

PROPOSAL for RFP #20250360

Don Pedro and Knight Island Neighborhood Plan

SUBMITTED TO

Alisa True, CPPB, Senior Contract Specialist

Charlotte County Purchasing Division

18500 Murdock Circle, Suite 344

Port Charlotte, FL 33948

SUBMITTED BY



1530 Dolphin Street, Suite 4

Sarasota, FL 34236

941-232-8222



June 2, 2025

Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, FL 33948

ATTN: Alisa True, CPPB, Senior Contract Specialist

RE: RFP #20250360

Dear Evaluation Committee,

Shafer Consulting is pleased to submit this proposal demonstrating our high level of ability and proven reliability to deliver an updated *Thornton Key, Palm Island, Knight Island, and Don Pedro Island Community Plan* on-time and within budget. The updated plan will reference, update and mirror the 2006 Community Plan and reflect the desires of the majority of the community members as expressed during facilitated community meetings and community surveys.

We believe our team is highly qualified with an effective project approach to produce a Community Plan Update that is powerful in its collaborative vision. We bring a working knowledge of coastal community planning throughout the Gulf region.

Jennifer Shafer is the prime respondent for this proposal and is authorized to make representations on behalf of Shafer Consulting for purposes of this Request for Proposals (RFP). My contact info is:

SHAfer CONSULTING LLC
Jennifer Shafer, President
1530 Dolphin Street, Suite 4
Sarasota, Florida 34236
jennifer@shaferconsulting.com
(941) 232-8222

Sincerely,

A handwritten signature in blue ink that reads "Jennifer L. Shafer".

Jennifer L. Shafer, PhD
President

EVALUATION CRITERIA

I. PROJECT TEAM (Responsive to RP-24A Team Organization and RP-24C Individual Qualifications)

Shafer Consulting has assembled a high-performance team of skilled and experienced professionals who regularly work together to produce outstanding results. The team knows Charlotte County and is familiar with the challenges and rewards of barrier island planning. Shafer has a proven track record of working with Southwest Florida coastal communities to develop outstanding comprehensive collaborative plans.

Jennifer Shafer, PhD (see resume)

Jennifer Shafer will serve as **Project Manager** and primary contact with the Charlotte County Project Manager and Team. Together with David Shafer, she will co-lead **strategic planning, facilitation, issues and policy research, writing, and editing**. She will lead **GIS** and project **web development**. Jennifer is President and co-owner of Shafer Consulting. Jennifer Shafer will not be substituted without the express permission of Charlotte County.

Jennifer specializes in strategic planning, facilitation and consensus development, community engagement design and execution, policy and issues research. She is a skilled writer and editor and rounds out her project deliverables with GIS and website design skills. She holds a PhD in geography from the University of Hawai`i (2007), specializing in resource management; a MS in marine ecology from the University of Hawai`i, and a BA in biology from Wellesley College.

Her recent strategic planning experiences include being the lead consultant on developing seven *Comprehensive Conservation and Management Plans* (CCMPs) for National Estuary Programs from 2017-2025 (see resume for listing). Another recent stakeholder driven project included developing an Environmental Action Plan for the Town of Longboat Key. She was co-lead on the development of a water quality improvement strategic plan, the *Water Quality Playbook*, created as a community-driven plan to improve water quality in Sarasota County. The design philosophy and approach for developing these strategic plans is very similar to that for developing this Community Plan for the Islands.

Her policy work includes post-action analysis to create a *Red Tide Response Operations Plan* template for five counties in the Tampa Bay region. Jennifer conducted policy analysis to support recommendations for rule and ordinance updates in the *Water Quality Playbook*. She also served as an appointed member of Sarasota County's *Environmental Policy Task Force* charged with reviewing and recommending updates to the Environmental Chapter of the Comprehensive Plan and served 12 years on Sarasota County's *Environmentally Sensitive Lands Oversight Committee*. Prior to her work in southwest Florida, Jennifer worked in Hawaii practicing fisheries management and marine policy consulting for the Main and Northwest Hawaiian Islands.

In addition to community engagement work that formed the basis for developing these strategic plans, Jennifer has thousands of hours of experience delivering public outreach and education about water quality and quantity issues in Sarasota County watersheds. She has significant experience in engaging communities through conferences, workshops, and festivals including three *Environmental Summits*, a *Green Living Expo*, two *HOA Healthy Ponds Workshops*, and five annual *Alligator Creek Festivals* for the Lemon Bay community.

David Shafer, PhD (see resume)

David Shafer will serve as **Deputy Project Manager**. Together with Jennifer Shafer, he will co-lead **strategic planning, facilitation, research, and writing**. He will lead **graphic design, photography, and illustration** for the plan, meetings, and web. David is the co-owner of Shafer Consulting and will not be substituted without the express permission of Charlotte County.

David specializes in strategic planning and communicating technical and policy issues through analysis, education, outreach, and creative design. He excels at translating and transferring complex scientific and engineering concepts to diverse audiences and in facilitating creative, co-productive, and consensus-forming interactions among stakeholders, managers, and policymakers. David has honed his skills in conflict resolution over years of meeting facilitation in Southwest Florida and has completed the NOAA Coastal Services Center's Public Issues and Conflict Management professional training.

He has a PhD in ecology from the University of Hawai`i (1998) and a BA in biology from Wabash College (1987). His areas of specialization include strategic planning, communication of science, engineering, and policy to the public, outreach and education, community engagement, conflict resolution and consensus development, technical and lay writing, research and statistical analysis, and graphic design, photography, and illustration.

His recent strategic planning experiences include being the lead consultant in developing seven Comprehensive Conservation and Management Plans (CCMPs) for National Estuary Programs, including Coastal & Heartland National Estuary Partnership (2017 and 2024), Sarasota Bay Estuary Program (2021), Tampa Bay Estuary Program (2017 and 2024), Mobile Bay National Estuary Program (2019), and Narragansett Bay National Estuary Program (expected to be completed in 2025). He has also led community engagement for the three recent Watershed Management Plan Updates for Sarasota Bay (2022), Little Sarasota Bay (expected completion 2025), and Lemon Bay (expected completion 2026). The processes and skillsets necessary to develop these successful strategic plans for coastal estuary communities are very similar to those required to develop a successful *Thornton Key, Palm Island, Knight Island, and Don Pedro Island Community Plan Update*.

He was co-lead on the development of a community-driven water quality improvement strategic plan, *The Water Quality Playbook*, in Sarasota County. Another similar project included developing the *Town of Longboat Key Environmental Action Plan*.

In addition to community engagement work that formed the basis for developing these strategic plans, David has thousands of hours of engagement experience in providing outreach and education about water quality and quantity issues in Sarasota County watersheds. He has

significant experience in engaging communities ranging in size and complexity from small working groups to workshops, conferences, and festivals.

He is also part-time Co-executive Director of the Science and Environment Council, a network of 45 science-based environmental organizations working from Tampa Bay to Charlotte Harbor.

David has significant writing and editing skills, demonstrated in seven Comprehensive Plans for National Estuary Programs, the *Healthy Ponds Guide*, and the *Green Living Toolkit*. He is also skilled in graphic design, illustration, and photography. Examples of recent graphics work include the Coastal & Heartland National Estuary Partnership's 2025 *Comprehensive Conservation and Management Plan* and the 2025 *Healthy Ponds Guide*.

Before forming Shafer Consulting in Florida, David conducted research on fish ecology, taught college, and worked with a team in Hawai`i that laid the groundwork for establishing the largest marine protected area in the world—the Papahānaumokuākea Marine National Monument.

Christine Quigley, MS

Christine will assist in **research and writing** the Community Plan. She will also support **facilitation and meeting logistics**.

