

**CONTRACT NO. 20250217  
AGREEMENT BETWEEN CHARLOTTE COUNTY  
and CBRE, INC.  
for  
STRATEGIC MASTER SPACE PLAN**

**THIS AGREEMENT** (hereinafter the "Agreement"), is made and entered into by and between CHARLOTTE COUNTY, a political subdivision of the State of Florida, 18500 Murdock Circle, Port Charlotte, Florida 33948-1094, hereinafter the "County", and CBRE INC., 2121 Noah Pearl Street, Suite 300, Dallas, Texas 75201, hereinafter the "Consultant."

**WITNESSETH**

**WHEREAS**, the County has determined that it is necessary to retain a Consultant to provide professional architectural programming master space planning services to assist in the development of a Comprehensive Public Strategic Master Space Plan (the "Project"); and

**WHEREAS**, the Consultant has reviewed RFP No. 20250217 required pursuant to this Agreement and is qualified, willing and able to provide and perform all such services in accordance with its terms; and

**WHEREAS**, the County, through a selection process conducted in accordance with the requirements of law and County policy, has determined that it would be in the best interest of the County to award a contract to Consultant for the rendering of those services described in the RFP No. 20250217.

**NOW, THEREFORE**, the County and the Consultant, in consideration of the mutual covenants contained herein, do agree to implement the Project, as follows:

**ARTICLE 1.  
INCORPORATION OF DOCUMENTS**

1.1. RFP No. 20250217, issued by the County on January 13, 2025, and consisting of pages 1 through and including 20; Addendum #1 to RFP No. 20250217, issued by the County on January 27, 2025 and Addendum #2 to RFP No. 20250217, issued by the County on February 7, 2025 and the Proposal submitted by Consultant dated February 13, 2025 and; all filed with the Clerk of the Circuit Court of Charlotte County, Minutes Division, as RFP No. 20250217, are hereby specifically incorporated into and made a part of this Agreement as if same had been set forth at length herein. The Master Space Planning Proposal, Scope of Services, and Timeframe and Schedule is attached as **Exhibit A** and is specifically incorporated into and made part of this Agreement.

1.2. In the event of any conflict between the documents constituting this Agreement, the documents shall be given precedence in the following order:

- 1) This Agreement including **Exhibit A**, attached hereto;
- 2) RFP No.20250217.

## **ARTICLE 2.**

### **CONSULTANT'S SCOPE OF SERVICES**

2.1. Consultant agrees to perform all the services and provide all the materials for the development of the Project as described **Exhibit A - Scope of Services**.

2.2. Consultant agrees to provide its services and all materials for the Project described in **Exhibit A**, for the fees as contained in **Exhibit A**, and in the times allowed for performance of the project as set forth in **Exhibit A - Project Schedule**. The Consultant shall make no claims for additional compensation or damages owing to suspensions, delays, or hindrances which arise during the performance of this Agreement. Such suspensions, delays or hindrances may only be compensated for by an extension of time as the County may decide. However, such extension shall not operate as a waiver of any other rights of the County.

2.3. In the event that County desires Consultant to perform any additional services related to the Project not already contained in the Scope of Services, **Exhibit A**, the parties may enter into a mutually agreeable amendment to this Agreement to provide for the provision of such additional services by Consultant as may be agreed to by Consultant and County and payment therefore by County.

## **ARTICLE 3.**

### **COMPENSATION AND PAYMENT FOR CONSULTANT'S SERVICES**

3.1. County shall pay Consultant for those tasks and services provided in the Scope of Services actually performed by Consultant and in accordance with **Exhibit A**. The total payment to Consultant under this Agreement shall not exceed Seven Hundred Thirty-Three Thousand One Hundred Dollars and No Cents (\$733,100.00) without a written amendment executed by both parties. All services must be performed in accordance with Exhibit A and the terms of this Agreement.

3.2. Payment for services rendered by Consultant shall be made on a monthly basis in proportion to the percentage completed of those tasks listed in the Scope of Services. Percentage of services completed shall be subject to review and approval by the County's Facilities Director, or his/her designee.

3.3. Consultant shall submit all billings for payment of services rendered on a monthly basis to the County Purchasing Division for processing. Billings shall be detailed as to the nature of the tasks and services performed, the percentage of work completed, and shall refer to the specific tasks listed in the Scope of Services that were actually performed by Consultant. Billings shall include a summary of any amounts previously billed and any credits for amounts previously paid.

