municipalities and counties, completing over 1,250 government projects.

Together, serving as "The CBRE Team" our firms will deliver Strategic Master Space Planning Services for Charlotte County as detailed on the following pages. We appreciate the opportunity to participate in this Request for Proposals and are confident that our combined expertise, positions us to deliver a successful project that meets Charlotte County's needs. We look forward to addressing any questions the Steering Committee or core team may have regarding our proposed scope of work and team experience.

Best Regards,



Eva Garza

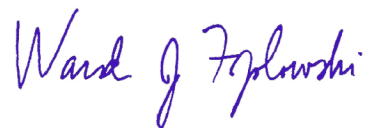
AICP, LEED AP & Prosci

CBRE | Americas Consulting
Managing Director



Nnenna Alintah

CBRE | Americas Consulting
Senior Managing Director



Ward Friszolowski

AIA

Harvard Jolly | PBK
President, COO

What Sets Us Apart

The CBRE Team would be honored to work with Charlotte County on this exciting project, and we are uniquely qualified for the following reasons:



Industry Leading Workplace Programming

As the largest commercial real estate services firm globally, CBRE is a leader in workplace consulting. With over 250 workplace strategists and 15 years of experience, we provide real-time insights into the evolving workplace landscape. Our proprietary benchmarks and extensive experience with innovative companies will guide Charlotte County in making informed long-term real estate decisions. Partnering with CBRE means leveraging unmatched resources and research to identify the best solutions.



Highly Qualified Team

The CBRE Team brings decades of experience in programming and master planning for public sector clients. We are committed to empowering Charlotte County to explore all real estate opportunities, ensuring new facilities are creative, functional, and cost-effective. Our expertise in managing diverse user groups and adhering to budget and timeline constraints will be critical to project success. We understand that being flexible, understanding the scope, and maintaining the project budget and schedule are keys to delivering a successful project. We will effortlessly blend our subject-matter experts, abundant resources, and cutting-edge technologies throughout the entire project, ensuring your objectives are not just met, but your business outcomes are transformed.



Experience with Charlotte County

Harvard Jolly | PBK has had the privilege to work with Charlotte County on projects like the Charlotte Harbor Event and Conference Center and the Punta Gorda Charlotte Library. Our insights from these projects will directly benefit this initiative.



Ability to Build Project Consensus

Through our collective experience in programming, real estate strategy, master planning and design for public sector clients, we are accustomed to effectively engaging a variety of stakeholders, including project committees, user groups, elected officials, and the public. Our goal is to deliver you a successful project that results in a functional, dynamic master plan, and we know that this will depend on gathering input from the right stakeholders at the right time. A well-planned engagement schedule will ensure that information is disseminated effectively, and decisions are made in a timely manner. Our team has a proven process for stakeholder engagement and can help the County to garner support for the project and ensure effective communication throughout.



Consultant Evaluation Form

I. Team Proposed For This Project

A. Background of the personnel

1. Project Manager
2. Other Key Personnel
3. Consultants

About The CBRE Team

CBRE, Inc.



CBRE, Inc. is a global leader in commercial real estate services and investment. Founded in 1906 and headquartered in Dallas, CBRE operates in over 100 countries with over 130,000 global employees, offering a comprehensive range of services to property owners, investors, and occupiers. The company provides expertise in various areas including property management, facilities management, project management, investment sales, and leasing, among others.

CBRE's diverse service offerings are tailored to meet the needs of different sectors, including office, industrial, retail, multifamily, and hospitality. With a commitment to innovation and technology, CBRE leverages data analytics and digital platforms to enhance decision-making and optimize real estate performance for its clients.

The firm is recognized for its deep market knowledge, extensive research capabilities, and a global network of professionals, which allows it to deliver insights and solutions that drive value and mitigate risks. CBRE also emphasizes sustainability and corporate responsibility, actively working to promote environmentally friendly practices in real estate.

Whether building a new integrated strategy, reimagining an existing option, or tackling just one aspect of the real estate ecosystem, CBRE Americas Consulting's team of 800+ professionals develop innovative solutions for the unique, complex, and interdependent challenges our clients face. We translate business objectives into smart, executable strategies that optimize cost, streamline operations, enhance performance, and elevate experience.

Harvard Jolly | PBK



Harvard Jolly | PBK is a leading architecture and design firm with a proven track record in civic and municipal projects across Florida and the Southeastern United States. Our expertise spans public safety facilities, city halls, courthouses, libraries, community centers, and more, reflecting our deep understanding of the unique needs of government and public-sector clients. We guide each project through planning, design, and construction, ensuring a tailored, functional, and enduring solution that meets the community's needs. Our ability to collaborate closely with clients results in high-performing facilities that are efficient, resilient, and designed to serve future generations.

With a relationship-driven approach, more than 85% of our projects come from repeat clients, demonstrating our commitment to long-term partnerships. Our professional team includes Registered Architects, LEED Accredited Professionals, Interior Designers, a Landscape Architect, Field Representatives, and dedicated support staff, all working together to deliver high-quality designs. Harvard Jolly | PBK is consistently ranked among the top design firms in the Southeastern U.S. by South Florida Business Journal, Building Design + Construction, and other industry publications. Our work has been recognized with numerous awards, including two American Institute of Architects' 25-Year Test of Time Awards, underscoring our legacy of excellence in civic and municipal design.

Project Co-Leads & Managers

Our team, led by Eva Garza and Nnenna Alintah, is committed to delivering **best practices, a comprehensive process, and sound recommendations** aligned with Charlotte County's objectives. Our focus will be on evaluating occupancy needs across departments, forecasting personnel growth, and identifying optimal implementation strategies to address space demand gaps. With our extensive consulting experience and CBRE's industry-leading resources, we aim to ensure that your office environments reflect top industry standards while embodying the County's culture and values, ultimately attracting top talent.

Additionally, we are collaborating with Harvard Jolly | PBK, whose team, led by Ward Friszolowski and Thomas Mayo, possesses significant experience in delivering quality outcomes for Charlotte County.



Eva Garza,
AICP, LEED AP & Prosci

Senior Managing Director

- B.S. Architecture Universidad Autonoma de Nuevo Leon
- Master in City and Regional Planning, The University of Pennsylvania
- 23 years of experience

Eva I. Garza is a Sr. Managing Director within CBRE's Consulting practice. Her expertise spans across multiple fields, including master planning, architecture, workplace strategy, transformational change and operational excellence. She leverages her extensive knowledge of public institutions and public sector experience as well as private client work to help organizations future proof their strategic solutions. Prior to joining CBRE, she was part of Cushman & Wakefield's, JLL's and HOK's consulting teams. She has master planned and designed facilities for an array of governmental clients.



**Nnenna
Alintah**

Managing Director

- Bachelor of Science, Architecture - University of Michigan in Ann Arbor, MI
- 25 years of experience

Nnenna has over 25 years of global real estate experience and is a managing Director within CBRE's America's Consulting organization. Nnenna leads complex portfolio strategy projects, focusing on delivering real estate optimization strategies and driving cost savings, with a focus on public sector clients. She has extensive expertise spanning multiple facets of real estate, from strategy development to execution, with a proven track record of successfully navigating projects through board approvals. Nnenna is experienced in Portfolio & HQ Strategy, Asset Management, Transaction Management, Portfolio Analysis, Financial Modeling, and Negotiations.

Other Key Personnel



Jeff Jones

Senior Director

- Southern Methodist University, BBA in Accounting, Cum Laude
- 12 years of experience

Jeff Jones is a Senior Director in CBRE's Consulting practice, helping clients achieve cost-effective real estate efficiencies through portfolio solutions, site location strategies, and economic incentive negotiations. He has collaborated with clients across diverse industries such as aerospace, biotech, and healthcare, specializing in global office portfolio optimization. Prior to CBRE, Jeff worked in KPMG's Audit practice, where he assisted with year-end audits and an initial public offering for their largest client in Los Angeles and gained experience in financial advisory while briefly working in London.



Jennifer Fong

Senior Workplace Manager

- Bachelor of Arts in Economics, Tufts University
- Master of Arts in Interior Design, Suffolk University
- 14 years of experience

Jennifer Fong is a Senior Manager in CBRE's Workplace practice in Chicago, where she leverages her background in finance, design, and project management to develop optimal workplace solutions. Passionate about enhancing the employee experience through smart design and strategy, she previously served as Program Manager on the Real Estate and Workplace Effectiveness team at a biotechnology company, delivering activity-based environments for nearly half of its 15,000-person corporate campus.



Marko Haarma

Vice President

- Bachelor of Arts in Economics, Tufts University
- Master of Arts in Interior Design, Suffolk University
- 21 years of experience

Marko Haarma is the Vice President of GIS for Location Intelligence at CBRE, overseeing a team that provides GIS consultation and deliverables for major clients. He has developed the Location Intelligence platform, managed the creation of advanced mapping tools, and provided solutions to clients like Google and Amazon. Marko has received multiple awards for his contributions, including the CBRE D&T Product Innovation Award in 2020 and the ESRI Special Achievements in GIS in 2017.



**Ward
Friszolowski, AIA**

President, COO

- Bachelor of Architecture, University of Texas at Austin
- Associate of Arts Degree in Applied Architecture, SUNY Farmingdale
- Florida Registered Architect, #AR13140
- 43 years of experience

Ward Friszolowski, AIA is President and COO of Harvard Jolly | PBK. He is a distinguished architect and public servant with nearly three decades of experience in both fields. Ward has led numerous significant projects, contributing to the architectural landscape of Florida. Concurrently, Ward has dedicated much of his career to public service in St. Pete Beach, Florida, serving as a City Commissioner and later as Mayor. His unique dual role earned him the title of “Citizen Architect” by the American Institute of Architects in 2018.



Tom Mayo, AIA

Managing Principal

- Master of Architecture, Bachelor of Architecture, Florida A&M University
- Florida Registered Architect, #AR0015895
- 38 years of experience

Tom Mayo, AIA, is a Managing Principal at Harvard Jolly | PBK. He is a seasoned architect specializing in strategic planning, development, and implementation, ensuring projects align with both immediate needs and long-term growth. He has led facility assessments, master planning, and phased development for civic and aviation projects, including the Charlotte County Port Authority General Aviation Terminal Expansion and the Lee County Port Authority Page Field General Aviation Terminal. With expertise in stakeholder collaboration, regulatory coordination, and budget-conscious planning, Tom delivers functional, adaptable, and future-ready facilities that meet the evolving demands of communities and infrastructure.



**Amy Bradlow,
AIA, LEED GA**

Principal

- Bachelor of Architecture, University of Miami
- Florida Registered, #AR96872
- 17 years of experience

Amy Weber Bradlow, AIA, LEED AP, is a Principal at Harvard Jolly | PBK where she drives civic design strategy creating adaptable, community-focused public spaces that prioritize innovation, sustainability, and resilience. Amy has devoted the majority of her experience to County and municipal clients. Amy is experienced in the design of libraries, community centers, senior centers, City Halls, Police Station and other governmental project types.

II. Proposed Management Plan

A. Team Organization

1. List responsible leads for each initiative.



Charlotte County
Core Team &
Steering Committee

THE CBRE TEAM LEADERSHIP

EVA GARZA, AICP,
LEED AP & PROSCI

Co-Lead,
Master Planning

NNENNA
ALINTAH

Co-Lead,
Portfolio Strategy

WARD
FRISZOLOWSKI, AIA

Oversight, Departmental
Due Diligence &
Masterplan Concepts

TOM MAYO, AIA

Oversight, Departmental
Due Diligence &
Masterplan Concepts

WORKSTREAM LEADS

JEFF JONES

Portfolio Real Estate
Scenarios & Financial
Modeling

MARKO HAARMA
& GIS ANALYSTS

Location Intelligence

JENNIFER FONG

Departmental
Programming &
Space Standards

AMY BRADLOW,
AIA, LEED GA

Departmental
Due Diligence &
Masterplan Concepts

L – Lead Role A – Assist Role	Refine Project Goals & Objectives	Profile Existing Departments	Develop Uniform Space Standards	Forecast Future Personnel	Project Future Space Needs	Develop Detailed Recommendations	Develop Alternatives to Meet Future Needs	Recommended Strategic Master Space Plan
Eva Garza	L	L	L	L	L	L	L	L
Nnenna Alintah	L	A	A	L	L	L	L	L
Jeff Jones	A	A	A	A	A	A	L	A
Jennifer Fong	A	L	L	L	L	A	A	A
Marko Haarma & GIS Analysts	A	A	A	A	A	A	A	A
Ward Friszolowski	A	A	A	A	A	A	A	A
Tom Mayo	A	A	A	A	A	L	L	L
Amy Bradlow	A	A	A	A	A	L	L	L

III. Previous Experience Of Team Proposed For This Project

A. Describe specific programming initiatives with similar scopes while identifying lead roles and responsibilities of each lead identified in Part II.