Christine has significant experience and skills in science communication and outreach, natural resource management, program management, research and writing, and community relations and facilitation. She has worked with Shafer Consulting since 2016. She has assisted Shafer in developing Comprehensive Conservation and Management Plans for National Estuary Programs and has contributed to creation and maintenance of web-based community resources, including the *Green Living Toolkit* and *Water Quality Playbook*. She held significant roles in implementation of the Alligator Creek Festival, Healthy Ponds Workshops, and 2018 and 2023 Environmental Conferences.

In other work, she connects and coordinates volunteers for the Sarasota Bay Estuary Program and Eyes of Seagrass citizen science programs. She is highly skilled at connecting and building relationships with key stakeholder communities. Christine has a MS in Environmental Science and Management from Bren School of Environmental Science & Management, University of California, Santa Barbara (2013) and a BS in Science in Marine Science and Biology from the University of Miami, Coral Gables, Florida.

Kendall Southworth, BA

Kendall will assist in **research and writing** the Community Plan. She will support **facilitation and meeting logistics**.

Kendall is an accomplished writer, who recently co-authored the first-ever book on wetlands butterfly conservation, *Florida's Aquatic Butterfly Gardens*. She has worked closely with Shafer in conducting public engagement on water quality and quantity issues in coastal watersheds. She also recently assisted Shafer in marketing and producing the 2023 Environmental Conference. Kendall has a BA in Environmental Studies from New College (2020).

JENNIFER SHAFER, PHD

Strategic Planning, Community Engagement

Jennifer is President of Shafer Consulting and specializes in strategic planning and communicating science and science-policy issues through technical analysis, education, outreach, and creative design. She excels at translating and transferring complex scientific and engineering concepts and information to diverse audiences and in facilitating creative, co-productive, and consensus-forming interactions among stakeholders, managers, and policymakers.

SELECTED STRATEGIC PLANNING EXPERIENCE

► National Estuary Program Comprehensive Conservation and Management Plans (lead):

Five-year-planning, research, writing, science communication, interviews, community engagement, polling, consensus-building, project management, graphics.

- Tampa Bay Estuary Program (2017 and 2024)
- Coastal & Heartland National Estuary Partnership (2019 and 2025)
- Sarasota Bay Estuary Program (2021)
- Mobile Bay National Estuary Program (2019)
- Narragansett Bay National Estuary Program (ongoing/2025)

► Watershed Management Plan Updates (subcontractor):

Convening, facilitation, engagement, communication, social media, graphics.

- Sarasota Bay Watershed Management Plan (2022)
- Little Sarasota Bay Watershed Management Plan (ongoing/2025)
- Lemon Bay Watershed Management Plan (ongoing/2025)

► Water Quality Playbook (co-lead, 2021, 2025):

Research, writing, graphics, web design, facilitation, consensus-building. Nutrient reduction plan for Sarasota County prepared for the Gulf Coast Community Foundation.

► Town of Longboat Key Environmental Action Plan (lead, 2023):

Planning, convening, facilitation, consensus-building, project management.

SELECTED COMMUNITY ENGAGEMENT EXPERIENCE

► Sarasota County Stormwater Environmental Utility Outreach & Education (lead, 2013–present):

Outreach campaign design and implementation, science communication, writing, design, marketing, social media, interactive displays. This work includes thousands of hours of engagement in Sarasota County watersheds.

► Conferences, Workshops, and Festivals (lead):

Watershed Symposium (2012, 250 people), Environmental Summit (2018, 400 people), EcoSummit (2023, 530 people), Evening of Florida Stories (2023, 1,182 people), Green Living Expo (2023, 570 people), HOA Pond Workshops (100 people, 2022, 2024); Alligator Creek Festival (350 people, 2020–2024); Event scoping, design, planning, convening, production, facilitation, writing, graphics, polling, project management. Conducted for the Science and Environment Council.

► Educational Guides (co-lead):

Healthy Ponds Guide (2022, 2024): Editing, graphics, design. *Green Living Toolkit* (2023): Writing, editing, graphics, web design. Created for the Charles & Margery Barancik Foundation.

► Science and Environment Council (lead, 2013–present):

Networking, planning, development, fundraising, grant-writing, project implementation, project management, writing, editing, graphics. Part-time Co-executive Director of the non-profit network of 45 leading science-based environmental organizations working between Tampa Bay and Charlotte Harbor.



AREAS of SPECIALIZATION

- Environmental Strategic Planning
- Communication of Science and Engineering to the Public
- Outreach & Education, including Campaign Design & Implementation
- Community Engagement
- Conflict Resolution & Consensus Development
- Technical & Lay Scientific Writing
- Research & Statistical Analyses
- GIS
- Website Design & Build

EXPERIENCE

18 years

EDUCATION

PhD, Geography
University of Hawai'i, 2007

MS, Marine Ecology
University of Hawai'i, 1996

BA, Biology
Wellesley College, 1991

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DAVID SHAFER, PHD

Strategic Planning, Community Engagement

David is a principal of Shafer Consulting and specializes in strategic planning and communicating science and science-policy issues through technical analysis, education, outreach, and creative design. David excels at translating and transferring complex scientific and engineering concepts and information to diverse audiences and in facilitating creative, co-productive, and consensus-forming interactions among stakeholders, managers, and policymakers.

SELECTED STRATEGIC PLANNING EXPERIENCE

► National Estuary Program Comprehensive Conservation and Management Plans (lead):

Five-year-planning, research, writing, science communication, interviews, community engagement, polling, consensus-building, project management, graphics.

- Tampa Bay Estuary Program (2017 and 2024)
- Coastal & Heartland National Estuary Partnership (2019 and 2025)
- Sarasota Bay Estuary Program (2021)
- Mobile Bay National Estuary Program (2019)
- Narragansett Bay National Estuary Program (ongoing/2025)

► Watershed Management Plan Updates (subcontractor):

Convening, facilitation, engagement, communication, social media, graphics.

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Research, writing, graphics, web design, facilitation, consensus-building. Nutrient reduction plan for Sarasota County prepared for the Gulf Coast Community Foundation.

► Town of Longboat Key Environmental Action Plan (lead, 2023):

Planning, convening, facilitation, consensus-building, project management.

SELECTED COMMUNITY ENGAGEMENT EXPERIENCE

► Sarasota County Stormwater Environmental Utility Outreach & Education (lead, 2013–present):

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► Educational Guides (co-lead):

Healthy Ponds Guide (2022, 2024): Editing, graphics, design. *Green Living Toolkit* (2023): Writing, editing, graphics, web design. Created for the Charles & Margery Barancik Foundation.

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Networking, planning, development, fundraising, grant-writing, project implementation, project management, writing, editing, graphics. Part-time Co-executive Director of the non-profit network of 45 leading science-based environmental organizations working between Tampa Bay and Charlotte Harbor.