3.4. Consultant acknowledges that each billing must be reviewed and approved

by the County's Facilities Director, or his/her designee. Should the County's Facilities Director, or his/her designee, determine in good-faith that the billing is not commensurate with the percentage of the work completed for the month, the parties shall take commercially reasonable efforts to resolve any inaccuracies and Consultant shall adjust billing accordingly. However, Consultant shall be entitled to payment of any portion of a billing not in dispute.

3.5. County shall pay Consultant's monthly billings in accordance with Sections 218.70 through 218.80 Florida Statutes, the Local Government Prompt Payment Act.

#### **ARTICLE 4.**

#### **CONSULTANT'S RESPONSIBILITIES**

4.1. Consultant shall perform or furnish consulting and related services to a level of technical skill, ability, and diligence customarily provided by an experienced professional in his or her field of expertise when rendering the same services, and in accordance with sound principles and practices generally acknowledged by professionals in his or her field of expertise, as represented to the County, both orally and in writing, to be possessed by Consultant, all in accordance with the standards contained elsewhere in this Agreement and in accordance with generally accepted standards of professional consulting practice and with the laws, statutes, ordinances, codes, rules and regulations governing Consultant's profession. The same standards of care shall be required of any subconsultant or subcontractor engaged by Consultant.

4.2. Consultant shall, without additional compensation, correct and revise any errors, omissions, or other deficiencies in its work product, services, or materials arising from the negligent act, error or omission of Consultant or any subconsultant or subcontractor engaged by Consultant for one year after the completion of Consultant's services under this Agreement. The foregoing shall be construed as an independent duty to correct rather than a waiver of County's rights under any applicable statute of limitations. County review of, approval of, acceptance of, or payment for any of Consultant's work product, services, or materials shall not be construed to operate as a waiver of any of County's rights under this Agreement, or cause of action County may have arising out of the performance of this Agreement.

#### **ARTICLE 5.**

#### **OWNERSHIP AND USE OF DOCUMENTS**

5.1. All documents, data, studies, surveys, analyses, sketches, tracings, specifications, plans, designs, design calculations, details, computations, drawings, maps, models, photographs, reports, and other documents and plans resulting from Consultant's services under this Agreement specifically and uniquely for County are and shall become the property of and shall be delivered to County without restriction, cost or limitation as to use regardless of the format of the document (paper or electronic). However, any use subsequent to or other than the specific project for which such items were created, shall be at sole risk of County.

5.2. Consultant agrees that any software, computer systems and databases used for providing the documents necessary to this Agreement shall be compatible with existing County software and systems.

## **ARTICLE 6.**

### **COUNTY'S RESPONSIBILITIES**

6.1. County shall perform the responsibilities contained in this Article 6 in a timely manner so as not to delay the services of Consultant.

6.2. County shall furnish to Consultant, upon request of Consultant and at County expense, all existing studies, reports and other available data information pertinent to the services to be performed or necessary, in the reasonable opinion of Consultant, for Consultant to perform the services under this Agreement which are within the County's possession.

6.3. County shall provide reasonable access and entry to all public property required by Consultant to perform the services described in this Agreement. All such access and entry shall be provided at County expense. County shall also use reasonable efforts to obtain permission for reasonable access and entry to any private property required by Consultant to perform the services described in this Agreement.

## **ARTICLE 7.**

### **EFFECTIVE DATE/ TERM/ TERMINATION**

7.1. The Effective Date of this Agreement is the date on which this Agreement is signed by both parties.

7.2. The term of this Agreement shall begin on the Effective Date and continue through the completion of the Project, in accordance with **Exhibit A**, or through such other time as the parties may agree through an Amendment to this Agreement. Consultant's services shall be deemed complete when Consultant provides all products or services contained in the Scope of Services, **Exhibit A**, and required under this Agreement or any amendment hereto, and County accepts such services and products as satisfactory, unless otherwise terminated in accordance herewith.

7.3. The Consultant shall be responsible for notifying the County promptly whenever a delay is anticipated or experienced, including a delay in approval by any governmental agency having jurisdiction over the Project. The County shall allow the Consultant to extend the Project Schedule for valid, documented delays. The County shall be the sole determiner of the validity of the delays.