TEAM MEMBER	PREVIOUS EXPERIENCE
Eva Garza	<ul style="list-style-type: none"> – Project Lead & CM – Broward County Courthouse Relocation & Change Management – Project Lead & Economic Advisor– City of Miami “Calle Ocho” Master Plan – Project Lead – City of Marathon Economic Master Plan – Project Lead – Miami Dade Parks & Recreation Department Strategic Plan – Project Lead Co-Lead - PENN Station USPS Programming Strategy – Project Lead – The University of Pennsylvania Economic Master Plan (40th Street) – Co-Lead – FBI Headquarters Strategic Masterplan – Co-Lead – MITRE Programming & Design Standards – Project Manager – USDHS Headquarters Strategic Master Plan – Project Manager – Jackson Memorial Hospital Master Plan – Planner & Economic Advisor – Fort Lauderdale International Airport and Miami International Airport Expansion Strategy – Planner & Economic Advisor – MDX Transportation Master Plan
Nnenna Alintah	<ul style="list-style-type: none"> – Project Lead – Tennessee Valley Authority Valley Wide Programming & Regional Plan – Project Lead – State of New York Portfolio Space Optimization Plan – Project Lead – State of Maryland OGS Programming & Occupancy Plan – Project Lead - Dartmouth University Space Programming & Change Management – Project Lead – Hydro One Strategic Master Plan – Workplace Strategy Lead – McMaster University Strategic Real Estate Plan – Project lead – American University Ancillary Facilities Strategic Plan
Jeff Jones	<ul style="list-style-type: none"> – Project Lead – Puget Sound Energy Portfolio Strategy – Project Lead – Confidential Life Sciences Client Global Real Estate Consolidation Strategy – Project Lead – DXC Global Real Estate Consolidation Strategy – Project Lead – SoCal Edison Real Estate Strategy and Facility Condition Assessment – Project Lead – Confidential Client Lease versus Own Analysis (USA) – Project Lead – Confidential Client HQ Campus Optimization Strategy (FL) – Project Lead – Confidential Client HQ Campus Optimization Strategy (CA) – Project Lead – Confidential Client HQ Campus Optimization Strategy (PA) – Project Lead – Confidential Client HQ Campus Optimization Strategy (WI, SD, IA) – Project Lead – Confidential Client HQ Campus Optimization Strategy (NY)
Jennifer Fong	<ul style="list-style-type: none"> – Project and Workplace Lead – State of Michigan Building Occupancy Study – Workplace Strategy Lead – City of Sugarland Master Plan – Workplace Strategy Lead - Dartmouth University Space Programming & Change Management – Workplace Strategy Lead – Tennessee Valley Authority Valley Wide Programming & Regional Plan – Project and Workplace Lead – Confidential Life Sciences Company Campus Analysis

TEAM MEMBER	PREVIOUS EXPERIENCE
Marko Haarma	<ul style="list-style-type: none"> – City of Buda Highest & Best Use – State of New York DMV Market Optimization and Portfolio Restructuring – Province of British Columbia EVC Application & Consulting – CNN Center Location Intelligence
Ward Friszolowski	<ul style="list-style-type: none"> – City of Zephyrhills Downtown Master Plan – Spanish River Library & Community Center – Sarasota County Gulf Gate Library – City of Clearwater Countryside Branch Library – Sarasota County New RL Anderson Courts Expansion Masterplan – City of Dunedin City Hall – Bellair Beach Community Center – Largo Cultural Center Auditorium and Multi-Use Facility Master Plan – City of Treasure Island Community Center Space Needs Analysis – Charlotte Harbor Event and Conference Center – Pasco Hernando State College Performing Arts Center – City of Gulfport Cultural Center Master Plan, Library, Senior Center, and Theater – Babcock Ranch Town Center Master Plan & implementation
Tom Mayo	<ul style="list-style-type: none"> – Florida Gulf Coast University, Parking Garage One – Charlotte County Port Authority, General Aviation Terminal Expansion – Scanlon Lexus Auto Dealership, Lee County – Haynes Corporation Manufacturing Facility, Collier County – 22,500 sf – Charlotte County Port Authority, Central Administration Building – Lee County Port Authority, Page Field General Aviation Terminal & Hanger – Lee County Port Authority, Pedestrian Walkway Covers Design Analysis/Design – Lee County Port Authority, Airport Rescue and Fire Fighting Facility Expansion – Collier County School District, Transportation Facility – Lee County Port Authority, TSA Offices Remodel – Carillon Office Building, Catalina Corporation, St. Petersburg, FL
Amy Bradlow	<ul style="list-style-type: none"> – City of Zephyrhills Downtown Master Plan – City of Dunedin, City Hall – Babcock Ranch Town Center Master Plan & implementation – City of Gulfport Cultural Center Master Plan, Senior Center & Theater – Punta Gorda Charlotte Library – City of Treasure Island Community Center Space Needs Analysis – City of Zephyrhills Public Library – City of Tampa Robert W. Saunders Public Library – Sarasota County Gulf Gate Library, Sarasota, FL – Hillsborough County Brandon Library Replacement – City of Clearwater Countryside Library – The James Museum of Western & Wildlife Art – City of Clearwater Mixed Use Osceola Parking Garage

B. Provide examples of individual roles in Strategic Planning Development and implementation plans.

CBRE and Harvard Jolly | PBK bring together a wealth of experience, industry leadership, and a proven track record in strategic planning development and implementation, making us highly qualified to support Charlotte County's real estate needs. Both firms have successfully completed numerous similar projects (see case studies included), demonstrating our ability to manage complex strategic planning and implementation tasks within budget and on schedule.

The combined expertise of CBRE in strategic real estate planning and Harvard Jolly | PBK in architectural design ensures that projects are not just planned well but are also implemented effectively. This partnership leverages CBRE's global resources and Harvard Jolly | PBK's local knowledge to provide comprehensive solutions.

The team members for this project have been thoughtfully chosen for their expertise, which directly aligns with the needs of Charlotte County. Below is a concise summary of their recent experience in strategic planning development and implementation:

Eva Garza, AICP, LEED AP & Prosci

Experience: Eva has extensive experience in master planning and strategic development for various governmental clients, including the U.S. Department of Homeland Security and the FBI. She has successfully led strategic planning efforts and implementations for the Broward County Courthouse Relocation and Change Management Project and the City of Miami "Calle Ocho" Master Plan.

Nnenna Alintah

Experience: Nnenna has over 25 years of experience in portfolio strategy and optimization. She has recently led strategic planning initiatives for the Tennessee Valley Authority, State of New York, and Dartmouth Health, successfully navigating projects through approvals and aligning real estate strategies with organizational goals.

Jennifer Fong

Experience: Jennifer has led strategic planning initiatives for the State of Michigan and the City of Sugarland, conducting due diligence and gathering departmental requirements and developing space allocation standards and phased implementation strategies.

Jeff Jones

Experience: Jeff has managed the development portfolio optimization strategies for clients like Puget Sound Energy and Southern California Edison, providing strategic recommendations based on comprehensive financial analysis.

Marko Haarma

Experience: Marko has provided GIS solutions for clients like Google and Amazon, leveraging advanced mapping tools to inform strategic planning decisions.

Ward Friszolowski, AIA

Experience: With over 43 years of professional experience, Ward has managed municipal and county projects, including the City of Zephyrhills Downtown Master Plan and the Babcock Ranch Town Center Master Plan, ensuring successful project delivery within budget and on time.

Tom Mayo, AIA

Experience: Tom has led facility assessments, master planning, and phased development for civic and aviation projects, including the Charlotte County Port Authority General Aviation Terminal Expansion and the Lee County Port Authority Page Field General Aviation Terminal.

Amy Bradlow, AIA, LEED GA

Experience: Amy has extensive experience in designing government facilities, including libraries and community centers, ensuring that design solutions meet client needs and budget constraints.



CHARLOTTE HARBOR - HARVARD JOLLY | PBK

C. Provide examples of individual roles in completing a Master Space Plan within a fixed budget.

The CBRE Team has extensive experience and is well-equipped to develop an effective Master Space Plan for Charlotte County within a fixed budget. Nearly all the strategic planning projects listed for each team member in the previous section were conducted on a fixed fee basis. Central to our approach is strong communication among all stakeholders, which is essential for maintaining both budgetary and scheduling integrity. We understand the unique needs of public sector clients and are dedicated to the responsible management of public funds. Our proven track record of successful projects with fixed budgets for government clients demonstrates our ability to deliver comprehensive and cost-effective solutions. We are equipped with the necessary tools and expertise to meet Charlotte County's specific needs and drive transformative outcomes. We are committed to providing exceptional service at competitive rates and will adhere strictly to the County's budget.

D. Demonstrate ability to work with multiple stakeholders to gain collaborative input and deliver team-developed results.

The CBRE Team has a robust history of successfully working with public sector clients, understanding the unique dynamics of stakeholder engagement required to drive project success. Our approach is built on a foundation of collaboration, transparency, and strategic communication, which are vital for achieving buy-in from diverse stakeholder groups. In every project, we prioritize stakeholder engagement by employing structured collaboration processes that ensure all perspectives are considered and integrated into decision-making. This includes conducting workshops, meetings, and feedback sessions designed to actively solicit diverse viewpoints and gather collaborative input. Ultimately, this structured engagement contributes to successful project outcomes.

Example Projects:

Punta Gorda Charlotte Library:

Harvard Jolly | PBK employed a comprehensive stakeholder engagement process for the Punta Gorda Charlotte Library project, focusing on program and space needs. The firm conducted a series of public meetings and workshops, actively involving community members, library staff, and local officials in discussions about the library's design and functionality.

This collaborative approach ensured that the final design included essential spaces such as meeting rooms, a dedicated area for the Friends of the Library, and youth program areas, aligning with the community's specific needs and preferences. By prioritizing stakeholder input, Harvard Jolly | PBK developed a library that not only meets programmatic requirements but also serves as a welcoming and functional space for all users.



PUNTA GORDA CHARLOTTE LIBRARY - HARVARD JOLLY | PBK

Example Projects (continued):

State of New York Real Estate Optimization:

In a bid to adapt to post-pandemic shifts toward hybrid work, the New York State Office of General Services (OGS) partnered with CBRE Americas Consulting in February 2024 to develop a comprehensive space and portfolio utilization strategy. Over 100 stakeholders from various state agencies were engaged through executive leadership visioning sessions, focus groups, and structured interviews. This collaborative effort aimed to balance the need for worker flexibility, space efficiency, cost reduction, and environmental impact mitigation. The resulting plan proposed a significant reduction in the real estate footprint, particularly in the Capital Region and New York City, by consolidating underutilized spaces, adopting new space standards, and enhancing collaborative and technological infrastructure. The strategy aims to optimize the state's office portfolio while aligning with the unique needs and preferences of each agency.

Tennessee Valley Authority (TVA) Real Estate Strategy:

For TVA, CBRE conducted detailed space programming and developed occupancy scenarios through extensive stakeholder engagement. CBRE administered a survey to all TVA employees, held numerous workshops and meetings with 16 business units to gather input and build consensus on the strategic direction. The outcome was a strategic master plan that aligned with TVA's long-term goals and optimized their real estate portfolio.

IV. Project Control

A. Schedule

1. What techniques are planned to assure that schedule is met?

To ensure the project schedule is met, CBRE will align project phases with Charlotte County's timeline. We will hold weekly meetings with the County's core project team, using a structured agenda to review key actions, progress, and risks, and we will provide meeting minutes afterward. These meetings will help track progress, identify potential barriers, and maintain alignment among all stakeholders. We will utilize communication tools such as Slack, Zoom, Microsoft Teams, and Yammer, working with the County to establish best practices for technology use from the outset.

Timely responses and flexibility are vital for project success. We will set specific milestone goals for each design phase and track them through a Critical Path Method-based schedule. While CBRE offers global resources and benchmarking tools, our collaboration with Harvard Jolly | PBK, allows us to provide attentive, local support.

To ensure timely core project team and steering committee reviews, we will allocate sufficient time for stakeholder feedback, including user groups and departmental administration. Additionally, CBRE will co-facilitate sessions with County stakeholders to present findings and recommendations, fostering discussion and incorporating feedback into the final deliverables for Charlotte County.

2. Who will be responsible for ensuring that the schedule will be met?

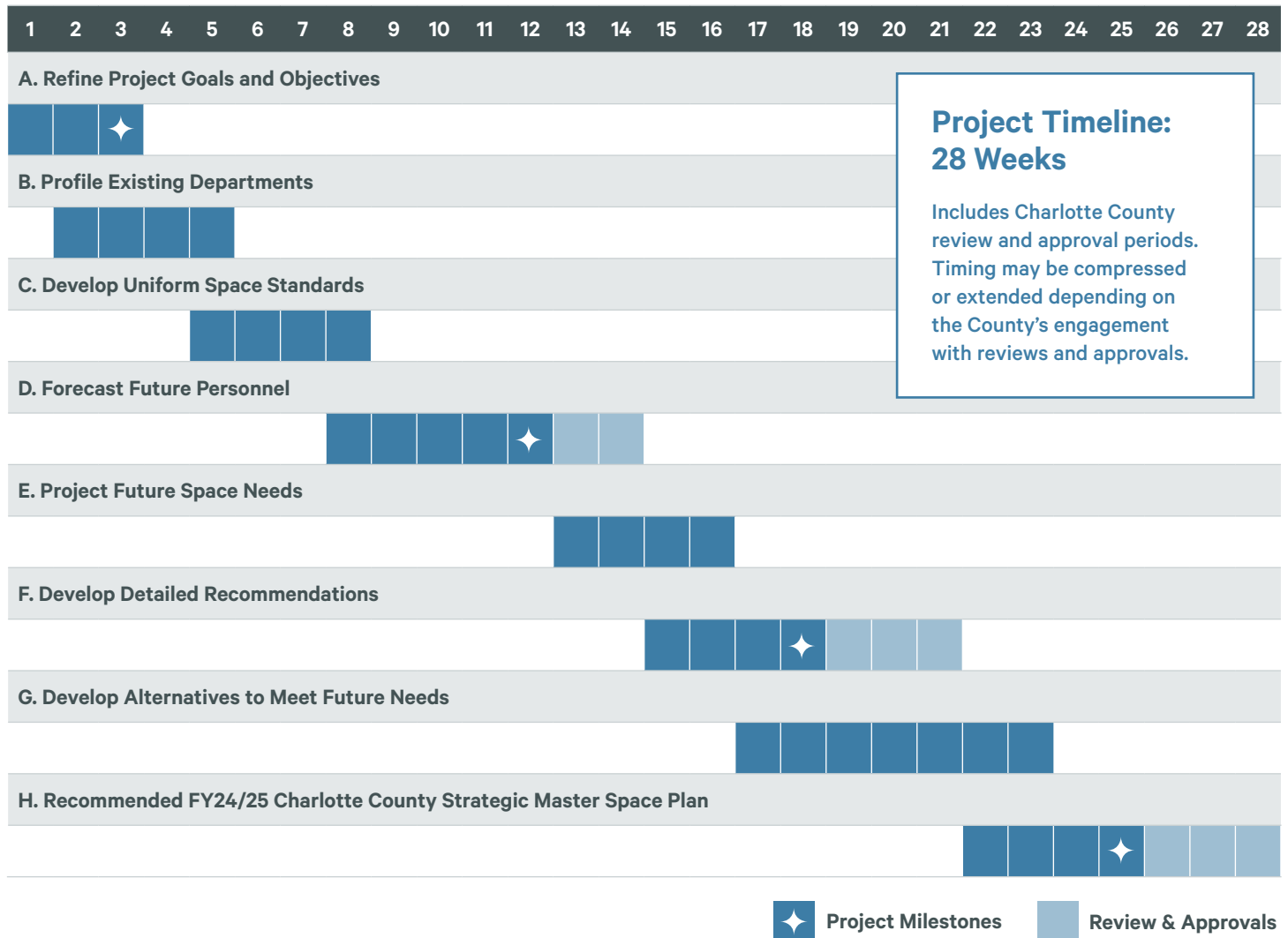
Our project co-leads, Eva Garza and Nnenna Alintah, will be responsible for ensuring that the schedule is met. They will work closely with Project Manager Tom Mayo, who will oversee design and documentation to ensure compliance with the agreed-upon timeline. We recommend appointing a Single Point of Contact (SPOC) from the County to assist with scheduling and enhance stakeholder engagement early in the process.

B. Cost

1. What control techniques are planned?

Effective communication among all parties is essential to keeping the project on budget and on schedule. At the project's outset, we will establish and document clear project goals, timelines, and milestones. Throughout the project, we will maintain the schedule by setting specific milestone goals for each phase, complete with target completion dates. Our approach ensures flexibility, timely responses, and quick turnarounds, all of which are critical for project success.

We propose the following project schedule:



Our team will develop, update, and report progress using a Critical Path Method-based schedule until 100% contract completion. While our project team will provide the personalized attention of a small firm, our larger organizational structure allows us to augment the team with additional resources as needed to maintain your schedule.