AREAS of SPECIALIZATION

- Environmental Strategic Planning
- Communication of Science and Engineering to the Public
- Outreach & Education, including Campaign Design & Implementation
- Community Engagement
- Conflict Resolution & Consensus Development
- Technical & Lay Scientific Writing
- Research & Statistical Analyses
- Graphics: Design, Photography & Illustration

EXPERIENCE

27 years

EDUCATION

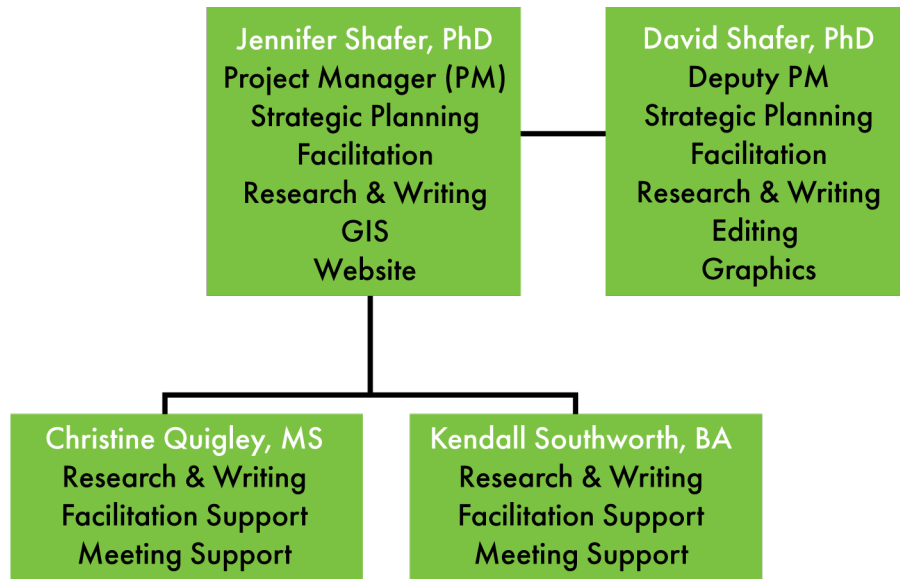
PhD, Ecology
University of Hawai'i, 1998

BA, Biology,
Wabash College, 1987

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II. TEAM MANAGEMENT PLAN (Responsive to RP-24A Team Management)

Team organization for Community Meetings and Community Plan Updates



Organizational chart of project team, inclusive of subconsultants

As Project Manager, Jennifer Shafer will be responsible for managing the project schedule, controlling costs, and overseeing overall team coordination. David Shafer, serving as Deputy Project Manager, will provide backup support for project management duties. **Together, Jennifer and David will co-lead all community meetings and develop the updated Community Plan.** Their responsibilities include designing the engagement process, preparing meeting materials, hosting and facilitating meetings, conducting research, drafting and editing chapter updates, and delivering the final designed product.

Shafer Consulting's trusted sub-consultants, **Christine Quigley and Kendall Southworth, will support the logistics and facilitation of community meetings and contribute to research and chapter drafting.** Our experienced and agile four-person team, with overlapping skills and responsibilities, ensures continuity, maintains project momentum, and delivers consistently high-quality work.

III. TEAM EXPERIENCE (Responsive to RP-24A General Qualifications and RP-24C Individual Qualifications)

The Shafer Consulting Team has significant experience with all elements necessary to develop an outstanding Community Plan. In this section we feature community planning and meeting projects that document our experience. This section shares common elements with *Section I Project Team*, *Section VI Similar Projects Completed*, and *Section VII Specific Experience and Capabilities*.

Please see Section VII for a matrix of specific projects paired with capabilities.

A. Selected Community Planning Experience

National Estuary Program Comprehensive Conservation and Management Plans (CCMPS)

Shafer Consulting was lead consultant for developing the Five-year CCMPS for our region's three National Estuary Programs, plus two others outside the area:

- Tampa Bay Estuary Program (TBEP, 2017 and 2024)
- Coastal & Heartland National Estuary Partnership (CHNEP, 2019 and 2025)
- Sarasota Bay Estuary Program (SBEP, 2021)
- Mobile Bay National Estuary Program (MBNEP, 2019)
- Narragansett Bay National Estuary Program (NBNEP, ongoing/2025)

Developing these plans included significant community engagement, issues research, strategic planning, and document production.

Although many of these communities had similar priority issues, solution-spaces differed according to slightly different values, cultures, and politics. Similarly, workflows differed from plan to plan. For example, workflows for CHNEP and SBEP involved helping to lead multi-year strategic planning process through dynamic engagement with staff, management conferences (technical advisory committees, citizen advisory committees, management committees, and policy boards), partners, stakeholders, elected officials, and the public. For NBNEP, staff had already conducted multi-year scoping, and our planning work focused more on critical thinking, prioritization, organization, and writing. For MBNEP, we worked closely with staff to develop the Plan and helped develop a community workshop of 350 people to gather input and build consensus.

The work for all plans involved facilitating the community of stakeholders in developing strategic goals, objectives, and activities, translating complex science and policy issues to diverse audiences, research, analysis, and writing. It also involved facilitating meetings and building consensus and support among partners and communities.

Final document production also varied among Plans. For SBEP and MBNEP, we delivered a clean, formatted Word document with tables and figures. For TBEP, we designed the final plan into an easy navigation website for their plan (<https://tbep-tech.github.io/ccmp/docs/water/wq1.html>).

For CHNEP, we created a visually rich printed book with maps, infographics, illustrations, and photographs (). This Plan reflects the full suite of our skills.

Watershed Management Plans

Shafer Consulting was a subcontractor for the development of Watershed Management Plans in Sarasota County including:

- Sarasota Bay Watershed Management Plan (2022)
(<https://www.scgov.net/government/public-works/watersheds/sarasota-bay-watershed-management-plan>)
- Little Sarasota Bay Watershed Management Plan (ongoing/2025)
- Lemon Bay Watershed Management Plan (ongoing/2025)

For these projects, Shafer led the community engagement for plan development. Work included identifying and inviting stakeholders and convening community members and experts, facilitation, stakeholder communications, active listening and recording, social media, and graphics.

Water Quality Playbook

Shafer Consulting was the co-author of the *Water Quality Playbook* (2020), a community-based plan for reducing nutrient pollution in Sarasota County waters. Shafer led convening, facilitating, and consensus-building activities for developing 42 recommended actions in the Plan. Shafer Consulting conducted issues research and analysis on water policy (<https://waterqualityplaybook.org/policy/>) and community outreach (<https://waterqualityplaybook.org/education/>) solutions. Shafer edited the final 250 page draft to a uniform voice, developed photography and graphics, and designed and built the Playbook's visually engaging and easy to navigate website (<https://waterqualityplaybook.org/>). The 2025 update of the Playbook was accomplished with the same team as is proposed for this project.

Town of Longboat Key Environmental Action Plan

Shafer Consulting led convening, facilitation, consensus-building, and planning for developing the *Town of Longboat Key Environmental Action Matrix*. We worked with staff and the Town of Longboat Key's resident led Green Team Advisory Group to articulate and prioritize actions for improved environmental stewardship on the island.

Florida Red Tide Impact and Response

Shafer developed a Draft Red Tide Operations Plan and recommendations for red tide emergency response for the five counties of the Tampa Bay and Sarasota region (Volume 2) based on staff interviews and policy analysis following the 2018 red tide event.
(<https://www.scienceandenvironment.org/project/redtide/>).

B. Selected Community Engagement Experience

In addition to Community Engagement associated with development of Management Plans for National Estuary Programs, Sarasota Watersheds, and the Town of Longboat Key, Shafer Consulting has thousands of hours of experience in engaging communities in Southwest Florida.

Sarasota County Stormwater Environmental Utility Outreach & Education

From 2013–present, Shafer Consulting has conducted outreach, education, and engagement in Sarasota County watersheds associated with best practices for improving water quality and quantity issues. Work involved engagement campaign design and implementation, science communication, writing, design, marketing, social media, interactive displays, and thousands of hours of direct engagement with the community. (For example, <https://www.scienceandenvironment.org/project/water-quality/> and <https://www.scienceandenvironment.org/project/hoa/>)

Workshops, Conferences & Festivals

Shafer Consulting has significant experience in engaging the community through workshops, conferences, and festivals. We led development of three regional environmental conferences including the Watershed Symposium (2012, 250 people), Environmental Summit (2018, 400 people), EcoSummit (2023, 530 people), Evening of Florida Stories (2023, 1,182 people), Green Living Expo (2023, 570 people), HOA Pond Workshops (100 people, 2022, 2024); and Alligator Creek Festival (350 people, 2020–2024). This work involved scoping, design, planning, convening, production, facilitation, writing, graphics, polling, and project management. (For example, <https://www.scienceandenvironment.org/project/2023summit-expo/> and <https://www.environmental-summit.com/>)

IV. PROJECT CONTROL

Shafer is committed to the assurance of high-quality on-time and on-budget deliverables presented by a responsive and collaborative team of professionals. We approach each project as a partnership, with good communication as the foundation of our trusted working relationship, resulting in long-standing relationships with satisfied clients over multiple projects.