7.4. The County shall have the right at any time upon thirty (30) calendar days' written notice to the Consultant to terminate the services of the Consultant and, in that event, the Consultant shall cease work and shall deliver to the County all documents, (including reports, designs, specifications, and all other data) prepared or obtained by the Consultant in connection with its services. The County shall, upon receipt of the aforesaid

documents, pay to the Consultant, and the Consultant shall accept as full payment for its services, fees for all tasks completed in accordance with the Scope of Services.

7.5. In the event that the Consultant has abandoned performance under this Agreement, then the County may terminate this Agreement upon three (3) calendar days' written notice to the Consultant indicating its intention to terminate. The written notice shall state the evidence indicating the Consultant's abandonment. Payment for services performed prior to the Consultant's abandonment shall be as stated in Article 3 above.

#### **ARTICLE 8.**

#### **NO CONTINGENT FEES**

8.1. Consultant certifies that it has not employed or retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for Consultant any fee, commission, percentage, gift or other consideration contingent upon or resulting from the award or making of this Agreement. For the breach or violation of this provision, County shall have the right to terminate the Agreement without liability at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift or consideration.

#### **ARTICLE 9.**

#### **NOTICES**

9.1. Any notice required or permitted to be sent hereunder shall be sent certified mail, return receipt requested to the parties at the addresses listed below:

Consultant: CBRE, Inc.  
Name: Eva Garza  
Address: 777 Brickell Ave., Ste. 1100  
Miami, FL 33131

County: Purchasing Division  
Name: Kimberly A. Corbett  
Sr. Division Manager  
Address: 18500 Murdock Cir., Ste. 344  
Port Charlotte, FL 33948

9.2. Consultant shall immediately notify County of any changes in address.

#### **ARTICLE 10.**

#### **TRUTH-IN-NEGOTIATION CERTIFICATE**

10.1. In accordance with Section 287.055 Florida Statutes and Charlotte County Resolution 2003-059, signature of this Agreement by Consultant shall act as the execution of a truth-in-negotiation certificate stating that wage rates and other factual unit costs supporting the compensation of this Agreement are accurate, complete, and current at the time of contracting. The original contract price and any additions thereto shall be adjusted to exclude any significant sums by which County determines the contract price was increased due to inaccurate, incomplete, or noncurrent wage rates and other factual unit costs. All such contract adjustments shall be made within one (1) year following the end

of this Agreement.

**ARTICLE 11.**  
**ASSIGNMENT**

11.1. This Agreement, or any interest herein, shall not be assigned, transferred or otherwise encumbered, under any circumstances by Consultant without the prior written consent of County. Further, no portion of this Agreement may be performed by subcontractors or subconsultants without written notice to and approval of such action by County.

**ARTICLE 12.**  
**EXTENT OF AGREEMENT/ SEVERABILITY / MODIFICATION**

12.1. This Agreement represents the entire and integrated agreement between the County and Consultant and supersedes all prior negotiations, representations or agreement, either written or oral.

12.2. In the event any provision of this Agreement shall be held invalid and unenforceable, the remaining provisions shall be valid and binding upon the parties. One or more waivers by either party of any breach of any provision, term, condition or covenant shall not be construed by the other party as a waiver of any subsequent breach.

12.3. No modification, amendment or alteration in the terms or conditions contained herein shall be effective unless contained in a written document executed by both parties.

12.4. This is a nonexclusive contract. The County has the right to enter into contracts with other consultants for the providing of any services.

**ARTICLE 13.**  
**GOVERNING LAW/ VENUE**

13.1. This Agreement shall be governed and construed in accordance with Florida law. In the event any litigation arises between the parties in connection with this Agreement, venue for such litigation shall lie exclusively in or for Charlotte County, Florida.

**ARTICLE 14.**  
**INDEPENDENT CONTRACTOR STATUS**

14.1. Consultant is an independent contractor and is not an employee, servant, agent, partner or joint venturer of the County. Neither the County nor any of its employees shall have any control over the conduct of Consultant or any of Consultant's employees, except as herein set forth, and Consultant expressly warrants not to represent at any time or in any manner that Consultant or any of Consultant's agents, servants or employees are in any manner agents, servants or employees of the County. It is understood and agreed that Consultant is and shall at all times remain as to the County, a wholly independent contractor and that Consultant's obligations to the County are solely as

prescribed by this Agreement.