To ensure we stay on track, we will allocate sufficient time for reviews during the process. We will incorporate adequate meetings into the schedule to keep stakeholders informed of progress and to allow for feedback and adjustments. Engaging various stakeholder groups and decision-makers early in the process is crucial for gathering input and securing buy-in, which will help prevent project delays. Developing an engagement plan at the outset will facilitate timely stakeholder involvement and ensure a smooth workflow throughout the project.

2. Demonstrate ability to meet project cost control.

Our team is committed to effective cost control throughout the duration of our fixed fee consulting assignment for developing the programming and strategic master plan for the County. Our approach is built on a foundation of transparency, proactive management, and robust tracking mechanisms. Here's how we ensure that we meet project cost control effectively:

- **Fixed Fee Structure:** Our engagement operates on a fixed fee basis, which provides clarity and predictability regarding project costs from the outset.
- **Comprehensive Budgeting:** We will create a detailed project budget that outlines all anticipated costs, serving as a baseline for tracking expenses.
- **Regular Reporting:** We will provide consistent updates to the County, tracking our work complete against each phase of the project, allowing for transparency and timely adjustments if variances occur.
- **Efficient Resource Allocation:** Our experienced team will allocate resources strategically to minimize overruns and meet project milestones.
- **Proactive Risk Management:** We will identify potential risks early and implement strategies to mitigate them, avoiding unforeseen expenses.

3. Who will be responsible for the cost control?

The project co-leads, Eva Garza and Nnenna Alintah, will be responsible for cost control, collaborating closely with project stakeholders to ensure adherence to the budget and prompt reporting of any discrepancies. Additionally, the engagement manager, Jennifer Fong, will oversee the team's availability through a comprehensive resource management system that tracks ongoing and recent projects, highlighting workload capacity. This system will facilitate a balanced distribution of resources, ensuring effective management of the Charlotte County Strategic Master Space Plan.

4. Recent, current, and projected workload.

The CBRE Team's current workload ranges from 40% to 90%; however, we expect several ongoing projects to conclude shortly before the award date for the Charlotte County Strategic Master Plan. This will reduce the workload for all proposed team members to approximately 10% to 50%, ensuring that they are readily available to dedicate their efforts to the project.

Both CBRE and Harvard Jolly | PBK are **committed to maintaining personnel continuity, and we will not substitute team members without the explicit permission of Charlotte County.** This approach ensures that the project benefits from consistent expertise and fosters a collaborative working relationship.

TEAM MEMBER	CURRENT WORKLOAD	PROJECTED WORKLOAD
Eva Garza	75%	15%
Nnenna Alintah	90%	50%
Jeff Jones	40%	50%
Jennifer Fong	80%	50%
Marko Haarma	95%	75%
Ward Friszolowski	75%	10%
Tom Mayo	65%	10%
Amy Bradlow	65%	15%

V. Present Proposed Design Approach For This Project

A. Describe proposed programming implementation strategy to include scheduling recommendations.

As your partner, you can expect The CBRE Team to be inquisitive, committed and highly engaged. Our team's passion for delivering solutions is evident through our collaboration and interpersonal relationships with clients. Having delivered similar projects in size and scope across institutional and governmental clients, our proposed programming implementation strategy is proven and tech-enabled for efficient performance. Guided by industry leaders and award winning designers, the entire CBRE Team is well versed on culture, needs and aspirations for innovative workplace strategies. The scope of work outlined in the following pages is comprehensive in nature while having been tailored to Charlotte County's requirements. The proposed programming implementation strategy involves a phased approach, starting with stakeholder engagement to establish goals and departmental interviews to identify needs. Scheduling will follow a timeline that includes initial assessments, data collection, analysis, and iterative feedback loops. Regular milestones will be established to ensure timely progress.

Our collective efforts will concentrate on the following key areas:

- **Confirming and prioritizing** Charlotte County's departmental requirements and adjacencies
- **Identifying and evaluating all relevant benchmarking** that align with the organization's goals and space allocation metrics.
- **Employing forward-thinking strategies** that enhance value creation through potential space standard changes.
- **Balancing future requirements with budgetary constraints and exploring alternative strategies**
- **Developing a robust set of alternative solutions** and achieving consensus on the optimal implementation strategy.

B. What problems do you anticipate and how do you propose to solve them?

In our experience, data accessibility issues, departmental leadership availability, and stakeholder resistance may pose delays to our proposed project schedule. To address these, we propose establishing clear communication channels and weekly calls to facilitate data sharing and departmental leadership engagement, ensuring all parties understand the benefits and processes involved.

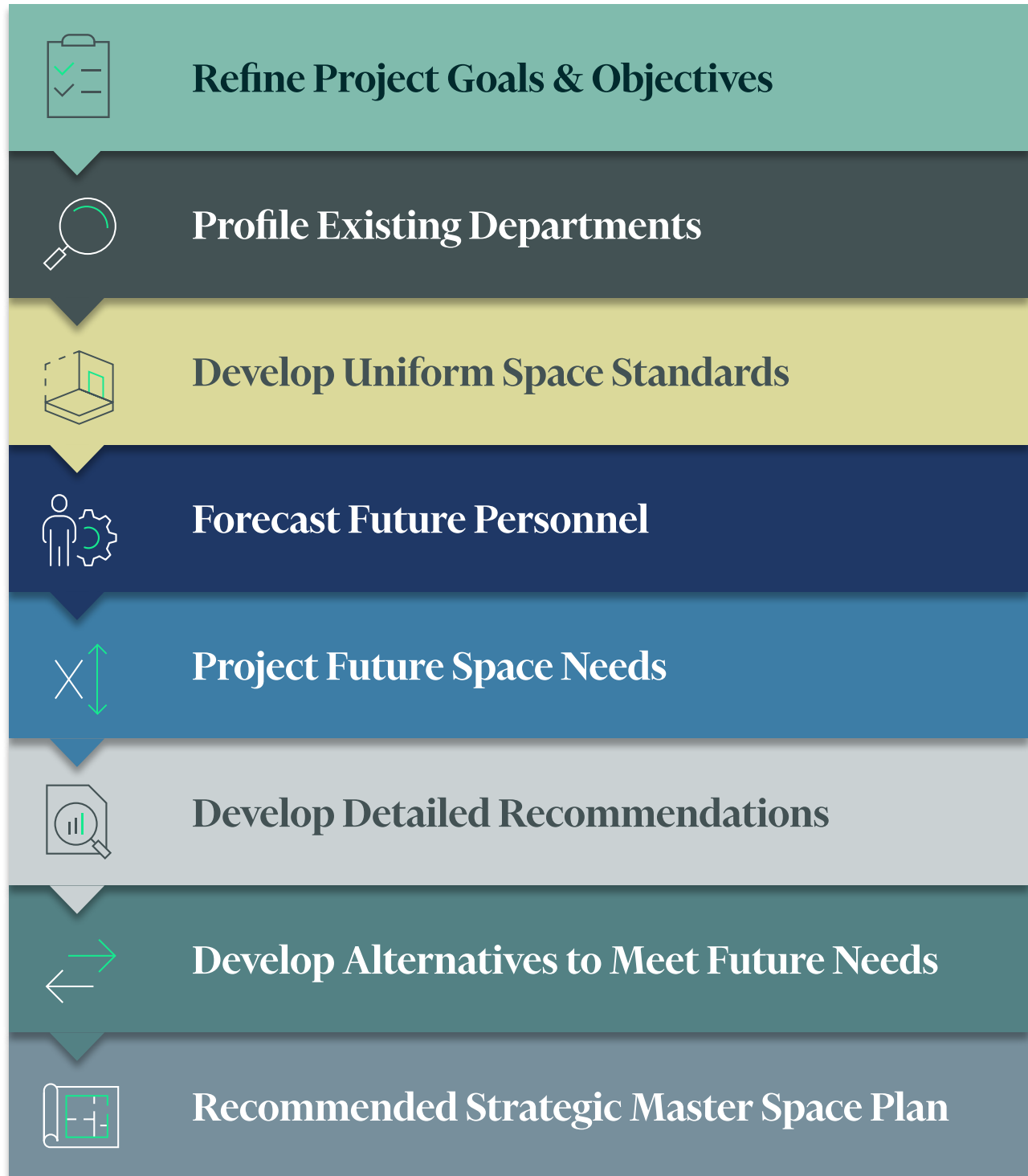
C. What approach will be taken to gather and utilize new and existing data, obtain industry standards, and determine recommendations.

As noted in our detailed scope of work, included in the following pages, we will conduct a comprehensive data audit to identify existing standards and gaps. New data will be gathered through interviews, questionnaires, observations and industry benchmarking. We will leverage industry standards and utilize The CBRE Team's tools to synthesize data into actionable insights for recommendations.

D. Describe innovative approaches to resiliency planning.

Innovative approaches to resiliency planning, as noted in our proposed scope of work, include scenario modeling and the integration of technology such as GIS for spatial analysis. We will also explore sustainable solutions and adaptive management strategies to enhance system resilience.

Our Approach for Charlotte County



A. Refine Project Goals And Objectives

During the goals and objectives stage we will request existing plans and documentation to understand the efficiency and effectiveness of Charlotte County facilities and establish shared goals and objectives that will guide project activities.

Request for Information

A Request for Information (RFI) outlining data and documents required to support analysis and project delivery will be provided and reviewed. This RFI shall allow The CBRE Team to gather previous strategic master plans as well as detailed information about current headcount by department and sub-department, floorplans, org charts, the County's guiding principles and current space allocation standards.

Project Kick-Off Meeting

The CBRE Team and the Charlotte County core team will schedule a one-hour working session to include all project team and steering committee members to kick-off the project, establish project objectives, understand challenges and risks, and uncover potential opportunities. We will use this time to align on proposed activities, establish a schedule, and confirm roles and responsibilities.

Steering Committee Visioning

Following the kick-off, The CBRE Team and the Charlotte County core team will schedule a 90-minute visioning session to include all project team and steering committee members to review workplace trends and best practices. During this session we will also gather participant's input as we explore the topics of space, culture, wellbeing, technology, customer/public interface, and brand to help us define what the future workplace experience needs to be for Charlotte County offices. The purpose of this session is to ensure we define the future vision, establish target metrics we will be solving for, and define how the success of this initiative would be assessed.

Weekly Project Calls

The CBRE Team will schedule weekly project update meetings with the core project team. We will use this time to ensure all work streams are integrated and that the project is tracking on scope, schedule, and budget. These calls shall be approximately 30-45 minutes and virtual (Teams or Zoom calls).

CBRE			
* Items needed to kick off project			
Requested	Information	Date	Status
Requested	1. Multi-plan plan is required, along with a detailed floor plan that includes: furniture, equipment, type of space (designated, conference, meeting, etc.), main department/units	11/11/2025	Not Started
Requested	2. Existing space profiles and standards including furniture dimensions, configurations, technology setup, and how space is allocated	11/11/2025	Not Started
Not Available	3. Previous workplace improvement recommendations or reports	11/11/2025	Not Started
Not Available	4. Current individual storage solutions for employees (at desk, lockers, file storage), plus large storage units for possible new furniture storage	11/11/2025	Not Started
Requested	5. Current organizational chart	11/11/2025	Not Started
Requested	6. List of all current team members and contact information. Requested for Office Manager that can virtually meet or through the space	11/11/2025	Not Started
Requested	7. All office documentation on workplace related programs (e.g. networking, unassigned meeting, flexible hours, food & beverage offerings, health & wellness offerings)	11/11/2025	Not Started
Requested	8. Current IT situation for personal technology (laptops, desktops, tablets, etc.) and for meeting rooms (monitors, phones, etc.)	11/11/2025	Not Started
Not Available	9. Real Estate KPIs and performance metrics related to workplace initiatives	11/11/2025	Not Started
Requested	10. Technology equipment available	11/11/2025	Not Started
Not Available	11. Current data on office space utilization solutions by room type & utilization metrics	11/11/2025	Not Started
Not Available	12. Technology storage & mapping	11/11/2025	Not Started
Requested	13. Business Units and Personnel Data	11/11/2025	Not Started
Requested	14. Organization charts for business units and locations (electronic format)	11/11/2025	Not Started
Requested	15. Floor plans with current departmental allocation plan	11/11/2025	Not Started
Requested	16. Current space requirement standard (engineering)	11/11/2025	Not Started
Requested	17. Current and projected headcounts by business unit	11/11/2025	Not Started
Requested	18. Information data for the in-use facilities for each employee	11/11/2025	Not Started
Requested	19. Assigned work meeting information: building, floor, type (office/workstation, working etc.)	11/11/2025	Not Started

REQUEST FOR INFORMATION

MEASURES OF SUCCESS

WHAT ARE WE SOLVING FOR?

WORK STYLES

- What does a typical 'day-in-the-life' look like for my employees?
- Are there different work styles across/within departments?

EFFECTIVENESS

- What are the current pain points in today's workplace experience?
- How can we support our employees to be more productive?

CHANGE READINESS

- Which emps/depts are already practicing mobile behaviors?
- Will change impact your ability to attract & retain talent?

MISSION & CULTURE

- Does our workplace represent our values and desired image?
- How well is the organization culture reflected in the workplace?

EFFICIENCY

- What is the max capacity of my existing footprint?
- Will I need to acquire more space in order to accommodate growth?

UTILIZATION

- How often are employees showing up to the office?
- Which workspaces within the office are most/least utilized?

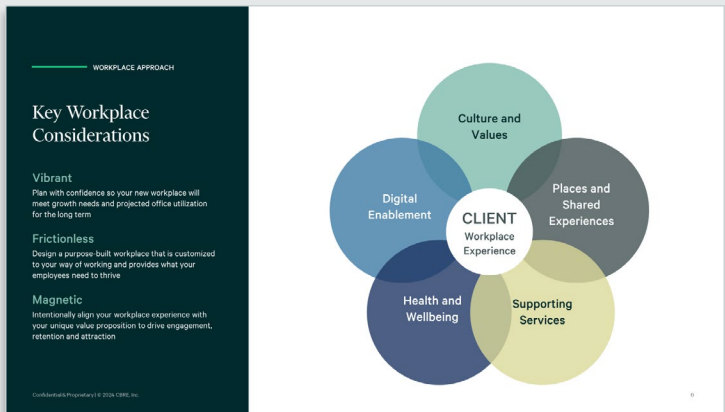
TALENT

- What matters most to my employees and future recruits?
- How do workforces in other markets compare to our current market?

STRATEGY

- How can our space reflect our culture?
- How will different growth forecasts impact our space requirements?