A. Schedule

To ensure this project remains on schedule, we will implement a clear and transparent timeline management system using a cloud-based Gantt chart. This dynamic timeline tool will identify all major tasks, deliverables, and milestones—including community meetings, chapter drafts, and public review points—aligned with the 9-month project window. Dependencies (critical pathways) for interrelated tasks will be color-coded to show how the community workshops inform information discovery and how both workshops and aggregated information inform development of the Community Plan Update. We will also build realistic time buffers for critical path tasks – namely, allowing time between meetings and at the end of the project timeline to absorb any delays due to unexpected weather impacts.

As Project Manager, Jennnifer Shafer will be responsible for maintaining the schedule. She will oversee team coordination, community meeting planning, and deliverable development to ensure each phase stays on track. She will coordinate closely with the Charlotte County Project Team and the community Islands’ resident Advisory Committee to align on all meeting dates and deliverable deadlines. Internal weekly reviews and monthly virtual progress meetings with the County Project

Team will be used to monitor progress and make adjustments early, if needed. The small size of our team allows for nimble decision-making and rapid response to keep the timeline on course.

B. Cost

Our cost control approach is based on informed budgeting, pre-approval, and diligent tracking. After selection as the preferred firm and approval of the detailed Scope of Services, we will develop a total project cost for approval by the County and a task-based budget covering time, travel, and materials. Our budget will make realistic assumptions about the costs and logistics of working on a bridgeless island. All project expenses will be included in the budget. If any changes to the Scope arise as mutually agreed upon with the County, we will anticipate and request pre-approval of any resulting expenditures before they are incurred.

We maintain cost control through careful budget management, real-time tracking, and regular budget vs expense reviews. Individual expenses will be pre-approved by the Project Manager and supported by receipts. Expenditures will be tracked in Shafer Consulting's business accounting software, aligned with the task-based budget, and reviewed monthly.

Jennifer Shafer will lead cost control. By having a single point of responsibility for both schedule and cost, we ensure tight integration of time and budget management. With a focused team and minimal overhead, we ensure efficient use of project funds. Our past projects—including similar multi-meeting public planning efforts—have all been completed within budget.

C. Workload

As of June 2025, we anticipate wrapping up several major project commitments by the end of July, leaving us with substantial availability going into the project start. From August 2025 through March 2026, our team's primary professional commitment will be this project, reflecting our deliberate decision to prioritize this unique opportunity. While we are supporting up to three other projects as subconsultants during this time, those roles are limited to facilitating monthly community watershed planning meetings and will not conflict with this effort. With only one major commitment—this Community Plan—we are well-positioned to meet deadlines, adapt to County schedules, and fully support the project through completion, including evening or weekend community workshops, if needed. Our lean team structure and direct control over scheduling and communications give us the flexibility to pivot quickly and respond to evolving project demands. With decades of combined experience juggling a manageable workload as a small firm, we are confident in our ability to dedicate the necessary time and attention to meet all expectations.

V. PROJECT APPROACH (Responsive to RP-24B Work Plan)

Thornton Key, Palm Island, Knight Island, and Don Pedro Island (the Islands) are a unique bridgeless barrier island community characterized by pristine natural environments, low-density residential development, and a fiercely protective local population. The original 2006 Community Plan established a vision centered on preserving environmental quality, maintaining the “Old Florida” island character, and limiting growth consistent with the islands' infrastructure

constraints. Key values from that plan – such as conservation of sensitive coastal habitats, strict low-density zoning, and opposition to any bridge connection – remain firmly in place today. Recent public input confirms that residents strongly favor keeping the current ferry access and secluded character of the islands over any new infrastructure that could spur development. The community, which includes many highly educated and high-net-worth homeowners, demonstrates its commitment to these values through active stewardship. For example, island residents formed the Bocilla Islands Conservancy in 2015 to preserve natural resources and “help preserve these special islands” for future generations.

This history and context guide our project approach – ensuring that the update of the 2006 Plan honors the community’s environmental ethos, preserves its low-density residential character, and addresses current needs (such as post-hurricane resiliency and updated county policies) without altering the unique island lifestyle. We recognize that the community’s expectations are high: they desire a plan aligning with their values (tranquil natural surroundings, minimal commercial intrusion, and sustainable infrastructure) and meeting Charlotte County’s planning standards. Our project approach demonstrates a solid understanding of the project, a clear methodology for engagement and plan development, a realistic timeline, and the expertise to deliver a final plan worthy of this exceptional island community.

A. Community meeting philosophy

Our community meeting philosophy centers on respect, transparency, and responsiveness. We recognize that the Island residents are deeply invested in the future of their community and bring a wealth of lived experience, expertise, and civic pride. Our role is to create an environment where that input is valued, gathered systematically, and reflected accurately in the updated Community Plan.

We will facilitate meetings as conversations, not presentations—encouraging genuine dialogue, not top-down instruction. Every meeting will be designed to offer meaningful opportunities for residents to shape outcomes. We will utilize structured engagement tools such as live polling (via Mentimeter), interactive feedback stations, real-time digital whiteboarding (via Miro), and paper-based feedback for in-person accessibility. Our meeting materials will be concise, visual, and grounded in clear questions for the community to respond to.

We are also mindful of the islands’ physical constraints. All meetings will be held on-island for convenience and offer a hybrid option for remote experts to participate, if needed. To ensure inclusivity, we will provide online surveys (via Google Forms or Mentimeter) mirroring meeting content for those residents unable to attend. Meeting schedules, agendas, content, and summaries will be posted on a project website, along with draft and final documents. By combining in-person engagement with flexible digital tools, our facilitation approach maximizes participation and ensures residents’ voices are authentically captured in each phase.

B. Design philosophy

Our design philosophy encompasses both the **planning principles** that will shape the substance of the updated Community Plan and the **visual presentation** of the final product as a clear, engaging, and enduring document.

At the conceptual level, our design approach to shaping the content and direction of the plan is guided by the island community's long-standing values of environmental stewardship, low-density development, and resistance to infrastructure changes that could invite overdevelopment. We understand the plan should reinforce the vision articulated in the original 2006 Plan while integrating updated community priorities. We will ensure that each chapter is developed in a way that reflects community input, clarifies implementation strategies, and respects the islands' unique character and constraints. Throughout the process, we will use an *equity of voice model*, emphasizing consensus-building over technical recommendation, so that the updated plan is genuinely authored by the community itself. Our role is to translate the community's vision into well-organized, implementable recommendations, not to impose professional opinions.

At the document level, our design philosophy is grounded in three principles: clarity, visual quality, and usability. We believe the final Community Plan Update must be more than a document—it must be a trusted, accessible, and enduring reference that residents and County Project Team will turn to for years to come. The narrative will be supported by informative graphics, custom maps, and photo contributions from island residents (collected via a community photo contest or callout). Importantly, the final plan will use plain language, supported by clear summaries and sidebars that explain regulatory or technical content. The final product will be designed either as a visually rich, print-ready **“coffee table” book** (e.g., www.chnep.org/our-plan) or an **interactive website** (e.g., www.waterqualityplaybook.org)—formats proven effective with similar high-engagement, high-expectation communities. Both options will reflect the islands' beauty and character while being practical tools for reference, decision-making, and communicating to new residents and visitors the values and norms of the community.