**ARTICLE 15.**  
**AUDIT AND RECORDS REQUIREMENTS**

15.1. Consultant shall maintain books, records, documents, and other evidence directly pertaining to or connected with the services under this Agreement which shall be, upon reasonable advanced written notice to Consultant, available and accessible at Consultant's local offices for the purpose of inspection, audit, and copying during normal business hours by the County, or any of its authorized representatives. Such records shall be retained for a minimum of five (5) years after completion of the services. Prior to destruction of any records, the Consultant shall notify the County and deliver to the County any records the County requests. Consultant shall require all subcontractors to comply with the provisions of this paragraph by insertion of the requirements hereof in a written contract agreement between Consultant and the subcontractor.

15.2 If the records are unavailable locally, it shall be the Consultant's responsibility to ensure that all required records are provided at the Consultant's expense including payment of travel and maintenance costs incurred by the County's authorized representatives or designees in accessing records maintained out of the County. The direct costs of copying records, excluding any overhead cost, shall be at the County's expense.

15.3. Pursuant to Section 119.0701 of the Florida Statutes, contractors acting on behalf of the County must comply with the public records laws, specifically: a) keep and maintain public records required by the County to perform the contracted services; b) upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 of the Florida Statutes or as otherwise provided by law; c) ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract; and d) upon completion of the contract, keep and maintain all public records required by the County to perform the service, and meet all applicable requirements for retaining public records.

**IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO RETAIN AND PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT (941) 743-1441, E-MAIL TO [RECORDS@CHARLOTTECOUNTYFL.GOV](mailto:RECORDS@CHARLOTTECOUNTYFL.GOV), 18500 MURDOCK CIRCLE, BLDG. B, SUITE 200, PORT CHARLOTTE, FLORIDA 33948.**

**ARTICLE 16.**  
**INDEMNIFICATION**

16.1. Consultant shall indemnify and hold harmless the County, its Commissioners, officers, employees, agents and volunteers from and against any and all liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Consultant and other persons employed or utilized by the Consultant in the performance of this Agreement.

**ARTICLE 17.**  
**EMPLOYEE RESTRICTIONS**

17.1. Charlotte County will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contains in 8 U.S.C. Section 1324a [Section 274A of the Immigration and Nationality Act ("INA")]. The County shall consider employment by any Contractor of unauthorized aliens a violation of Section 274A of the INA. Such violation by the Contractor of the employment provisions contained in Section 274A of the INA shall be grounds for termination of this Agreement by the County.

17.2. Pursuant to Section 448.095 of the Florida Statutes, all persons or firms entering into contracts with Charlotte County are required to register with, and use, the E-Verify system of the U.S. Department of Homeland Security to electronically verify the employment eligibility of all newly hired employees. The County may terminate this Agreement for failure on the part of the Contractor to use E-Verify. Contract termination for failure to use E-Verify is not considered a breach of contract pursuant to s. 448.095(5)(c)3, *Fla. Stat.*

**ARTICLE 18.**  
**SCRUTINIZED VENDORS**

18.1. Pursuant to Section 287.135(3)(b) of the Florida Statutes, Charlotte County may, at its sole option, terminate any agreement in any amount if the Contractor is found to have been placed on the *Scrutinized Companies that Boycott Israel List*, or is engaged in a boycott of Israel.

**ARTICLE 19.**  
**MISCELLANEOUS**

19.1 EXCEPT FOR LIABILITY ARISING FROM (I) CONSULTANT'S INDEMNIFICATION OBLIGATIONS UNDER THIS AGREEMENT, (II) (I) CONSULTANT'S BREACH OF CONFIDENTIALITY OR DATA SECURITY OBLIGATIONS, OR (III) CONSULTANT'S GROSS NEGLIGENCE OR WILLFUL MISCONDUCT, CONSULTANT'S AGGREGATE LIABILITY UNDER THIS AGREEMENT SHALL NOT EXCEED THE TOTAL AMOUNT OF COMPENSATION ACTUALLY PAID TO CONSULTANT BY THE COUNTY PURSUANT TO THIS AGREEMENT.



IN NO EVENT SHALL EITHER PARTY BE LIABLE TO THE OTHER FOR PUNITIVE OR EXEMPLARY DAMAGES. HOWEVER, THIS LIMITATION SHALL NOT BE CONSTRUED TO WAIVE THE COUNTY'S RIGHT TO RECOVER CONSEQUENTIAL OR INCIDENTAL DAMAGES TO THE EXTENT SUCH DAMAGES RESULT FROM CONSULTANT'S BREACH OF THE STANDARD OF CARE, PERFORMANCE OBLIGATIONS, OR DUTIES ARISING UNDER FLORIDA LAW.