PROJECT KICK-OFF



GOALS AND OBJECTIVES ALIGNMENT

B. Profile Existing Departments

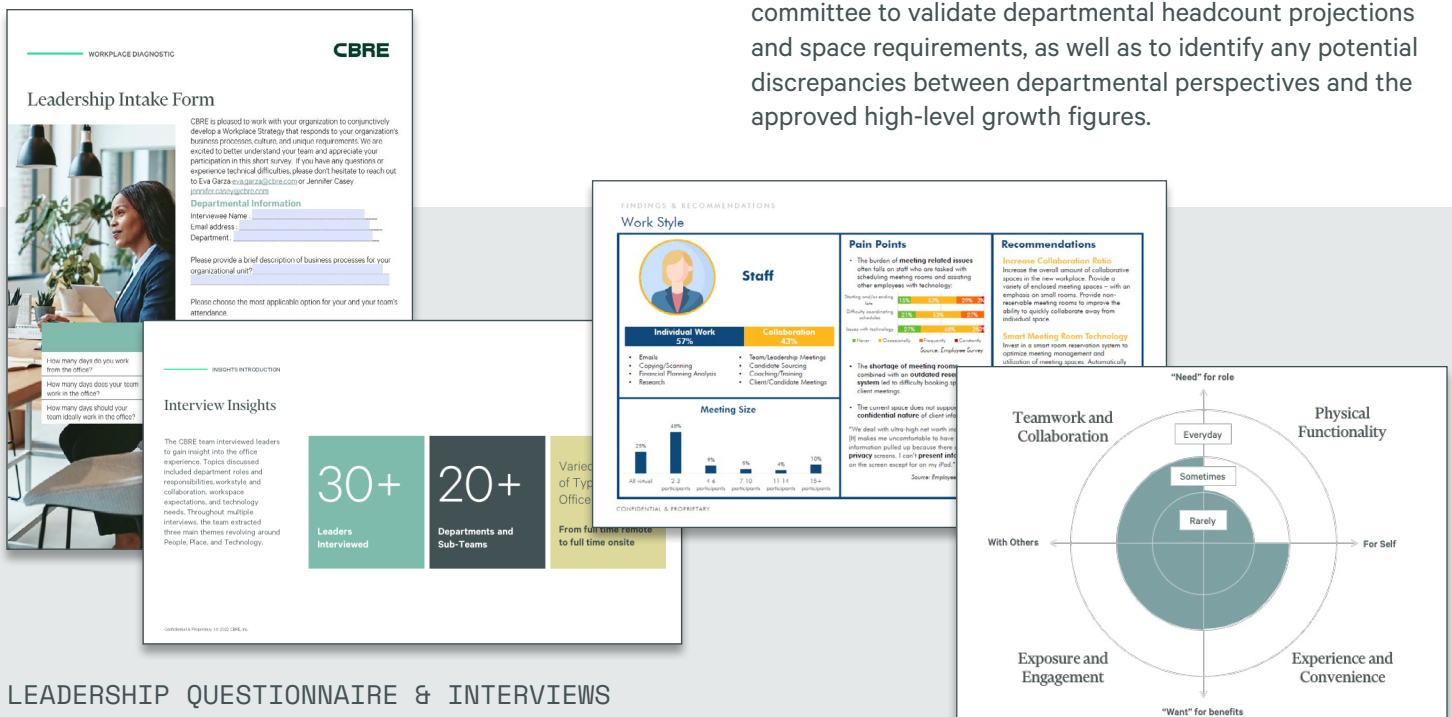
As we develop departmental profiles, we will gather immediate and future requirements cross 14 Board of County Commissioners departments, 9 State of Florida and Elected Officials departments and 2 Charlotte County departments to accurately profile their existing and projected headcount, space requirements, and departmental adjacencies to map departmental needs in aggregate and its impact on future space needs.

Questionnaire

The CBRE Team will prepare and share with the Charlotte County core team a questionnaire for departmental leaders to provide department specific data including current and projected headcount, adjacencies, current and projected workspace needs, collaboration needs, customer / public space requirements, and specialty space requirements. We will use this as a starting point to formulate intentional interview questions and review with the Charlotte County core team to attain their approval prior to distributing this across departmental leaders. These questionnaires shall be distributed by Charlotte County core team members and should be filled out in preparation for departmental interviews.

Leader Interviews (25 estimated)

The CBRE Team will conduct 60-minute, interactive departmental interviews with departmental leads with the goal of understanding workflows, pain points, space needs, evolving business processes, and other recent changes. We will also discuss trade-offs within the workspace in these conversations to inform spatial changes. These interviews will be conducted virtually (via Teams or Zoom) and scheduled by Charlotte County core team members.



C. Develop Uniform Space Standards

During the space standards development phase, we will leverage the established vision and departmental profiles to evaluate Charlotte County’s current space standards. We will benchmark these standards against industry best practices and make necessary revisions to better align with the evolving processes and requirements of each department.

Space Analysis

The CBRE Team will analyze a selection of representative floor plans, covering up to 230,000 square feet, to evaluate existing planning standards, space allocations, and floor plate efficiencies. Additionally, The CBRE Team will assess the functionality of the current spaces, examine team adjacencies, and identify areas that are either underutilized or optimally utilized. The goal of this space analysis is to compare the existing County spaces against industry best practices and pinpoint opportunities for improvement.

Industry Benchmarking & Research

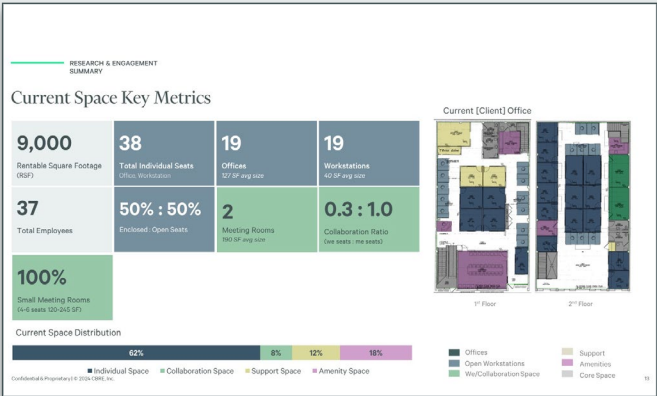
The CBRE Team will benchmark the County’s existing space metrics and space standards and compare with best practices in workplace planning. Elements to be compared include space allocation metrics, design solutions, furniture and technology solutions, planning concepts, and work setting types.

Develop Space Standards

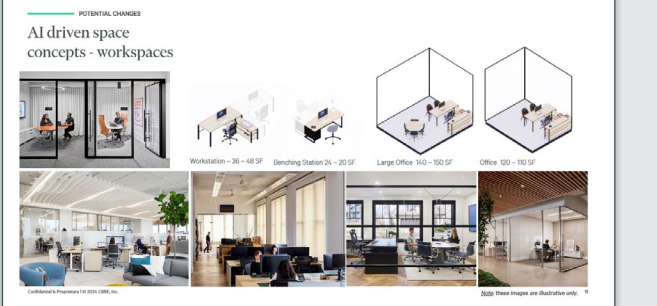
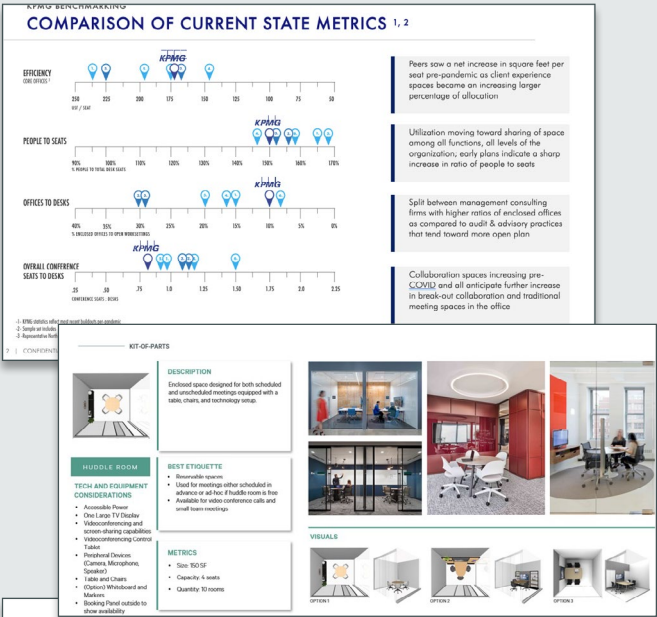
The space standards developed by The CBRE Team for Charlotte County will represent a set of comprehensive planning and space allocation guidelines to support your organization’s future workplace. Standards include unique workstyle profiles and programming guidelines that align to key job functions and departmental needs. In addition, a set of planning principles that easily adapt to changing business needs shall be included. Finally, a “kit-of-parts” to support implementation of the new workplace space planning principles and space standards. This document will define each space type available and include size / dimensions, furniture requirements, and tech/equipment needs.

Steering Committee Progress Review Meeting

The CBRE Team and the Charlotte County core team will schedule a 90-minute progress review meeting with steering committee members to review existing space analysis, industry benchmarks and proposed space standards. This meeting will provide The CBRE Team, the Charlotte County core team and the steering committee with an opportunity to validate findings and proposed standards and build consensus around a common vision for Charlotte County’s facilities.



SPACE ANALYSIS



WORKPLACE SPACE STANDARDS

D. Forecast Future Personnel

In this project phase, we will use the information collected from departmental interviews to outline yearly headcount growth on a departmental basis.

Growth Modeling

The CBRE Team will analyze departmental profile data and steering committee views to project departmental growth over the next 10 years while weighing in the variances between departmental leadership views and approved projections. The CBRE Team's analysis will show department and sub-department detail on a yearly basis and be integrated into departmental profiles. The CBRE Team will also create additional projections through sensitivity analysis. This analysis will present various ranges based on trend data and county growth. To assess county growth, our team will leverage GIS analyses and maps using The CBRE Team's proprietary ESRI-based Dimension system. The findings will be displayed as an interactive map, with layers overlaid on current real estate asset locations, and will also be summarized in a report. The forecasts will be presented to the County for review, with one forecast selected to guide future space needs.

Summary Report

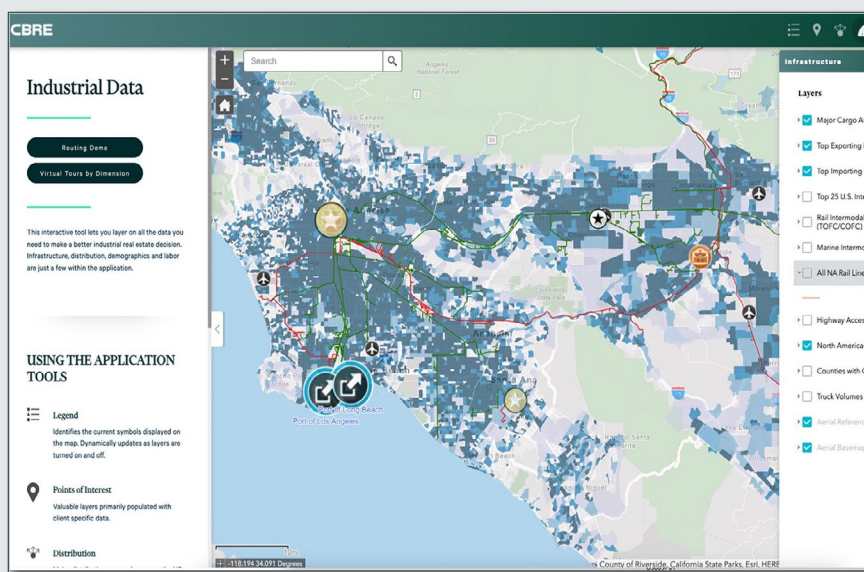
Based on data analysis at the portfolio and departmental level, CBRE will develop a summary report comprising future recommendations.

Steering Committee Preliminary Findings Presentation

The CBRE Team and the Charlotte County core team will schedule a 90-minute preliminary findings presentation with steering committee members to review Dimension modeling, benchmarking and headcount growth modeling. This meeting will provide The CBRE Team, the Charlotte County core team and the steering committee with an opportunity to review findings and build consensus around a common vision for Charlotte County's projected growth.

Our innovative approach is enabled by industry-leading technology.

Market dynamics change rapidly. Our proprietary technologies provide real-time intelligence that produce deeper due diligence with greater speed and accuracy, so that no market change, opportunity or risk is overlooked.



CBRE DIMENSION™

E. Project Future Needs (Gap Analysis)

Develop Department Personas & Space Requirements

Based on the gap analysis and projections developed during this project stage, The CBRE Team will develop department personas and summarize space requirements to illustrate anticipated changes in total space demand arising from new processes across departments in contrast to the existing space.

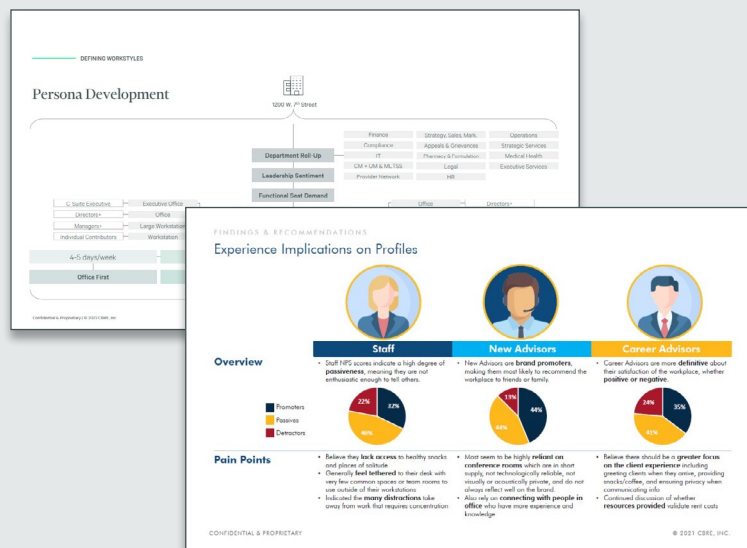
Detailed Space Program

The CBRE Team will create a comprehensive space program based on departmental profiles and headcount growth modeling. This program will outline the required workspaces, collaboration areas, and support spaces for each department and sub-department. It will also include summaries for the Board of County Commissioners, the State of Florida, and Elected Officials, allowing the steering committee to easily understand the total rentable or gross square footage needed for each group.

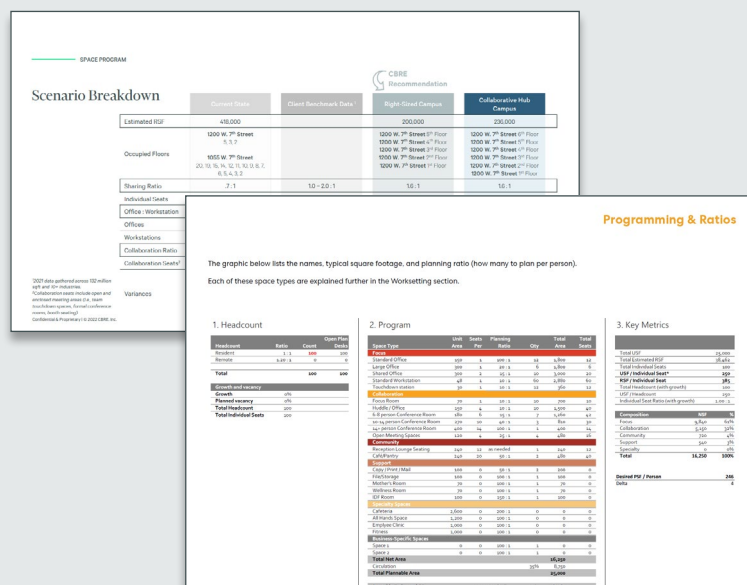
The final recommended program will consider previously established and newly updated space standards, detailing square footage per employee based on their position, role, responsibilities, and functional needs. These standards will be applied to personnel forecasts to determine space requirements through the 2035 planning year.