C. Anticipated problems and solutions

We anticipate three primary challenges for this project and have proactive solutions for each:

1. Mistrust or Engagement Fatigue

Given the high civic engagement of the island residents, some individuals may come to the process skeptical of outsiders or fatigued by past planning efforts.

Solution: We will address this by working closely with the Island Advisory Committee to co-host each event, ensuring community ownership and sending the message that facilitators are neutral conveners—not decision-makers. We will build trust through a transparent, respectful process that prioritizes inclusive participation and publicly accessible meeting materials. Meetings will use small-group formats, structured prompts, and tools like anonymous live polling to ensure every resident—whether outspoken or quiet—can contribute meaningfully. All input will be compiled into feedback matrices that clearly show how public comments are addressed in chapter revisions, reinforcing accountability.

2. Access and Participation Limitations

The unique logistics of island life—weather, ferry schedules, seasonal residency—may limit in-person participation.

Solution: All public meetings will be held on-island to minimize travel barriers for residents. Meeting materials and digital surveys mirroring meeting content will be made available on the project webpage for easy remote input from those unable to attend. This approach ensures that full-time, part-time, and remote property owners have equal opportunities to participate, and that the final plan reflects the perspectives of a broad cross-section of the community.

3. Complex or Controversial Topics

Challenging issues such as infrastructure investment, enforcement, or disaster preparedness may elicit strong opinions and conflicting priorities.

Solution: We will present technical content in clear, unbiased formats and use structured feedback tools (polling, facilitated small-group discussion, comment boards, dot-voting or priority-ranking tools) to gather views and identify consensus without encouraging unproductive conflict or belabored points. Every contribution will be treated as valid and will be documented alongside others, regardless of frequency or volume. This ensures that even single voices raising complex or minority perspectives are acknowledged.

By using structured facilitation grounded in the *equity of voice model*, we ensure that all participants—regardless of location, prior knowledge, status, or communication style—have opportunity to contribute, helping reduce bias, build trust, and ensure a more representative outcome.

D. Community Plan update process

We understand the objective of the project is to produce a Community Plan Update that reaffirms the original vision while integrating new information and the desires of the majority of community members. As neutral and objective facilitators and rapporteurs, we will refrain from making professional recommendations. Our proposed nine-month update process is organized into logical phases and tasks, sequenced to maximize community involvement, incorporate feedback at every milestone, and maintain clear communication with the Island Advisory Committee and County Project Team.

We understand the RFP specifies that the seven Chapters of the 2006 Plan will be reviewed and updated over four Community Input Workshops in three phases (Phase 1: Chapters 1-2; Phase 2: Chapters 3-4-5; Phase 3: Chapter 6-7), with meetings sequenced to gather resident input at the beginning and end of each phase. With the update process structured across four community meetings, we recommend adjusting the phasing of the chapters as Phase 1: 1-2, Phase 2: 3-4, and Phase 3: 5-6-7, due to the complexity of Chapter 4 Infrastructure, which will take more time. [While this approach is feasible with the schedule of Tasks and Deliverables outlined below, we are open to adding additional community meetings for a total of ten—one exploratory meeting to start each Phase (3) and one review meeting after each Chapter (7).]

The meetings will include a comprehensive presentation of the review process and proposed revision. At each major milestone (completion of each public workshop and each phase of

chapters), we will seek feedback and approval from the Island Advisory Committee and County Project Team before moving forward. This ensures the plan remains community-driven and that resident leaders are champions of the final product.

The following table provides an overview of the task schedule and deliverables based upon our understanding of the Scope of Services to deliver four community input sessions.

Task	Task Description	Deliverables	Expected Timeframe
1	Kick-off Meeting	Meeting agenda & summary notes; refined scope/schedule/cost; Gantt chart; project contact list	August 2025 (Month1)
2	Stakeholder Engagement Strategy	Engagement Plan document	August 2025 (Month 1)
3	Community Workshop #1	Meeting materials, meeting summary notes, summary of engagement.	September 2025 (Month 2)
4	Draft Updates to Chapters 1-2	Draft Chapters 1-2 (Word); comments resolution log; revised drafts after committee and staff input	September 2025 (Month 2)
5	Community Workshop #2	Meeting materials, meeting summary notes, summary of engagement.	October 2025 (Month 3)
6	Draft Updates to Chapters 3-4	Revised Chapters 1-2; Draft Chapters 3-4 (Word); comments resolution log; revised drafts after committee and staff input	October-November 2025 (Month 3-4)
7	Community Workshop #3	Meeting materials, meeting summary notes, summary of engagement.	December 2025 (Month 5)
8	Draft Updates to Chapters 5-7	Revised Chapters 3-4; Draft Chapters 5-7 (Word); comments resolution log; revised drafts after committee and staff input	December 2025-January 2026 (Month 5-6)
9	Community Workshop #4	Meeting materials, meeting summary notes, summary of engagement.	February 2026 (Month 7)
10	Draft Final Plan	Revised Chapters 5-7; Final Plan (Word)	February 2026 (Month 7)
11	Graphic Design	Full-color designed book (print-ready PDF) or website	March 2026 (Month 8)
	Weather Delay Contingency Time		April 2026 (Month 9)

PROJECT INITIATION

Kickoff Meeting: Conduct a kickoff meeting (Month 1 anticipated August 2025) with Charlotte County Project Team and the Islands' resident Advisory Committee. We will review project goals and expectations, confirm roles/responsibilities, and establish team communication and file sharing protocols. We propose using G Suite or MS Teams tools for collaboration and a public webpage (hosted on the Charlotte County Community Development website) for posting community meeting schedules, agendas, meeting materials, surveys, and approved drafts. The team will discuss the proposed Community Plan update process, including meeting schedule and engagement strategy. The team will discuss at a high level the 2006 Community Plan Chapters 1–7 in order to tag new and ongoing community concerns, new responsive programs, new data on environmental conditions, and changes in relevant county regulations. The team will identify subject matter experts to be consulted, both internal and external to Charlotte County government.

Deliverables: Meeting agenda & summary notes; refined scope/schedule/cost; project contact list.

Stakeholder Engagement Strategy: Immediately following the kickoff meeting in Month 1, finalize the detailed Stakeholder Engagement Strategy. This will include: 1) scheduling on-island community input sessions, 2) establishing protocols for meeting notice (via Palm Island ferry landing bulletin board, Island community newsletters, postcard mailings to Island property owners, existing Islander email lists, Islander social media groups, and project webpage), 3) standing up the project page, and 4) establishing protocols for community surveys in-person and online (via Mentimeter and Google Forms for those unable to attend community meetings in person).

Deliverables: Engagement Plan document (Word).

Monthly Check-in Meetings: In advance of each Community Workshop and at least monthly, the Project Team and Island Advisory Team will meet virtually (via Zoom or MS Teams) to discuss project progress, upcoming milestones, and issues/information to be researched and experts to be consulted in association with upcoming Chapter topics. The Project Team will also meet to discuss review comments on drafts of Chapter updates, as they are produced.

COMMUNITY MEETINGS AND DRAFT UPDATES

Community Workshop #1: In Month 2, facilitate the first Island resident workshop at an Island location to kick off Phase 1. This interactive session will 1) review our process for the Community Plan Update, 2) review the community's vision and core values from 2006 that underpin the Plan's recommendations, and 3) discuss and seek Island residents' input on progress and priorities related to key issues in Chapter 1 Land Use and Chapter 2 Natural Resources. For example, land use issues include the mismatch between zoning and the Bridgeless Barrier Island Overlay, the rules around non-conforming structures, transfer of development rights off the Islands, and best practices for sustainable site development. Natural Resource issues include protection of marine and terrestrial wildlife, tree canopy, and water quality. The feedback from this meeting will directly guide revisions to Chapters 1 and 2.