19.2 INTENTIONALLY OMITTED.

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**IN WITNESS WHEREOF**, the parties hereto have entered into this Agreement as of the date and year below written.

WITNESSES:

**CBRE, Inc.**

Signed By: \_\_\_\_\_

Signed by: \_\_\_\_\_

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

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

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Signed By: \_\_\_\_\_

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

Date: \_\_\_\_\_

**BOARD OF COUNTY COMMISSIONERS  
OF CHARLOTTE COUNTY, FLORIDA**

ATTEST:

Roger D. Eaton, Clerk of the Circuit  
Court and Ex-Officio Clerk to the  
Board of County Commissioners

By: \_\_\_\_\_  
Joseph M. Tiseo, Chairman

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Deputy Clerk

APPROVED AS TO FORM  
AND LEGAL SUFFICIENCY:

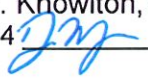
By: \_\_\_\_\_  
Janette S. Knowlton, County Attorney  
LR25-0524 

Exhibit List:

Exhibit A - Scope of Services, Strategic Master Space Plan Proposal, Timeframe and Schedule

# Strategic Master Space Plan

RFP# 20250217

CBRE + Harvard Jolly | PBK Team response for  
Charlotte County

June 27, 2025

# 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 as well as bringing the depth and breadth of our global business to drive better outcomes for our clients. 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. We 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,