Gap Analysis

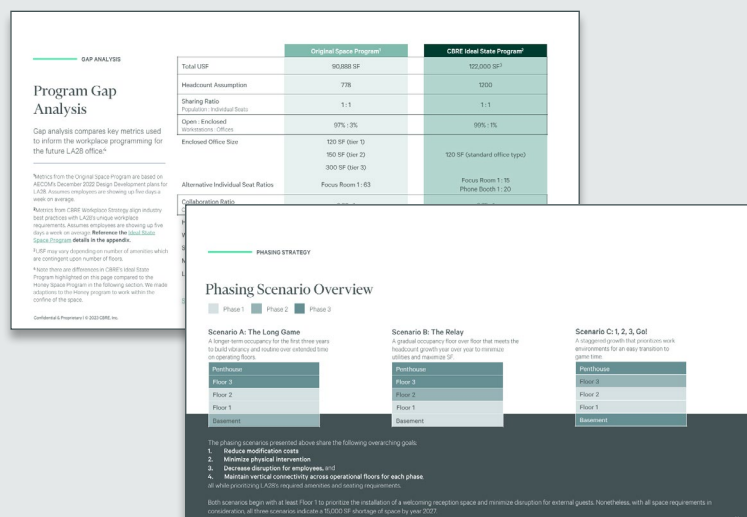
The CBRE Team will conduct a thorough gap analysis based on the detailed outcomes of the space program. This analysis will compare projected future departmental and organizational needs with the current state to identify potential space savings, increases, and other metric changes. We will share emerging trends in the workplace and provide case studies from other counties or cities that are comparable in size, population, location, economics, and demographics. These examples will showcase innovative approaches to addressing the County's space needs. Our findings will highlight both challenges and opportunities. Additionally, we will review the updated space standards to ensure their effective integration into our recommended scenario modeling in the upcoming project phases.



PERSONA DEVELOPMENT



DETAILED SPACE PROGRAM



GAP ANALYSTS

F. Develop Detailed Recommendations

Supply & Demand Analysis

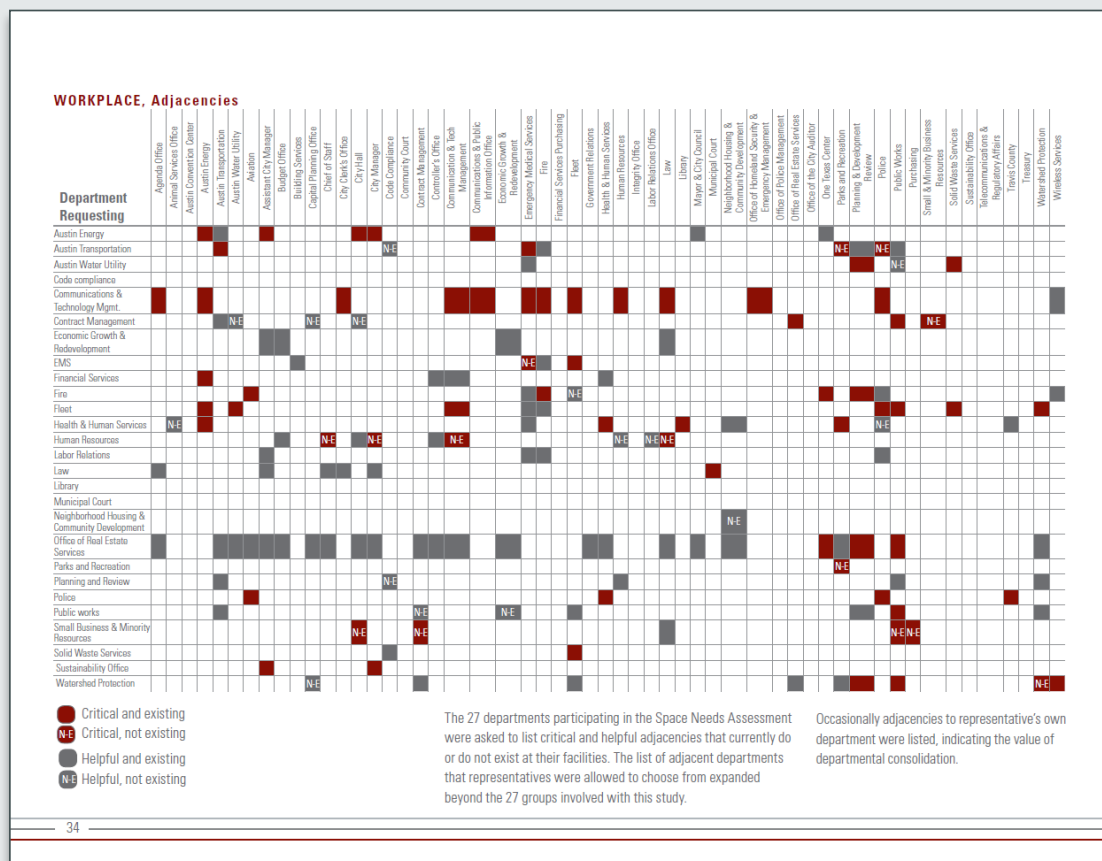
Our scope will include a supply and demand analysis that compares existing space with future expansion needs over 5- and 10-year increments. This analysis will summarize data by building and department, detailing net, gross and/or rentable square footage. It will help identify potential gaps or surpluses in space and provide strategic recommendations to optimize the portfolio's performance and ensure alignment with departmental goals.

Adjacency Mapping

Based on data collected through departmental questionnaires, interviews, and observations, The CBRE Team will create a map of departmental adjacencies to understand the functional relationships and required proximities between departments. This information will be presented in an adjacency matrix that outlines primary, secondary, and tertiary relationships. Additionally, we will highlight relevant topics that may impact the delivery of public services or influence future adjacencies. Factors specifically related to Charlotte County, such as economic, demographic, geographic considerations, and the distribution of resources, will also be taken into account.

Steering Committee Recommendations Presentation

The CBRE Team and the Charlotte County core team will schedule a 90-minute presentation to the steering committee. This will be a synthesis of The CBRE Team's draft deliverable, summarizing space standards, future needs, and recommendations and can be virtual or in-person.



ADJACENCY MAPPING

G. Develop Alternatives To Meet Future Space Needs

Portfolio Optimization and Regionalization Opportunities

The CBRE Team will conduct a thorough evaluation of the existing portfolio to identify strategic alignments with organizational objectives. This process will include assessing regional market dynamics and workforce distribution. We will contrast operational needs and future growth plans, ultimately identifying opportunities for consolidation, relocation, or reconfiguration of spaces to support future needs across the County.

Real Estate Scenario Modeling

Based on identified optimization opportunities and future real estate needs, The CBRE Team will propose alternative real estate scenarios. These scenarios will include a summary of both near-term and long-term projects, along with recommended actions for the portfolio, as well as an assessment of the trade-offs and risks associated with each option. Each alternative will be evaluated against key objectives while considering current real estate market conditions, community impact, and employee health and effectiveness.

We will develop a base case that reflects the status quo, serving as a benchmark for comparison with all alternative scenarios. Potential scenarios may include downsizing existing locations, consolidating multiple facilities into either existing or new locations, selling underutilized facilities or vacant land, or exiting excess space. All scenarios will account for employee commute patterns, existing facilities, and real estate market conditions.

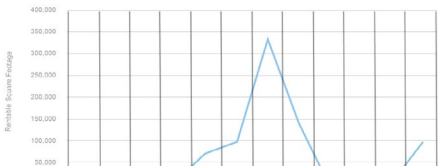
Masterplan Concepts, Blocking & Stacking

To ensure effective planning of the scenarios, The CBRE Team will create blocking and stacking plans that illustrate how departments will be positioned within the final buildings for each scenario. This will include any necessary swing space or interim moves required to implement the preferred scenario.

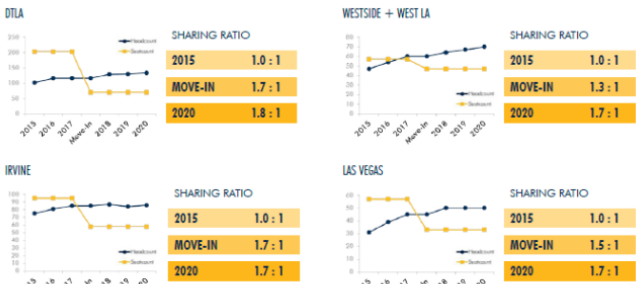
Key Observations and Recommendations

Leased Buildings	Lease Expiration	Square Footage	Occupying Departments
100 West Riverside Drive	7/31/2020	2,654	PWD, WPD
6202 E. Ben White	3/31/2026	59,494	APHD
6202 E. Ben White	3/31/2026	9,868	EDG, CPO, HRD, ACO, ACD
6202 E. Ben White	6/31/2026	127,406	DSD, AE
919 Congress	2/28/2026	2,312	IGRO
919 Congress	12/14/2025	4,013	Treasury
Austin Energy Building	9/30/2023	71,020	AE, TARA, OPM, SMHR
Barton Oaks	8/31/2024	25,137	ATD
Bergstrom Technology Center	3/31/2020	92,050	Mun. CL
Bergstrom Technology Center	9/31/2025	216,000	Fleet, PWD, CTM, APH
Brodie Oaks Center	4/30/2022	3,749	EDD
Cameron Technology Center	12/31/2025	66,750	ATD
Downtown Community Court	6/31/2020	4,906	Mun. CL (DACC)
HACA Building	10/31/2024	45,554	CTM
Prosecutors	3/14/2022	2,830	Prosecutors
Silicon Laboratories Building	9/30/2019	16,566	Auditor
Snell Building	9/1/2021	7,174	Equity Office, HRD, CPIO
Street Jones Building	12/31/2024	26,456	NMCO
Travis County Administration Building	2/28/2019	4,934	Vacated
Travis County Administration Building	2/28/2019	1,707	Vacated

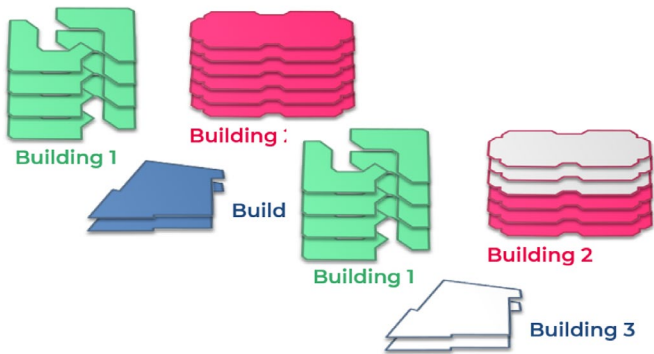
Lease Expiration by Year



SCENARIO IMPLICATIONS SUPPLY AND DEMAND



REAL ESTATE SCENARIO MODELING



MASTERPLAN CONCEPTS, BLOCKING & STACKING

H. Recommended FY24/25 Charlotte County Strategic Master Space Plan Concept And Implementation Strategy

Financial Modeling & Cost Estimation

The CBRE Team will create a comprehensive financial model for the preferred scenarios, outlining the total implementation costs over a 10-year period. This model will enable the County to assess the financial implications of various projects included in the real estate scenarios. Each scenario will be compared against the status quo, creating a compelling business case to support the decision-making process for the long-term solution.

Develop Implementation Strategy

Based on all data gathered to date and steering committee vision, The CBRE Team will develop a phased implementation strategy for departmental workplace changes, roll-out of new space allocation standards, attainment of ideal adjacencies and any necessary building restacks and space reconfiguration. This strategy will be developed based on priorities set forth at project inception and shall guide design and construction partners as they navigate future project milestones.

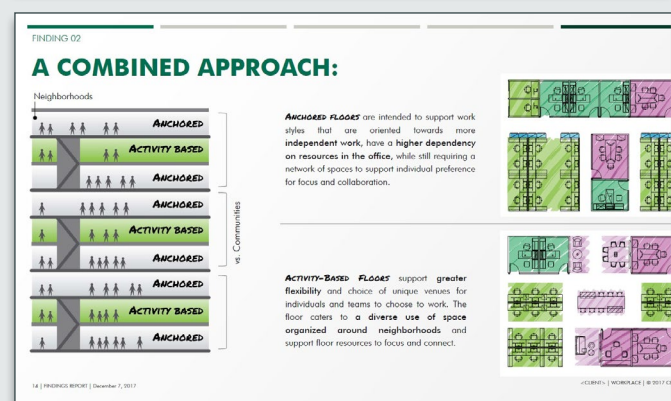
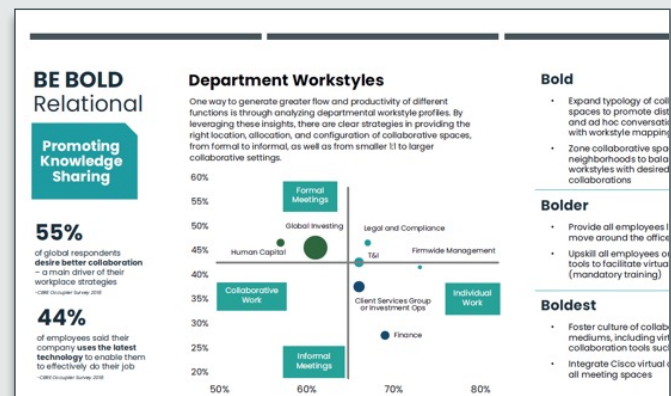
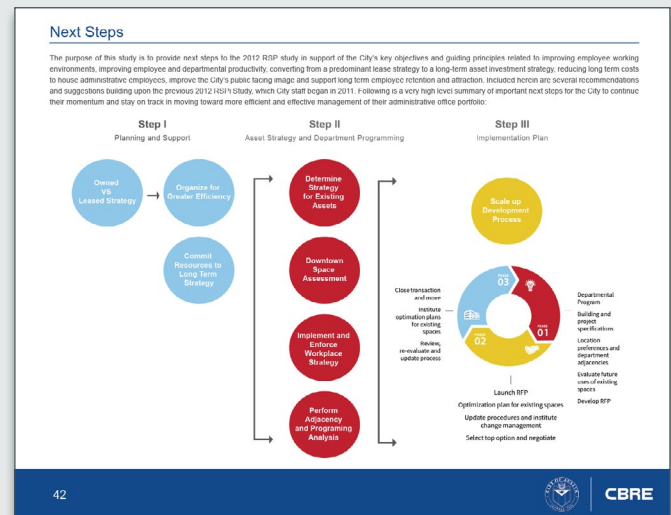
Develop Recommendations & Final Report

We will produce a comprehensive recommendations report that encompasses all key strategic master plan concepts and the proposed implementation strategy. This report will include recommendations related to organizational goals, workplace strategy objectives, opportunities for more efficient planning, and suggested targets for efficiency and planning metrics. Additionally, it will identify ways to enhance culture and experience through changes in services, technology, policies, and protocols.