Deliverables: Meeting materials (agenda, presentation, handouts, polls), meeting summary notes, summary of engagement (including poll results and matrix of community feedback tied to specific plan themes).

Draft Updates to Chapters 1-2: In Month 2 following Workshop #1, we will prepare updated drafts of Chapter 1 and Chapter 2 to reflect current conditions and resident recommendations using input from Workshop #1 and additional background information from the Island Advisory Committee and County Project Team. The Island Advisory Committee and County Project Team will review each draft chapter. We will meet (virtually via Zoom) with the committee and staff to discuss their comments and ensure the drafts align with community expectations.

Deliverables: Draft Chapters 1-2 (Word); comments resolution log (showing how feedback was addressed in each chapter); revised drafts after committee and staff input.

Community Workshop #2: In Month 3, host the second community meeting to present highlights of the updated Chapters 1-2 and gather any additional community input before moving forward to Phase 2. Then to kickoff Phase 2, we will discuss and seek Island residents' input on progress and priorities related to key issues in Chapter 3 Navigation and Coastal Component and Chapter 4 Infrastructure. Coastal issues include maintaining passes and beaches, including dune protection. Infrastructure issues are significant and varied, including ferry service, road and bridge maintenance, wastewater treatment options, potable water supply, solid waste removal, and sign pollution. The feedback from this meeting will directly guide revisions to Chapters 3 and 4.

Deliverables: Meeting materials (agenda, presentation, handouts, polls), meeting summary notes, summary of engagement (including poll results and matrix of community feedback tied to specific plan themes).

Draft Updates to Chapters 3-4: In Month 3-4 following Workshop #2, we will incorporate community input into Chapters 1-2 and prepare updated drafts of Chapters 3-4 to reflect current conditions and resident recommendations using input from Workshop #2 and additional background information from the Island Advisory Committee and County Project Team. The Island Advisory Committee and County Project Team will review each draft chapter. We will meet (virtually via Zoom) with the committee and staff to discuss their comments and ensure the drafts align with community expectations.

Deliverables: Revised Chapters 1-2; Draft Chapters 3-4 (Word); comments resolution log (showing how feedback was addressed in each chapter); revised drafts after committee and staff input.

Community Workshop #3: In Month 5, host the third community meeting to present highlights of the updated Chapters 3-4 and to gather any additional community input before moving forward to Phase 3. Then to kickoff Phase 3, we will discuss and seek Island residents' input on progress and priorities related to key issues in Chapter 5 Emergency Response and Disaster Planning, Chapter 6 Enforcement of Regulations, and Chapter 7 The Future of the Island. Emergency and disaster response issues include emergency evacuation and preparation. Enforcement issues include the need for more Sherriff support for patrols and volunteer training, more Code Enforcement support for zoning and code violations, and improved community outreach on Island regulations. Future

issues include Island resident input and control over issues affecting their lives and property and pocketbooks. The feedback from this meeting will directly guide revisions to Chapters 5-7.

Deliverables: Meeting materials (agenda, presentation, handouts, polls), meeting summary notes, summary of engagement (including poll results and matrix of community feedback tied to specific plan themes).

Draft Updates to Chapters 5-7: In Month 5-6 following Workshop #3, we will incorporate community input on Chapters 3-4 and prepare updated drafts of Chapters 5-7 to reflect current conditions and resident recommendations using input from Workshop #3 and additional background information from the Island Advisory Committee and County Project Team. The Island Advisory Committee and County Project Team will review each draft chapter. We will meet (virtually via Zoom) with the committee and staff to discuss their comments and ensure the drafts align with community expectations.

Deliverables: Revised Chapters 3-4; Draft Chapters 5-7 (Word); comments resolution log (showing how feedback was addressed in each chapter); revised drafts after committee and staff input.

Community Workshop #4: In Month 7, host the fourth community meeting to present highlights of the updated Chapters 5-7 and to gather any final additional community input to conclude Phase 3. Then we will present highlights of the entire Community Plan Update. After the presentation, we will transition the workshop to an Open House, with the Island Advisory Committee members present as hosts to help facilitate and show community leadership support to help build buy-in and momentum for implementation. We will provide interactive stations for residents to drop comments and indicate their priorities on each topic. This will ensure we capture the community's level of support for the overall plan and any remaining concerns. The feedback from this meeting will directly guide final revisions to the Community Plan. This session is a critical checkpoint to confirm that the draft plan truly reflects the community's vision.

Deliverables: Meeting materials (agenda, presentation, handouts, polls), meeting summary notes, summary of engagement (including poll results and matrix of community feedback tied to specific plan themes).

FINAL PLAN

Draft Final Plan: In Month 7 following Workshop #4 and we will incorporate community input on Chapters 5-7 and prepare the Draft Final Plan document. We will polish the writing and integrate any final data updates. The Island Advisory Committee and County Project Team will review the Draft Final Plan document. We will meet (virtually via Zoom) with the committee and staff to discuss their comments and ensure the final draft exceeds expectations.

Deliverable: Revised Chapters 5-7; Final Plan (Word)

Graphic Design: In Month 8 after incorporating final comments into the Final Plan, we will design and layout the plan document into a visually engaging product. The final plan can be designed either as a “coffee-table” style book (e.g., www.chnep.org/our-plan) or as an interactive website (e.g. www.waterqualityplaybook.org). In either case, it will be attractive and user-friendly for residents with a high-quality layout featuring stunning photos donated by community members

(perhaps as part of a photo contest), maps, and infographics. If published as a book, we can facilitate printing with a recommended professional print shop. If requested, we will support staff and Island residents in presenting the plan to the Charlotte County Board of County Commissioners for endorsement.

Deliverable: Full-color designed book (print-ready PDF) or website.

In summary, this comprehensive Project Approach provides a clear roadmap to update the 2006 Community Plan in a manner that is collaborative, thorough, and aligned with the community's vision. With our high-caliber team and local experience, we will deliver all required tasks – from robust stakeholder engagement through polished final deliverables – within a realistic and efficient schedule. By leveraging modern tools and experienced personnel, our approach ensures that the final plan will not only exceed the RFP requirements but also stand as a testament to the community's cherished values of environmental stewardship and island lifestyle preservation. We are excited to partner with Charlotte County and the Island residents to craft an updated plan that will guide the community for years to come.

VI. SIMILAR PROJECTS COMPLETED (Responsive to RP-24D Experiences and References)

This section references projects described in Section I Project Team, Section VI Similar Projects Completed, and Section VII Specific Experience and Capabilities. See Section IV for a matrix of specific projects paired with capabilities.

National Estuary Program Comprehensive Conservation and Management Plans (CCMPS)

The fact-based consensus-driven process for developing Comprehensive Conservation and Management Plans for National Estuary Programs is similar to that for developing a Community Plan.

- Tampa Bay Estuary Program CCMPs (TBEP, 2017 and 2024)
- Coastal & Heartland National Estuary Partnership CCMPs (CHNEP, 2019 and 2025)
- Sarasota Bay Estuary Program CCMP (SBEP, 2021)
- Mobile Bay National Estuary Program CCMP (MBNEP, 2019)
- Narragansett Bay National Estuary Program CCMP (NBMEP, ongoing/2025)

Developing these plans included significant community engagement, issues research, strategic planning, and document production. Information responsive to this RFP section includes:

Schedule Control: All deadlines for developing CCMP text documents were met by Shafer Consulting. During these multi-year planning processes, sometimes we need to adjust timelines to

accommodate client needs (e.g., approval timelines from EPA). Shafer is flexible to these timeline shifts. Once, there was a delay in completion of the graphical layout of the 2019 CCMP for CHNEP. This delay resulted from a misunderstanding or miscommunication between Shafer and CHNEP about when the layout phase would be initiated—before or after final edits. Once the Draft Final document was approved with all final edits, the layout progressed. Shafer Consulting avoids this type of issue now by specifically detailing and communicating start conditions for project phases in the scope. We also communicate conditions and progress more frequently.