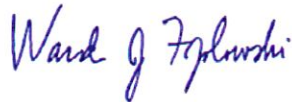
**Eva Garza**

AICP, LEED AP & Prosci  
CBRE | Americas Consulting  
Senior Managing Director



**Nnenna Alintah**

CBRE | Americas Consulting  
Senior Managing Director



**Ward Friszolowski**

AIA  
Harvard Jolly | PBK  
President, COO

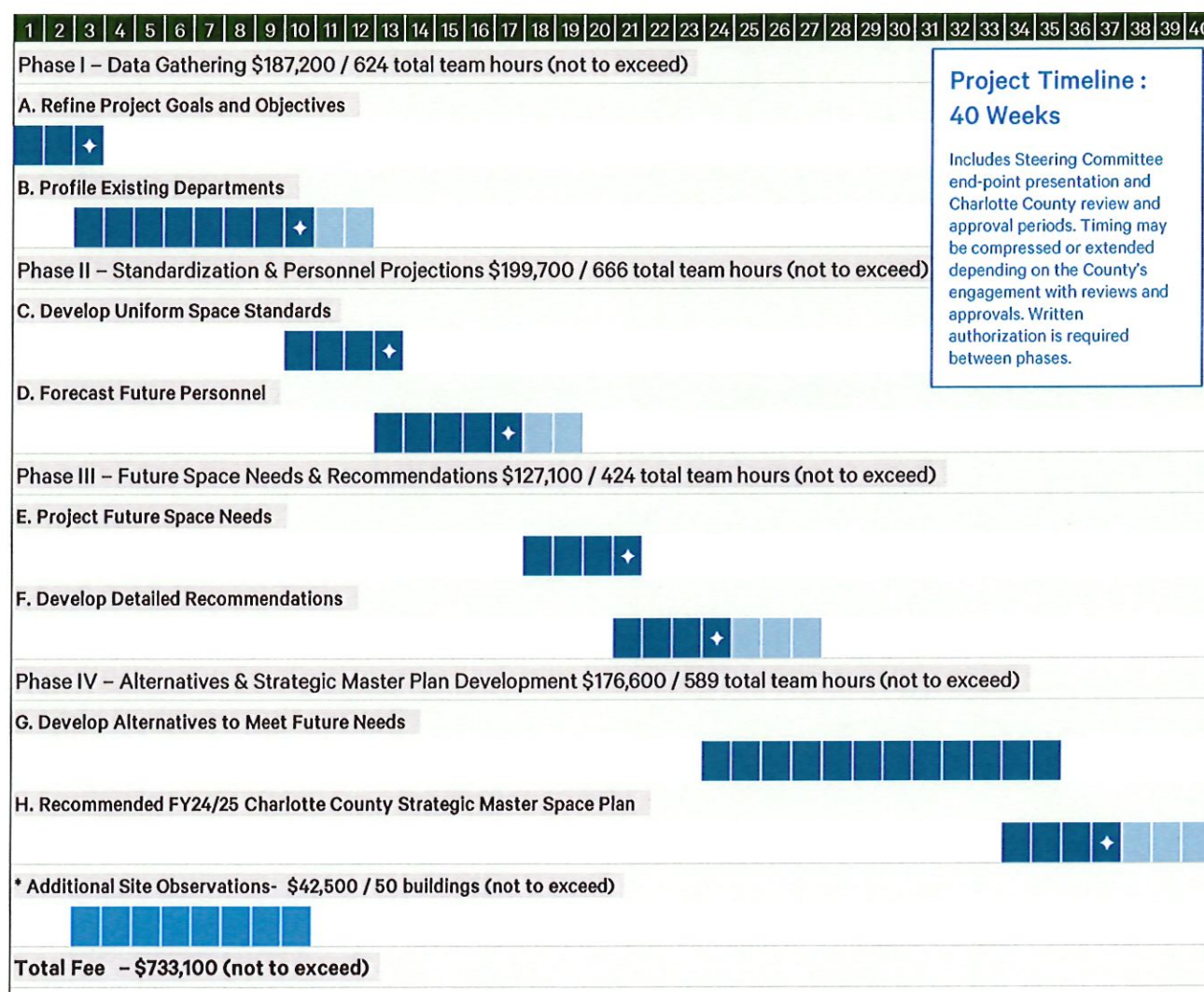


## Abbreviated Project Schedule and Cost

Our approach ensures flexibility, timely responses, and quick turnarounds, all of which are critical for project success. Each phase includes an end-point steering committee and board presentation. Written authorization from the County is required before proceeding to the next phase.

We can deliver the scope outlined in the timeline below and detailed in the Charlotte County RFP for a fee not to exceed \$733,100 over approximately 40 weeks and (excluding County approvals that may pause progress between phases). The total estimated effort required for the project is 2,302 team hours. Fees are structured by phase based on the total team hours spent and will be invoiced as such. These fees are not to exceed the figures specified for each phase.

To address a requirement to conduct 50 additional site observations, the CBRE Team will require written approval from the County and has priced these services at \$42,500 as illustrated in the chart below and described in the following pages for the County's consideration. This amount is included in the total project fee above. The CBRE Team's proposed schedule and fees have been divided into four project phases as follows:



Hourly Rates	
Project Executive	\$450
Engagement Manager	\$300
Strategist	\$225

Hourly Rates	
Project Executive	\$450
Engagement Manager	\$300
Strategist	\$225

### Additional Scope

## Project Milestones

**County & Board  
Presentations, Review &  
Approvals**

## Phase I – Data Gathering \$187,200 / 624 total team hours (not to exceed)

### A. Refine Project Goals and Objectives - 2-3 weeks

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 (RFI)

CBRE will issue 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 subdepartment, floorplans, org charts, the County's guiding principles and current space allocation standards.

#### Project Kick Off

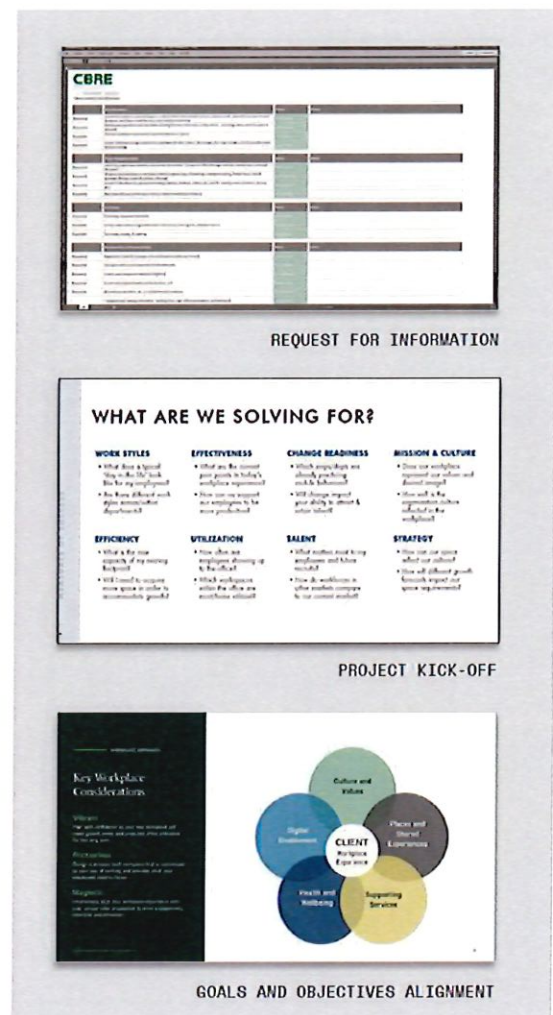
The CBRE Team and the Charlotte County core team will schedule a one-hour working session to include all project team and steering committee members to kick-off the project, establish project objectives, understand challenges and risks, and uncover potential opportunities. We will use this time to align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