The final report will also provide a cost analysis for implementing the preferred scenario, ensuring a real estate solution that meets Charlotte County's future needs. Furthermore, we will include a project schedule in the form of a Gantt chart, outlining all tasks, workshops, review periods, and presentations with the Board of County Commissioners, staff, and the public.

Steering Committee Final Presentation

The CBRE Team and the Charlotte County core team will schedule a 90-minute final presentation to the steering committee. This will be a synthesis of The CBRE Team's final deliverable, summarizing alternative scenarios, and recommendations and can be virtual or in-person.



FINDINGS & RECOMMENDATIONS

VI. Present Examples Of Recently Accomplished Similar Projects Within Five (5) Years.

A. Describe projects to demonstrate.

1. Utilization of a systems approach to plan for an organization with multiple departments and stakeholders
2. Utilization of statistical analysis to forecast implications of population growth and regionalization needs to develop a gap analysis
3. Provided implementation plans to address spatial growth, and regionalization, while providing a standards framework and basis of design unique to departmental needs while conforming to an overall organizational uniformity.

Butler County, OH (2022-2023)

Butler County had a mix of owned and leased assets that they desired to understand areas for efficiencies, cost reductions and improvements to provide employees and the public access to safe, healthy and productive areas to carry out critical duties. The County engaged CBRE to complete a space utilization study of their property inventory to identify existing or lacking synergies, redundancies, efficiencies and economies of scale for their future space planning.

Among the County's departments, there are a number of areas where there is opportunity for improvement of space, public touch points or location of departments for adjacencies in the ways they work or the way they interact with the public. The County also has some aging buildings, so there was a desire to optimize and potentially improve or divest of some locations.

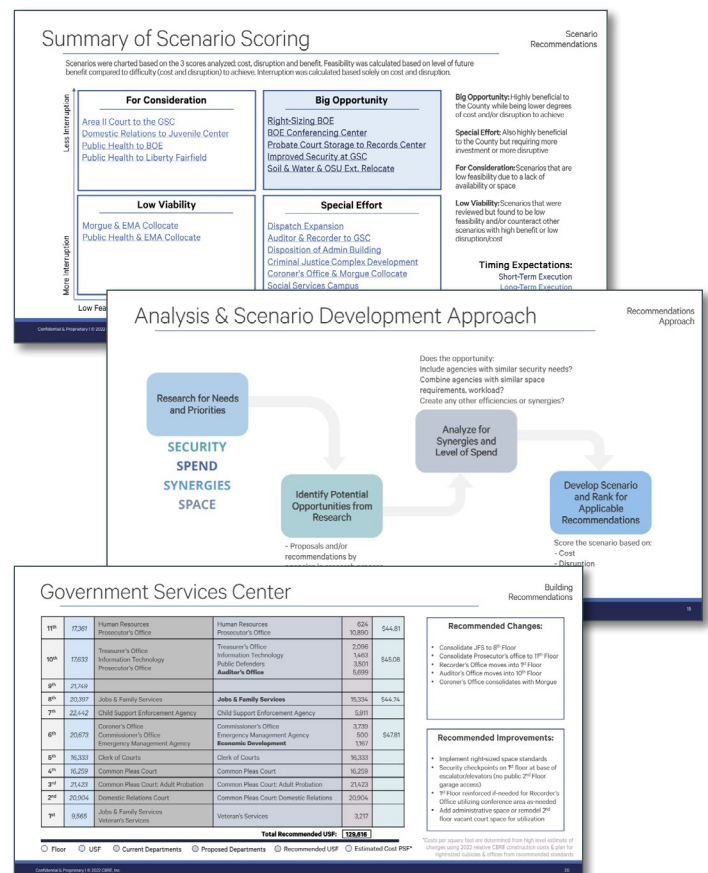
CBRE conducted a space analysis of the included sites, on-site building observations, focus groups and leadership interviews. CBRE developed and understanding of the efficiency of space utilization, needs for additional or implemented security, synergies between departments through internal or external drivers and an overarching requirement for some baseline improvements. The opportunities for adjacencies or overlaps in internal or public touchpoints were also developed through the engagement activities where CBRE was able to identify 28 interconnections between agencies.

Through research, analysis and strategizing, CBRE was able to develop overarching space standards to implement across the County's portfolio of administrative spaces.

CBRE also provided 17 recommended scenarios, developed through the research, ranked by feasibility (determined from timing and cost implications) and interruption to the business. Each of the recommended scenarios identified areas for efficiency – either through improvements to buildings, creating adjacencies between departments

or improving space utilization – and included high level estimates for cost, disruption to the impacted space or agency and benefit to the County overall.

Lastly, CBRE provided building-level before and after views of the recommended scenarios including an estimated cost per square foot to achieve. These showed an overarching cost estimate as well as the recommended future-state of each building and where the recommended changes or improvements would occur. These also provided location views of where efficiencies would be made amongst agency proximity – both to internal processes as well as public touch points.

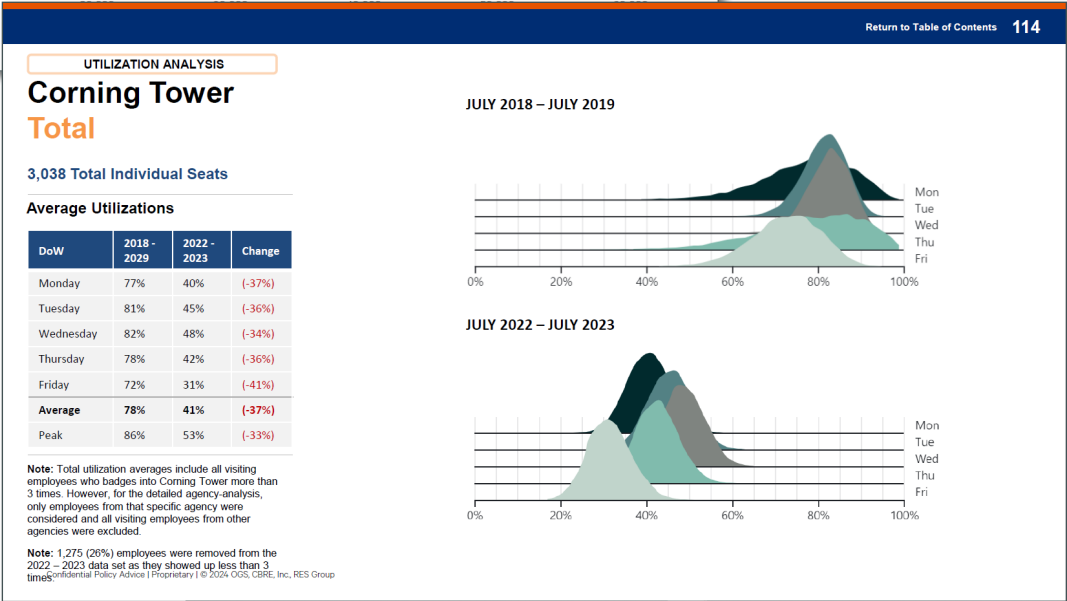
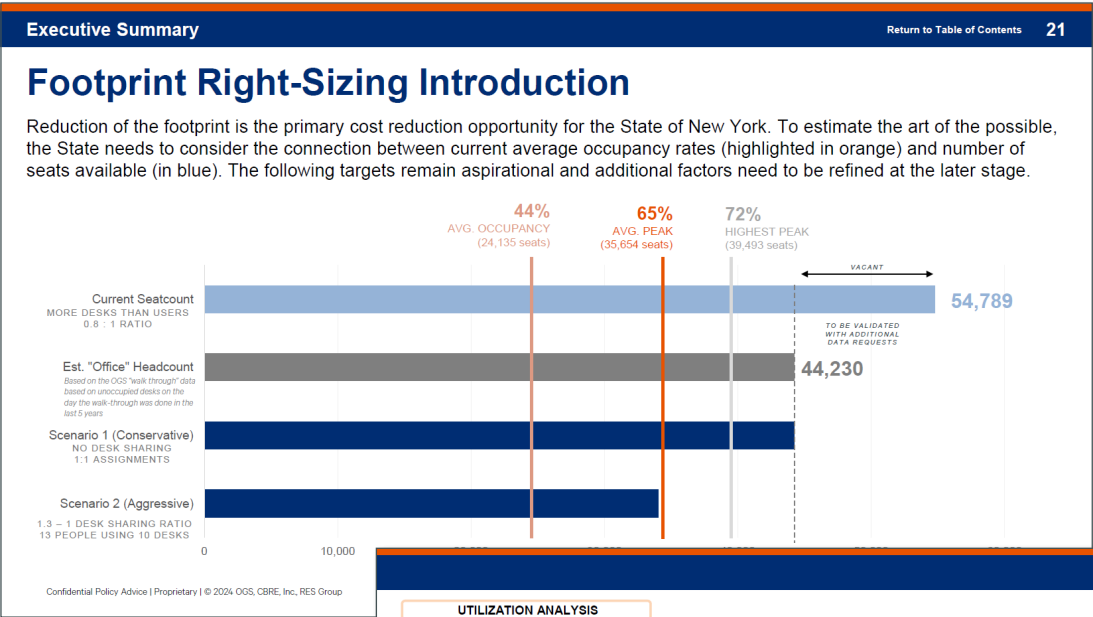


State of New York (2024 – 2025)

The State of New York hired CBRE to conduct a comprehensive evaluation of the State’s portfolio and utilization of office space. The State sought to identify opportunities for consolidating space, and new approaches to providing space to dozens of state agencies, with 45,000+ employees across 14M SF. The State aimed to drive efficiency, modernize the office experience, and reduce emissions from State operations. CBRE faced the challenge of understanding the needs of diverse agencies within the state’s organization, and of evaluating a sprawling portfolio of owned and leased property in ten regions across the state.

CBRE conducted comprehensive research, including portfolio analysis, building utilization analysis, industry benchmarking, leadership interviews, and employee focus groups. CBRE identified a suite of opportunities for improving the workplace experience and utilization. CBRE provided two portfolio optimization scenarios, based on varying levels of hybrid work. Both scenarios allowed for significant consolidation. The more aggressive scenario involved desk sharing any densifying space across the portfolio, while the more conservative scenario retained 1:1 seating which is the State’s current norm. The recommended strategies are expected to reduce the state’s rent obligations by 10-30%.

To drive implementation and to stimulate support for the approach, CBRE developed comprehensive roadmaps for pilot projects, along with program sustainment support. CBRE further recommended policy and organizational changes to support best-in-class real property management and service delivery.

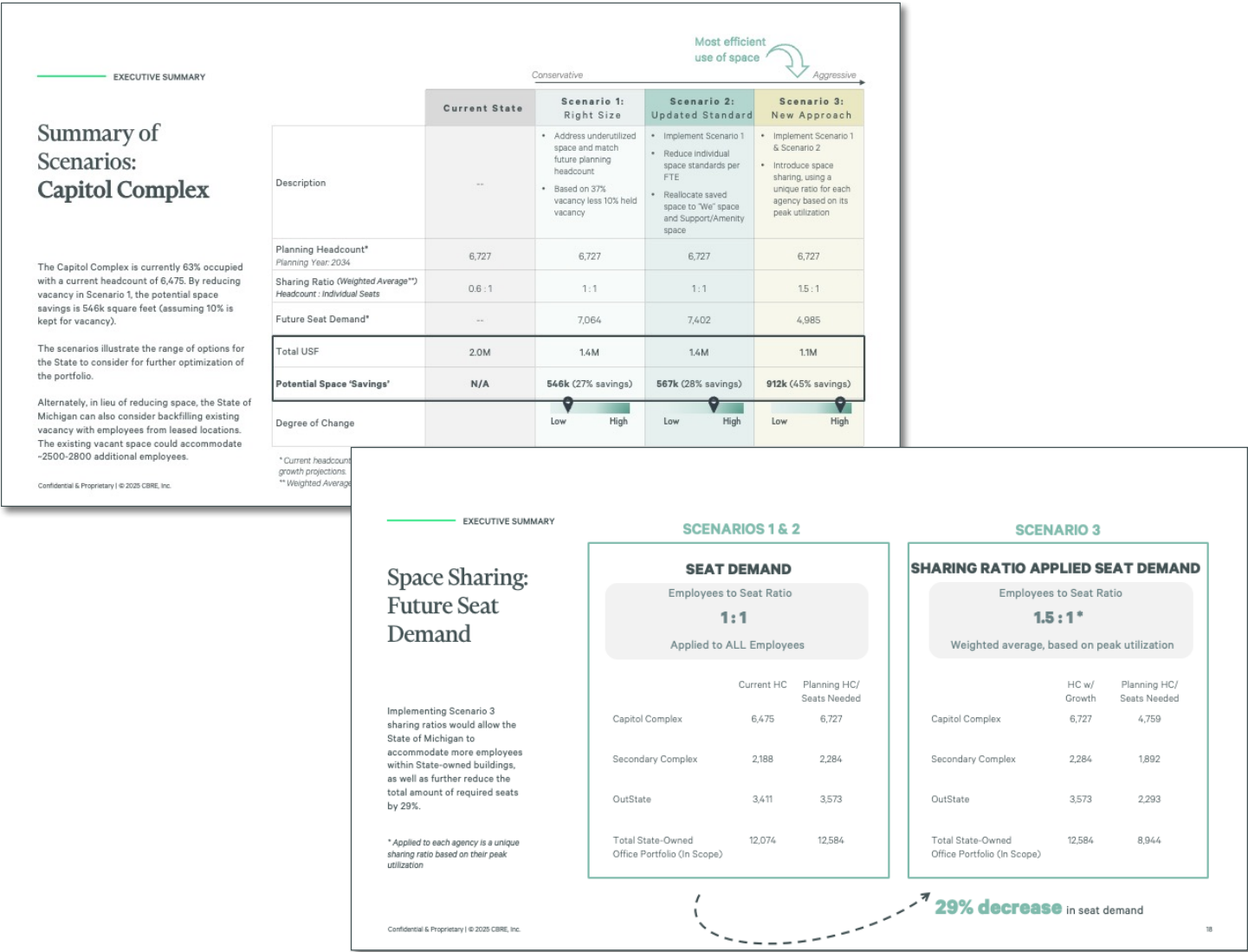


State of Michigan (2024)

The State of Michigan engaged CBRE to conduct a Building Occupancy Study and recommend a long-term roadmap and vision for flexible, efficient, achievable, and affordable management of the real estate portfolio. Right-sizing the State's footprint can increase efficiency, reduce costs, and improve service delivery, with significant savings in operating expenses and rent. Challenges the state faced included low utilization rates, inefficient space standards, and challenges with space allocation due to the hybrid work model.