Cost Control: All comprehensive plans were completed with zero cost overruns.

Difficult People/Diverse Opinions: Developing CCMPs involves diverse people with diverse ideas, including staff, managers, scientists, policymakers, and the public. Shafer Consulting’s engagement process allows for the expression of diverse opinions. During collection of the range of opinions on a topic, opinions are captured and confirmed to be fairly and accurately captured. Once confirmed, there is no need for anyone to continue to express the same idea. Others wishing to add variations to the idea are encouraged. Once those variations have been fairly and accurately captured, there is no need for additional people to express the same idea variation – until the polling or survey process begins to measure consensus. We are flexible and intentional in this process. For example, if we reach near-consensus, we may facilitate orderly real-time discussion to clarify ideas and positions to accomplish consensus.

Additional Costs: There were no additional costs associated with developing these Comprehensive Plans. Shafer Consulting maintains strict cost bounds on its work.

Reference for Sarasota Bay Estuary Program CCMP (2021):

- Darcy Young, Project Manager for the Sarasota Bay Estuary Program (Client): Currently the Executive Director of the Narragansett Bay National Estuary Program, 401-484-1726, dyoung@nbep.org
- Dr. Dave Tomasko, Executive Director for the Sarasota Bay Estuary Program (Client): 813-597-3897, dave@sarasotabay.org

Link to SBEP CCMP: <https://sarasotabay.org/wp-content/uploads/SBEP-CCMP-2022-Update.pdf>

Watershed Management Plans

Shafer Consulting was a subcontractor for the development of Watershed Management Plans in Sarasota County including:

- Sarasota Bay Watershed Management Plan (2022)
- Little Sarasota Bay Watershed Management Plan (ongoing/2025)
- Lemon Bay Watershed Management Plan (ongoing/2025)

For these projects, Shafer led the community engagement for plan development.

Schedule Control: The community engagement portion of the Sarasota Bay Watershed Plan was completed on time. Work is currently ongoing and on-schedule for the Little Sarasota Bay and Lemon Bay Watershed Management Plans.

Cost Control: Public engagement for the Sarasota Bay Watershed Management Plan was completed with no cost overruns. Work is currently ongoing and in budget for the Little Sarasota Bay and Lemon Bay Watershed Management Plan is in budget.

Difficult People/Diverse Opinions: A variety of people with diverse backgrounds, interests, agendas, and opinions participate in Watershed Planning. Shafer Consulting's engagement process facilitates the expression and capture of diverse opinions (see difficult people/diverse opinions above).

Additional Costs: There were no additional costs associated with conducting the engagement for the Sarasota Bay Watershed Plan and none are expected for the other two Plans.

Reference for Little Sarasota Bay Watershed Plan:

- Robert Laura, Sarasota County Government (Client), 941-928-9878, rlaura@scgov.net
- Brett Cunningham, Jones Edmunds and Associates (Project Manager), 352-871-7048, BCunningham@jonesedmunds.com

Link to Sarasota Bay Watershed Management Plan project page:

<https://www.scgov.net/government/public-works/watersheds/sarasota-bay-watershed-management-plan>

Link to Little Sarasota Bay Watershed Management Plan project page (ongoing):

<https://www.scgov.net/government/public-works/watersheds/little-sarasota-bay-watershed-management-plan>

Link to Lemon Bay Watershed Management Plan project page (ongoing):

<https://www.scgov.net/government/public-works/watersheds/lemon-bay-watershed-management-plan>

Water Quality Playbook

Shafer Consulting was the co-author of the *Water Quality Playbook* — a community-based plan for reducing nutrient pollution in Sarasota County waters.

Schedule Control: The Playbook was completed on time.

Cost Control: The Playbook was completed in budget.

Difficult People/Diverse Opinions: Shafer Consulting's engagement process allows for the expression of diverse opinions (see difficult people/diverse opinions above).

Additional Costs: There were no additional costs associated with developing and publishing the Playbook.

Reference: Water Quality Playbook

- Jon Thaxton, Project Manager for Gulf Coast Community Foundation (Client): 941-223-1198, JThaxton@gulfcoastcf.org.

Link to Water Quality Playbook: <https://waterqualityplaybook.org/>

Town of Longboat Key Environmental Action Plan

Shafer Consulting led convening, facilitation, consensus-building, and planning for developing the *Town of Longboat Key Environmental Action Plan*.

Schedule Control: The Plan was completed on time.

Cost Control: The Plan was completed in budget.

Difficult People/Diverse Opinions: Diverse opinions were accommodated through consensus-building processes.

Additional Costs: Additional costs accrued when the client requested, and Shafer Consulting accepted additional services associated with the Plan.

VII. SPECIFIC EXPERIENCE AND CAPABILITIES

The **matrix below** highlights our Team's specific experience and capabilities across projects. Specific experience and capabilities of the Shafer Consulting Team are also detailed in:

- *Section I Project Team:* This section features the experience and capabilities of the two principles from Shafer Consulting and two subcontractors. Specific information is provided for each team member and resumes are provided for the two principles from Shafer Consulting.
- *Section III Team Experience:* This section features experiences and capabilities of the team associated with select projects with community engagement and community planning and plan writing.
- *Section VI Similar Projects Completed:* This section details aspects of select projects according to schedule control, cost control, diverse opinions, and additional costs. References are also provided for each project.

	TBEP CCMP 2017	TBEP CCMP 2024	CHNEP CCMP 2019	CHNEP CCMP 2025	SBEP CCMP 2021	MBNEP CCMP 2019	NBNEP CCMP 2025	Sarasota Bay WMP 2022	Little Sarasota WMP 2025	Lemon Bay WMP 2026	Town of Longboat Key Plan 2023	Red Tide Emergency Response Plan	Water Quality Playbook 2020, 2025	HOA Pond Workshops
Community Engagement														
Convening														
Community Presentations														
Policymaker Presentations														
Group Facilitation														
Conflict Resolution														
Consensus Development														
Active listening/recording														
Polls/Surveys														
Relationship Building														
Meeting Logistics														
Meeting Time Management														
Issues Research														
Expert Interviews														
Literature/Web Search														
Policy Analysis														
Synthesis and Summary														
Strategic Planning														
Problem Solving														
Strategic Thinking														

Production

Illustrations															
Photography															
Layout															
Writing															
Website/Webpage															
GIS															

Project Control

On-Time			*												
On-Budget															
Diverse Opinions															
Additional Costs															

*Temporary delay to Design Phase (see Section VI for details)

A. Community meeting organization and facilitation (see Section III and Section IV)

Experiences and capabilities include:

- Convening
- Presentations
- Group Facilitation
- Conflict Resolution
- Consensus Development
- Active listening/recording
- Relationship Building
- Meeting Logistics
- Meeting Time Management

B. In-person and online opinion surveys

We have experience and capabilities for conducting, analyzing, and communicating in-person and online opinion surveys using best-in-class tools. These methods are critical to master for evaluating consensus or conflicts associated with issues. We use Mentimeter for live anonymous group polling with instant viewing of results. For distributed surveys, we use Google Forms or SurveyMonkey. We conduct group brainstorming, prioritization, and voting exercises with digital and paper-based tools, for example flip charts and dot-placing exercises, or Miro digital whiteboard for diagramming and road-mapping. We have used both in-person and online polling and surveys during project brainstorming, plan development, consensus building, and

presentations for groups of all sizes—from small working groups of a dozen to live events hosting hundreds of people.