#### Bi-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).





## B. Profile Existing Departments –6 - 8 weeks

As we develop departmental profiles, we will gather immediate and future requirements across departments to accurately profile their existing and projected headcount, space requirements, and departmental adjacencies to map departmental needs in aggregate and their impact on future space needs.

### Questionnaire

CBRE will prepare a questionnaire for departmental leaders to gather specific data on current and projected headcount, workspace needs, collaboration requirements, and specialty space needs. This set of targeted questions will be reviewed and approved by the Charlotte County core team prior to departmental leader distribution. These questionnaires shall be distributed by the Charlotte County core team and should be filled out in advance of departmental interviews.

### Leader Interviews (25 estimated)

CBRE will conduct 60-minute, interactive departmental interviews with departmental leads across 14 Board of County Commissioners departments, 9 State of Florida and Elected Officials departments and 2 Charlotte County departments with the goal of understanding workflows, space needs, and evolving business processes. These interviews will be conducted virtually (via Teams or Zoom) and scheduled by Charlotte County core team members.

### Space Observations

The CBRE team will spend time on-site observing 50 buildings, as conjunctively prioritized with the Charlotte County core team, to assess how employees use these spaces and identify potential gaps in employee and public/customer experience. Observations will enable us to engage in meaningful discussions with departmental leaders. These observations will be conducted in person.

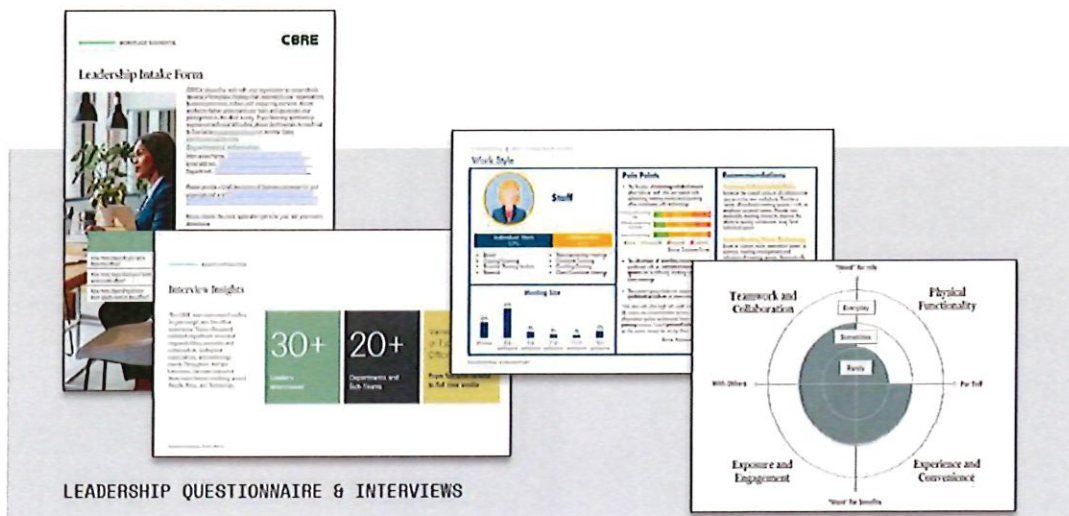
### Departmental Profiles

Using data collected from departmental questionnaires, interviews, and observations, we will create departmental profiles that outline both immediate and future requirements. These profiles will be reviewed with Charlotte County during our weekly call before our meeting with the steering committee.