The CBRE Workplace team conducted various qualitative and quantitative research activities, including facility tours, space analysis, building utilization reviews, interviews, surveys, and visioning sessions to inform the State of Michigan's space requirements and optimal occupancy scenarios for the future workplace. Findings indicated that the State of Michigan's space standards for individual space types are consistently higher than best practice targets for the public sector. There is wide variability in space sizes, creating inefficiencies across the portfolio. Additionally, current office space utilization is low, with a 35% overall workstation vacancy in the State-owned portfolio.

Key recommendations for improving utilization included increasing the variety of spaces available to employees, providing access to both open and enclosed individual and collaborative space types, implementing seat sharing for select departments, and ensuring equitable access to all collaboration and amenity spaces. Additionally, CBRE made recommendations for developing and socializing these standards across the State of Michigan to help create a more consistent and effective hybrid work environment.



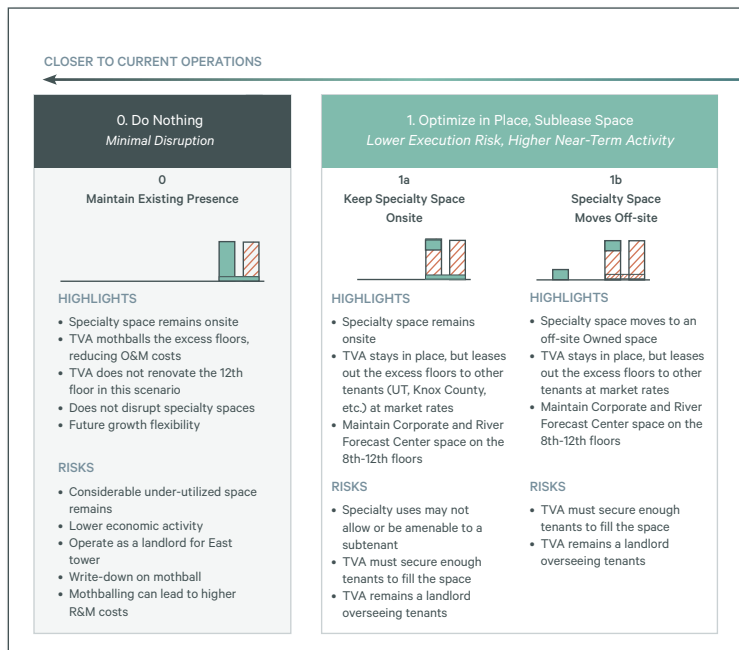
Tennessee Valley Authority (2023 – 2024)

Following a competitive procurement process in late 2022, CBRE was selected by TVA to provide comprehensive real estate consulting services to align TVA's real estate portfolio with its strategic direction and utilize the real property portfolio efficiently and appropriately. The engagement consisted of two workstreams: (1) Detailed space programming, occupancy scenario development and financial analysis for TVA's largest office facilities (KOC & COC) and (2) Valley-wide Occupancy Analysis & Portfolio Optimization (57 assets, 2.4m SF)

To support TVA's objectives, CBRE's comprehensive real estate strategy covered several key areas, including:

1. Future space Needs assessment through the engagement of all Business Units to develop gather unique requirements and business line profile based on hybrid work policies, utilization and criticality of functions
2. Detailed space programming for TVA's largest campuses in Chattanooga and Knoxville (totaling ~1.9m RSF of space) applying space standards developed for both office and specialty spaces
3. Development of long-term occupancy scenarios for both campuses evaluating own versus lease options and modeling financials for the scenarios developed
4. Identifying optimization opportunities for other real estate assets across the Tennessee Valley including consolidations, relocations, disposal of under-utilized assets and other regionalization strategies
5. CBRE also led an RFP process to replace the existing Chattanooga campus with a new Chattanooga Collaboration Center (CCC).

Throughout the process, CBRE worked closely with the TVA team to analyze, develop, and test several scenarios, which ultimately led to a final set of recommendations including a proposed new Chattanooga Collaboration Center which significantly reduces TVA's footprint by 62%, and will enable the strategic re-use of the downtown area for redevelopment purposes. Similarly, a 48% reduction in space is recommended for the Knoxville Office Complex. CBRE also identified assets across the Valley that can be exited to consolidate functions in order to create more efficient operations.



		(Cost) / Benefit Impact	Operational Impact			Footprint Impact
		Total 15 Year NPV	Landlord Responsibilities	Sale Risk	Footprint Right Sizing	Occupied Footprint Reduction
0. Do Nothing	0. Status Quo: Remain on entire campus for long-term occupancy	▲	-	-	-	-
1. Optimize In Place Sublease Space	1a. Keep Specialty Space On-site	▲	▲	▶	▶	▼
	1b. Specialty Space Moves Off-site	▲	▲	▶	▼	▼
2. Optimize in Place, Sell and Leaseback (Investor)	2a. Keep Specialty Space On-site	▲	▼	▲	▶	▼
	2b. Specialty Space Moves Off-site	▲	▼	▲	▼	▼
3. Optimize in Place, Sell and Leaseback (Owner Occupier)	3a. Keep Specialty Space On-site	▼	▼	▶	▼	▼
	3b. Specialty Space Moves Off-site	▲	▼	▶	▼	▼
4. Sell and Leave KOC Entirely	4a. Relocate Entire Operation Together	▲	▼	▲	▶	▼
	4b. Relocate Specialty Space and Corporate Separately	▲	▼	▲	▼	▼



Charlotte Harbor Event & Conference Center, Punta Gorda, FL

OWNER

Charlotte County Government
Jim Finch
General Manager
T: 941.743.2425

SIZE

44,000 GSF

CONSTRUCTION COST

\$19.3M

COMPLETION DATE

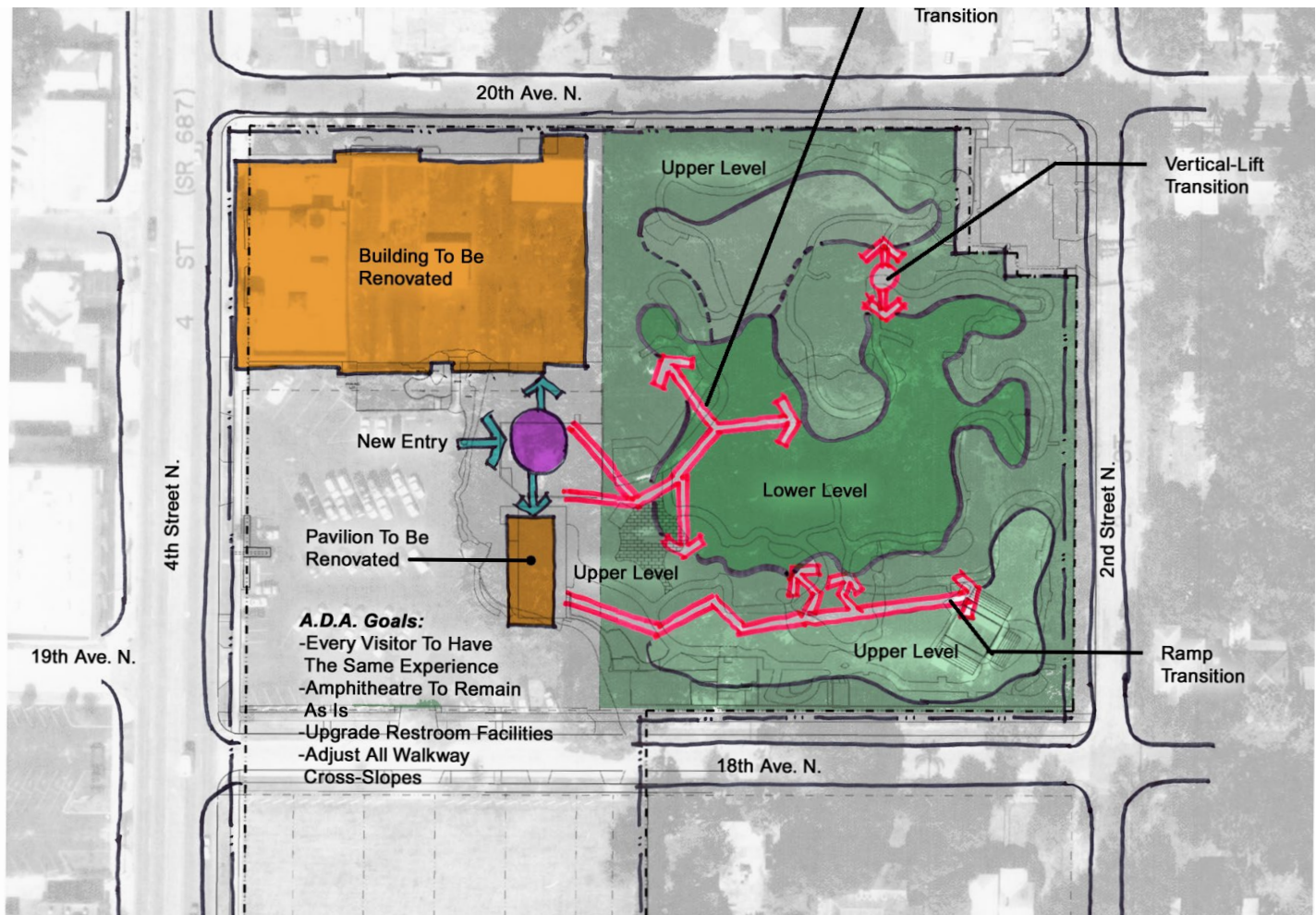
2010
Miscellaneous improvements
since 2011

Harvard Jolly master planned this 10 acre waterfront complex and provided architectural and engineering design for the implementation of the first two phases.

The master plan included creative solutions to provide a visible and physical link from the downtown to the site. In addition to providing a 20,000 net square foot multi-purpose Event Hall and multiple break-out spaces, the design also included providing a beautiful outdoor civic space for a variety of outdoor activities to engage the Center with the adjacent Harborwalk.

Located on the shore of the Peace River in Punta Gorda, the Charlotte Harbor Event and Conference Center is the county-wide focal point for arts and entertainment. The facility fits seamlessly into the city's existing architectural style and is a key piece of the makeover and revitalization of Charlotte County after the area was devastated by Hurricane Charley.

The Event and Conference Center provides 44,000 square feet of flexible space for various types of events including consumer expos and trade shows, theatrical performances, sports tournaments, regional/national conventions, and weddings. While featuring a seating capacity of up to 2,100, smaller meetings can be accommodated by four breakout rooms. A park surrounding the building showcases the waterfront and provides space for outdoor events.



Sunken Gardens Master Plan, St. Petersburg, Florida

OWNER

City of St. Petersburg
Raul Quintana, City Architect
PO Box 2842
St. Petersburg, FL 33731
T: 727.893.7913
E: jose.quintana@stpete.org

SIZE

8.6 acres

CONSTRUCTION COST

\$3.4M

COMPLETION DATE

2000 - present

Originally constructed in 1926, the existing building was designed as an open air public market. In 1940, the Coca-Cola Bottling Company of St. Petersburg retained architect William B. Harvard, Sr., founder of Harvard Jolly Architecture, to transform the building for use as a bottling plant, offices, and a public auditorium. This began a long-term collaboration between Harvard Jolly and the attraction.

After years of decline and change of ownership, the property was purchased by the City of St. Petersburg in 1999. The city hired Harvard Jolly to develop a master site plan that integrated the gardens, Great Explorations (an interactive children's museum), gift shops, and public parking. The project also included designing a complete exterior restoration and interior renovation that returned the building to its original Mediterranean Revival style.

Working together with city staff, Sunken Gardens, and Great Explorations, Harvard Jolly designed a unique entrance and lobby that all visitors of the building share. Portions of the Sunken Gardens botanical walkway path were also redesigned to meet current accessibility code requirements. The ultimate result of this design and planning effort is a seamless integration of the previously disjointed elements on the site into a coordinated range of experiences for visitors.



City Of Zephyrhills - City Hall & Master Plan, Zephyrhills, FL

OWNER

The City of Zephyrhills

SIZE

16,000 SF

CONSTRUCTION COST

\$6.45M

COMPLETION DATE

2018

The City of Zephyrhills tasked the Harvard Jolly team with developing a space needs analysis and master plan for a New City Hall. Our findings verified that the existing City Hall is disorganized and lacks the required space to function properly. As a result, many of the city's key departments are spread out around the city in various locations, and will need room for expansion based on anticipated growth over the next five years.

Upon completion of the space needs analysis, Harvard Jolly studied several options for locating the new building on the existing site. In order to maintain a proximity with the library, and work best with the existing site grading and drainage, we confirmed that the building would be best sited in the same location as the existing building. Harvard Jolly designed a plaza to enhance the connection between the City Hall and library, and to create a civic complex that incorporates the City Hall, library and fire station.

The City Hall building was designed with an L-shaped configuration that semi-encloses the plaza and simultaneously addresses the main street and provides a civic entrance at the plaza / parking lot side. The two-story portion houses all of the City's offices, and the one-story portion is a multi-purpose Council Chambers that along with the plaza, can also be used for City events or rented out to generate revenue.

The building is designed so that the Chambers, lobby and public restrooms can be accessed outside of regular business hours, while the offices can be closed and secure.

VII. Describe Your Experience And Capabilities In The Following Areas

A. Familiarity with telework and hybrid work

CBRE offers extensive expertise in helping clients navigate the future of work with remote and hybrid work environments. Leveraging our deep understanding of real estate and workplace strategy, CBRE helps organizations optimize their office spaces, enhance employee productivity, and foster collaboration. Capabilities include workplace assessments, space utilization analysis, and technology integration to support flexible work arrangements. Additionally, CBRE provides strategic planning services to align real estate portfolios with evolving workforce needs, ensuring organizations can adapt to changing work dynamics while maximizing operational efficiency and employee satisfaction.

About CBRE Workplace Strategy

The workplace has the power to create positive emotional connections between people, their work and the organizations they work for. Great workplaces are destinations that bring people together around a common purpose, inspire them to impact through their work and make it easier to get tasks done. CBRE's Workplace practice is focused on defining strategies that leverage your workplace to optimize employee and business performance. Our experience includes adaptable, flexible work environments supported by thoughtful solutions that enable collaboration, inspiration, and connection. We provide a holistic approach to integrating space, technology, services, and organizational design into your workplace strategy through to the change management required to implement it.

1.5K

Organizations served

1M+

People positively
impacted by our
workplace efforts

250K+

Survey responses
analyzed

5:1

Value-to-fee

Insights that Matter

Our intelligence supports talent and real estate strategies that deliver optimized outcomes.