C. Community plan writing and updates/revisions (see Section III and Section IV)

We have significant experience in writing consensus-driven plans at regional and island scales. National Estuary Program Comprehensive Conservation and Management Plans are very similar in their nature to Community Plans. Developing these plans included significant community engagement, issues research, strategic planning, and document production.

Shafer Consulting was lead consultant for developing the Five-year CCMPs for our region's three National Estuary Programs, plus two others outside the area:

- Tampa Bay Estuary Program (TBEP, 2017 and 2024)
- Coastal & Heartland National Estuary Partnership (CHNEP, 2019 and 2025)
- Sarasota Bay Estuary Program (SBEP, 2021)
- Mobile Bay National Estuary Program (MBNEP, 2019)
- Narragansett Bay National Estuary Program (NBMEP, ongoing/2025)

We also developed the Town of Longboat Key's *Environmental Action Plan*.

D. Land use and infrastructure planning

We have a working knowledge of land use principles and planning methods from years of working on water quality and land conservation in Southwest Florida. For example, our recent work on community engagement for the Sarasota County's Watershed Management Plan updates communicates water quality hotspots and flooding areas of concern based on land use patterns and road, wastewater, and stormwater infrastructure. Jennifer Shafer recently completed a GIS-based Strategic Land Conservation Plan (<https://bigwaterslandtrust.org/strategic-conservation-plan/>) for Big Waters Land Trust including a comprehensive land use and risk analysis for parcels within HUC12 watersheds across the nine county Southwest Florida region. Jennifer also served as an appointed member of Sarasota County's *Environmental Policy Task Force* charged with reviewing and recommending updates to the Environmental Chapter of the Comprehensive Plan and served 12 years on Sarasota County's *Environmentally Sensitive Lands Oversight Committee*.

E. Land development code writing.

Jennifer Shafer has varied experience in policy analysis, including researching and analyzing municipal code and state statutes to make planning recommendations. A good example are the policy activities in the *Water Quality Playbook*. Further, she served as an appointed member of Sarasota County's *Environmental Policy Task Force* charged with reviewing and writing updates to the Environmental Chapter of the Comprehensive Plan and served 12 years on Sarasota County's *Environmentally Sensitive Lands Oversight Committee*. For this Community Plan Update, we will compile and analyze new information about land development codes from Charlotte County and other experts. While the 2006 *Community Plan* does not include specific language for land development codes, if the updated *Plan* requires recommendations for specific land development

code, we will work with County staff to develop such language, or if preferred, subcontract with an expert land planner to write the necessary code.

F. Presentation of recommendations to elected officials.

Shafer has experience presenting findings and recommendations to Southwest Florida policymakers. We presented the recommendations of the CCMPs to elected policymakers during the engagement cycles of National Estuary Program CCMP development for the CHNEP and SBEP. We presented the recommendations of the *Water Quality Playbook* to the Sarasota County Board of County Commissioners. We presented the findings of the Red Tide Impact and Response Study to the Policy Board of the TBEP. As Chair of the Environmentally Sensitive Lands Oversight Committee, Jennifer presented annual reports to the Sarasota County Board of County Commissioners.

G. Specialized Experience.

In addition to experiences detailed for community engagement and strategic planning, we have experience in GIS analysis and map design, website design/build, and graphic design—including illustration, photography, and layout. We have produced graphically rich books and websites to present plan information in an accessible and engaging format. These include CHNEP’s CCMPs, TBEP’s CCMP, *Water Quality Playbook*, *HOA Healthy Ponds Guide*, *The Green Living Toolkit*, and numerous other educational products.

Shafer excels at avoiding or mitigating conflict during meetings. Some key elements of our success include:

- Knowing the responsibilities of meeting roles and concepts of “process” vs “content”
- Using optimal process tools to get input, generate options, and evaluate options
- Having various skills to manage participation in meetings, including various structured conflict management techniques and when they are appropriate
- Knowing the benefits and limitations of direct collaborative processes and how to design and conduct a collaborative process
- Understanding framing problems and asking better questions
- Experience with the stages groups go through to become an effective team and why that’s important for managing conflict
- Understanding the dynamics of change and both personal and social psychologies of reactions to change
- Knowing how and when to engage the decision implementation phase of a discussion

VIII. VOLUME OF WORK WITH CHARLOTTE COUNTY

Shafer Consulting has no current or scheduled projects with Charlotte County. Within the last 24 months, Shafer Consulting has received \$49,000 in payment from Charlotte County (PO2024002319) for developing the Coastal & Heartland National Estuary Partnership’s Comprehensive Conservation and Management Plan.

IX. LOCATION

Shafer Consulting is conveniently located in downtown Sarasota, Florida, about 40 miles north of the project location. It is an easy and enjoyable commute between our office and the Islands and to Charlotte County offices at the Main Administration Building and the West County Annex. We are responsive to in-person meetings as well as virtual meetings, as needed.

X. LITIGATION

Shafer Consulting has NOT been named as a Defendant or co-defendant in a lawsuit in the last five years, or ever.

XI. MINORITY BUSINESS

Shafer Consulting is a Certified MBE.



**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
	Jennifer Shafer, PhD	18	Sarasota	Sarasota	Sarasota
	David Shafer, PhD	27	Sarasota	Sarasota	Sarasota
	Christine Quigley, MS	9	Sarasota	Sarasota	Sarasota
	Kendall Southworth, BA	5	Sarasota	Sarasota	Sarasota

2.	Magnitude of Company Operations				
	A) Total professional services fees received within last 24 months:			\$ 502,000	
	B) Number of similar projects started within last 24 months:			7	
	C) Largest single project to date:			\$ 520,060	

3.	Magnitude of Charlotte County Projects				
	A) Number of current or scheduled County Projects			0	
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$ 49,000	

4.	Sub-Consultant(s) (if applicable)	Location	% of Work to be Provided	Services to be Provided
	Quigley Environmental Consulting	Sarasota	20%	meeting/facilitation support, research/writing
	Kendall Southworth	Sarasota	10%	meeting/facilitation support, research/writing

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				
	NONE				

NAME OF FIRM Shafer Consulting LLC

(This form must be completed and returned)

6. Minority Business:Yes ☒ No ☐

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:

Shafer Consulting LLC is a certified MBE. Both subconsultants are woman owned and operated.

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. 1 Dated May 14 Addendum No. Dated Addendum No. Dated

Addendum No. 2 Dated May 19 Addendum No. Dated Addendum No. Dated

Type of Organization (please check one):

INDIVIDUAL
CORPORATION

() PARTNERSHIP ()
(X) JOINT VENTURE ()

SHAHER CONSULTING LLC

Firm Name

941-232-8222

Telephone

Fictitious or d/b/a Name

26-4540140

Federal Employer Identification Number (FEIN)

1530 Dolphin Street, Suite 4

Home Office Address

Sarasota, FL 34236

City, State, Zip

17

Number of Years in Business

n/a

Address: Office Servicing Charlotte County, other than above

Jennifer Shafer

Name/Title of your Charlotte County Rep.

Telephone

Jennifer Shafer

Name/Title of Individual Binding Firm (Please Print)

June 6, 2025

Jennifer Shafer

Signature of Individual Binding Firm

Date

jennifer@shaferconsulting.com

Email Address

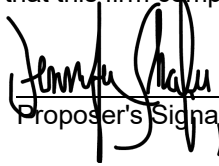
(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that SHAHER CONSULTING LLC
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

June 6, 2025

Date

(This form must be completed & returned)

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

Charlotte County Contract #20250360

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

Jennifer Shafer

Printed Name

President

Title

Shafer Consulting LLC

Nongovernmental Entity

June 6, 2025

Date

END OF PART IV

NAME OF FIRM Shafer Consulting LLC

(This form must be completed & returned)