To access CBRE's latest insights visit:

www.cbre.com/insights

Relevant Workplace Strategy Thought Leadership pieces for Charlotte County

- 2024-2025 Global Workplace & Occupancy Insights: [read here](#)
- 2024 Americas Office Occupier Sentiment Survey: [read here](#)
- The Math Behind the Hybrid Workplace: [read here](#)
- Where to Begin When Considering Culture: Purpose, People and Performance: [read here](#)

B. Programming and Master Planning

CBRE Workplace Solutions is at the forefront of redefining work environments, offering strategic, research-driven, and user-focused workplace solutions. With **nearly 300 successful programming and space planning projects** completed in the past three years, our extensive expertise in workplace programming and space planning is unparalleled. Our dedicated team of over 250 workplace strategists, 150 designers, and 650+ occupancy managers collaborate to deliver comprehensive, innovative solutions from strategy to execution. By employing user-centric, data-driven, and holistic approaches, we create vibrant and efficient spaces that align with each client's unique goals and long-term growth aspirations, ultimately fostering Future-Ready Workplaces.

C. Regionalization of services

CBRE's Location Intelligence service line offers a comprehensive suite of tools and expertise designed to forecast future needs for our clients. By leveraging advanced data analytics and geographic information systems (GIS) through our proprietary platform, CBRE Dimension™, we provide strategic location analysis that enhances decision-making. Our approach combines exclusive data, in-depth market knowledge, and specific client requirements to elevate the art of site selection and real estate analysis.

Our capabilities encompass demographic trend analysis, competitive landscape assessments, and site selection optimization. By integrating extensive market insights with cutting-edge technology, we empower clients to identify growth opportunities, assess potential risks, and make informed real estate decisions that align with their long-term business objectives. This forward-thinking methodology ensures that our clients are well-equipped to navigate evolving market dynamics.

While our Dimension tool is a critical component in determining optimal locations, our portfolio strategists play a vital role in evaluating the financial implications of various scenarios. This comprehensive analysis ensures that our clients consider all aspects of their future real estate decisions, leading to strategies that are both effective and sustainable.

D. Evaluating current governmental operations

CBRE is a trusted partner of government entities across multiple business lines including Consulting, Transaction Management, and Design. We have exceptional performance and reputation with the public entities we serve. We have developed effective solutions for many county and state agencies and recently completed engagements spanning a wide range of consulting services for government clients in Maryland, Minnesota, Ohio, Florida, and New York. This experience gives us insight and familiarity with the strategies and processes that work best for public clients, the challenges you commonly face, and the importance of executing transactions at the highest standard and value.

Given the potential for public and political scrutiny, decisions should be transparent, well-supported by facts and research, and thoroughly vetted. Our meticulous and collaborative Real Estate Optimization Planning process and comprehensive deliverables have proven highly effective in achieving these objectives. Having multiple business units—each with their own specific needs and requirements—creates a need to establish buy-in while building a strategic real estate plan. We achieve this through an intensive consensus-building approach, including interviews, milestone meetings, focus groups, etc.

E. Forecasting future needs

Most governments we have worked with have had or expect a significant percent of their workforce to retire in the next five to ten years. This means any real estate decision must ensure access to the next generation of the workforce. Labor availability and quality is a key component of our work.

Our consultative approach to forecasting space needs begins with establishing a baseline using existing supply. We gather insights on headcount and service growth from key stakeholders while considering both internal and external factors that may influence growth. Once we have a clear understanding of future growth projections, we model supply and demand across various scenarios to identify potential gaps in the current real estate supply. This analysis enables us to develop tailored real estate strategies that address our clients' short-, medium-, and long-term needs

F. Comparative analysis

Our clients frequently request our insights to determine the effectiveness of various strategies and to identify potential pitfalls to avoid. CBRE has extensive experience in conducting comparative analyses across diverse real estate segments. Our capabilities encompass thorough market research, data analytics, and property valuation, enabling us to benchmark performance, assess market trends, and identify opportunities.

Including comparative analysis as part of a broader real estate strategy is essential for making informed decisions. By systematically evaluating how similar organizations have performed, we can uncover valuable lessons and best practices that inform our clients' strategies. This analytical approach not only highlights potential risks but also reveals opportunities that may not be immediately apparent.

With a skilled team of experts and advanced technology tools, we efficiently analyze large data sets, drawing meaningful comparisons and generating detailed insights. We explore various 'what-if' scenarios, providing our clients with a comprehensive view of their options. This rigorous methodology ensures our clients feel confident that we have thoroughly examined all possibilities, leading to well-informed decisions regarding real estate acquisitions, dispositions, consolidations, or even whether to own or lease. This type of analysis is what we do every day and forms a critical part of our real estate strategy and master planning assignments.

G. Local government industry standards

CBRE is a trusted partner of government entities and we have exceptional performance and reputation with the public entities we serve. With experience in the commercial real estate needs of the public and higher education sectors, we have developed effective solutions for many state, county and local agencies like Charlotte County. This experience gives us insight and familiarity with the strategies and processes that work best for public clients, the challenges you commonly face, and the importance of executing transactions at the highest standard and value.

Harvard Jolly | PBK has a long-standing relationship with Charlotte County, working closely with county officials to ensure that new facilities align with their industry standards, operational requirements, and long-term planning goals. The county places a strong emphasis on functionality, durability, and adaptability, requiring architects to incorporate cost-effective, sustainable design solutions that support both current and future community needs. Our team has successfully navigated Charlotte County's facility design standards, integrating energy-efficient materials, hurricane-resilient structures, and modern, flexible spaces that enhance public services. By adhering to rigorous planning and approval processes, we ensure that every project meets local building codes, funding requirements, and operational expectations.

Charlotte County also prioritizes stakeholder engagement, requiring architects to work closely with county leadership, department heads, and community groups to develop facilities that serve diverse populations. Whether designing libraries, municipal buildings, or public safety facilities, our approach includes programming studies, space utilization analysis, and phased implementation strategies to optimize efficiency and longevity. Harvard Jolly | PBK understands that Charlotte County values forward-thinking designs that maximize functionality while remaining fiscally responsible, and we remain committed to delivering high-quality, innovative solutions that meet these expectations.

VIII. Volume Of Work – Total Of Payments Received From County Within The Past 24 Months*

\$0 - \$49,999	5 points
\$50,000 - \$99,999	4 points
\$100,000 - \$199,999	3 points
\$200,000 - \$349,999	2 points
\$350,000 - \$499,999	1 points
\$500,000+	0 points

*Based upon information provided on Proposal Submittal Signature Form, Magnitude of Charlotte County Projects

CBRE does not have payments from Charlotte County in the past 24 months to report.

IX. Location

Describe the Prime and Sub-Consultants responsiveness as it relates to the firm’s location to the project.

At CBRE, we understand that strategically positioning our team members is key to enhancing our responsiveness and effectiveness in delivering the Charlotte County Strategic Master Plan Development. To this end, we have partnered with Harvard Jolly | PBK, a consultant located in Fort Myers, FL, in close proximity to the project site. This local presence enables immediate communication and faster turnaround times, fostering improved collaboration with Charlotte County stakeholders.

Additionally, our Project Co-Lead and Project Manager, Eva Garza (prime consultant team), is based in Miami, Florida, just a four-hour drive from Charlotte County. This arrangement facilitates prompt communication and site visits. The diverse geographic representation of our team brings a wealth of experience and perspectives while ensuring a strong local connection to the project.

X. Litigation – Have You Been Named As A Defendant Or Co-Defendant In A Lawsuit In The Last Five Years

If so, describe circumstances and outcome, including Case Number, Case Name and Court.

As a global firm with 130,000+ employees, CBRE is occasionally involved in litigation incidental to our business. As a public company, any material litigation is disclosed in our SEC filings. No litigation where CBRE is currently a party, if decided adverse to the company, is likely to impact CBRE’s ability to perform for Charlotte County.

XI. Minority Business

Certified MBE, Sub-Consultants Certified MBE, and/or Non- Certified MBE.

CBRE is not certified as a MBE firm, however we are committed to fostering a diverse, equitable and inclusive environment where our workforce reflects the communities in which we live and work, and everyone feels safe and belongs.

Our people are critical to the success of our company. We embrace individuals from various backgrounds and with diverse perspectives and skill sets to realize the goals of our organization. To better understand the makeup of our workforce, we encourage employees to voluntarily and confidentially self-identify attributes that contribute to diversity. Employees may provide demographical information, including gender and gender identity, race and ethnicity, LGBTQ+ identity, disability and military or veteran status. In the U.K., we also encouraged employees to share more about their social mobility (e.g., schooling and socioeconomic background) and religion. In accordance with local laws, we are working to expand the countries where we collect and report diversity attributes beyond gender. Data and innovation drive our ability to prioritize resources, implement targeted interventions and monitor progress.

We measure how we're strengthening our inclusive culture by analyzing our employee engagement survey to address areas of opportunity and recognize progress. As a part of the survey, we created an Inclusion Index—a subset of questions that ask colleagues about their perspectives on belonging (feeling safe, valued and heard). In 2023, our DE&I dimension score ranked in the top three at 78%, improving by 5 points since its first inclusion in the 2017 survey.

Additionally, input from the more than 25,000 members of our Employee Business Resource Groups (EBRGs) also inform and contribute to our DE&I strategy for cultural change at the enterprise and regional levels.

To track our progress in increasing the diversity of our workforce, we closely monitor results of our ongoing initiatives to evaluate whether expansion is needed. At year-end 2023, 33.5% of our global management are women. Our executive leadership—the seven leaders who report directly to our CEO—include two women (28.6%) and three individuals (42.9%) who identify as racially or ethnically diverse. A U.S. military veteran also serves on the leadership team. Check our website for the most up-to-date information.



Submittal Forms

PART IV - SUBMITTAL FORMS
PROPOSAL SUBMITTAL SIGNATURE FORM

1.	Project Team: Name and Title	Years experience	City of office individual will work out of for this project	City individual's office is normally located	City of individual's residence
	Eva Garza	24	Miami, FL	Miami, FL	Miami, FL
	Nnenna Alintah	25	Washington, DC	Washington, DC	Washington, DC
	Jeff Jones	12	San Francisco, CA	San Francisco, CA	San Francisco, CA
	Jennifer Fong	14	Chicago, IL	Chicago, IL	Chicago, IL
	Marko Haarma	21	Phoenix, AZ	Phoenix, AZ	Phoenix, AZ
	Ward Friszolowski, AIA Managing Senior Principal	43	St. Petersburg, FL	St. Petersburg, FL	St. Pete Beach, FL
	Thomas Mayo, AIA Principal and Office Director	38	Ft Myers, FL	Ft Myers, FL	Ft Myers, FL
	Amy Bradlow, AIA, LEED GA Principal	17	St. Petersburg, FL	St. Petersburg, FL	St. Petersburg, FL
2.	Magnitude of Company Operations				
	A) Total professional services fees received within last 24 months:			\$ see comment below	
	B) Number of similar projects started within last 24 months:			See comment below	
	C) Largest single project to date:			\$ see comment below	
3.	Magnitude of Charlotte County Projects				
	A) Number of current or scheduled County Projects			N/A	
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$0	
4.	Sub-Consultant(s) (if applicable)	Location	% of Work to be Provided	Services to be Provided	
	Harvard-Jolly PBK	St. Petersburg, FL	20%	Departmental Due Diligence & Masterplan Concepts	
5.	Disclosure of interest or involvement: List below all private sector clients with whom you have an active pending contract and who have an interest within the areas affected by this project. Also, include any properties or interests held by your firm, or officers of your firm, within the areas affected by this project.				
	Firm	Address			
	Phone #	Contact Name			
	Start Date	Ending Date			
	Project Name/Description				

NAME OF FIRM CBRE, Inc. _____
 (This form must be completed and returned)

6. Minority Business:Yes _____ No **X** _____

The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process.

Comments or Additional Information: RE: Magnitude of Company Operations – CBRE's revenue in 2023 was \$31.9B and in 2022 was \$30.8B. As a publicly traded firm, CBRE refrains from disclosing financial details. CBRE is a financially stable firm that repeatedly receives favorable ratings from financial watchdogs, such as Dun & Bradstreet and the AM Best Co. Find our financial information and SEC filings [here](#).

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List, or is not participating in a boycott of Israel.

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

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

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

Type of Organization (please check one):

INDIVIDUAL
CORPORATION

()
(X)

PARTNERSHIP
JOINT VENTURE

()
()

CBRE Inc.

Firm Name

Telephone

95-2743174

Fictitious or d/b/a Name

Federal Employer Identification Number (FEIN)

2121 North Pearl Street, Suite 300

Home Office Address

Dallas, TX 75201

City, State, Zip

119+

Number of Years in Business

777 Brickell Ave, Suite 1100, Miami FL 33131

Address: Office Servicing Charlotte County, other than above

Eva Garza, Sr. Managing Director

Name/Title of your Charlotte County Rep.

+1 305 374 1000

Telephone

Eva Garza, Sr. Managing Director

Name/Title of Individual Binding Firm (Please Print)

2/13/2025

Signature of Individual Binding Firm

Date

eva.garza@cbre.com

Email Address

(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that CBRE, Inc.
does: (name of business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



Proposer's Signature

02/13/2025

Date

(This form must be completed & returned)

**HUMAN TRAFFICKING AFFIDAVIT
for Nongovernmental Entities Pursuant To FS. §787.06**


Charlotte County Contract #20250217

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.



Signature

Eva I. Garza

Printed Name

Senior Managing Director

Title

CBRE Inc.

Nongovernmental Entity

2/13/2025

Date

END OF PART IV

(This form must be completed & returned)

Thank You.

FOR MORE INFORMATION,
PLEASE CONTACT:

Eva Garza, AICP, LEED AP & Prosci

Senior Managing Director
+1 646 275 2995
eva.garza@cbre.com

Nnenna Alintah

Managing Director
+1 202 585 5522
nnenna.alintah@cbre.com

Ward Friszolowski, AIA

Principal-in-Charge
+1 727 896 4611
w.friszolowski@harvardjolly.com



CBRE © 2025 All Rights Reserved. All information included in this proposal pertaining to CBRE—including but not limited to its operations, employees, technology and clients—are proprietary and confidential, and are supplied with the understanding that they will be held in confidence and not disclosed to third parties without the prior written consent of CBRE. This letter/proposal is intended solely as a preliminary expression of general intentions and is to be used for discussion purposes only. The parties intend that neither shall have any contractual obligations to the other with respect to the matters referred herein unless and until a definitive agreement has been fully executed and delivered by the parties. The parties agree that this letter/proposal is not intended to create any agreement or obligation by either party to negotiate a definitive lease/purchase and sale agreement and imposes no duty whatsoever on either party to continue negotiations, including without limitation any obligation to negotiate in good faith or in any way other than at arm's length. Prior to delivery of a definitive executed agreement, and without any liability to the other party, either party may (1) propose different terms from those summarized herein, (2) enter into negotiations with other parties and/or (3) unilaterally terminate all negotiations with the other party hereto. CBRE and the CBRE logo are service marks of CBRE, Inc. and/or its affiliated or related companies in the United States and other countries. All other marks displayed on this document are the property of their respective owners.