### Steering Committee Progress Review Meeting

CBRE and the Charlotte County core team will schedule a 90-minute progress review meeting with the steering committee members to discuss the departmental profiles. This meeting will offer an opportunity to validate departmental headcount projections, space requirements and identify discrepancies between departmental estimates and the approved growth.

Departments to be interviewed	
Board of County Commissioners	Administration Communications Department County Attorney Budget & Administrative Services Community Development Community Services Economic Development Facilities Construction & Maintenance Human Resources Human Services Public Works Public Safety Tourism Development Utilities
State of Florida and Elected Officials	Health Department Tax Collector Supervisor of Elections Property Appraiser Clerk of Courts including Satellite Offices Sheriff Medical Examiner MPO (Metropolitan Planning Organization) Judicial System
Charlotte County	Department occupying leased space Department occupying owned space

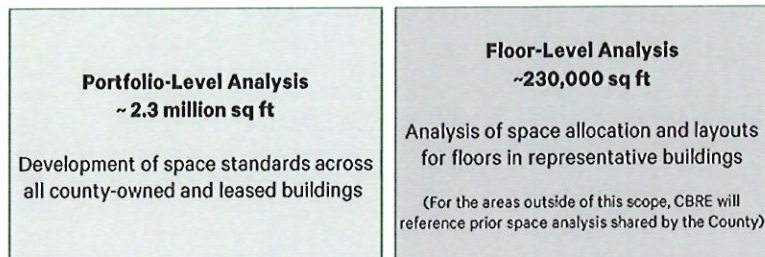




## Phase II – Standardization & Personnel Projections \$199,700 / 666 total team hours (not to exceed)

### Develop Uniform Space Standards for County portfolio– 3-4 weeks

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



### Space Analysis

CBRE 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.

### Industry Benchmarking & Research

CBRE 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

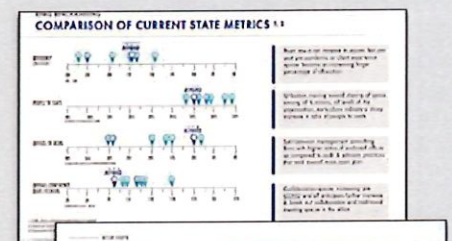
The space standards developed by The CBRE Team for Charlotte County will represent a set of comprehensive and departmentally relevant planning and space allocation guidelines to support your organization's future workplace. These standards shall be based on departmental functions while bringing consistency across County facilities.

### Steering Committee Progress Review Meeting

CBRE 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 CBRE, 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. This can be virtual or in-person.



SPACE ANALYSIS



WORKPLACE SPACE STANDARDS



### C. Forecast Future Personnel – 4-5 weeks

During the personnel forecasting tasks, we will use the information collected from departmental interviews to create growth projections.

## Growth Modeling

CBRE 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. CBRE's analysis will show department and sub-department detail on a yearly basis and be integrated into departmental profiles. CBRE 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 CBRE'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

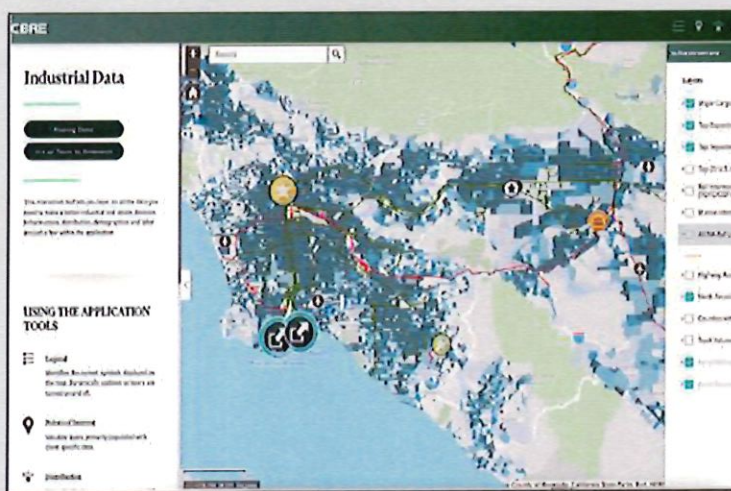
Based on data analysis at the portfolio and departmental level, CBRE will develop a summary report comprising future recommendations.

## 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™



## Phase III – Future Space Needs & Recommendations \$127,100 / 424 total team hours (not to exceed)

### D. Project Future Space Needs – 3-4 weeks

#### 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

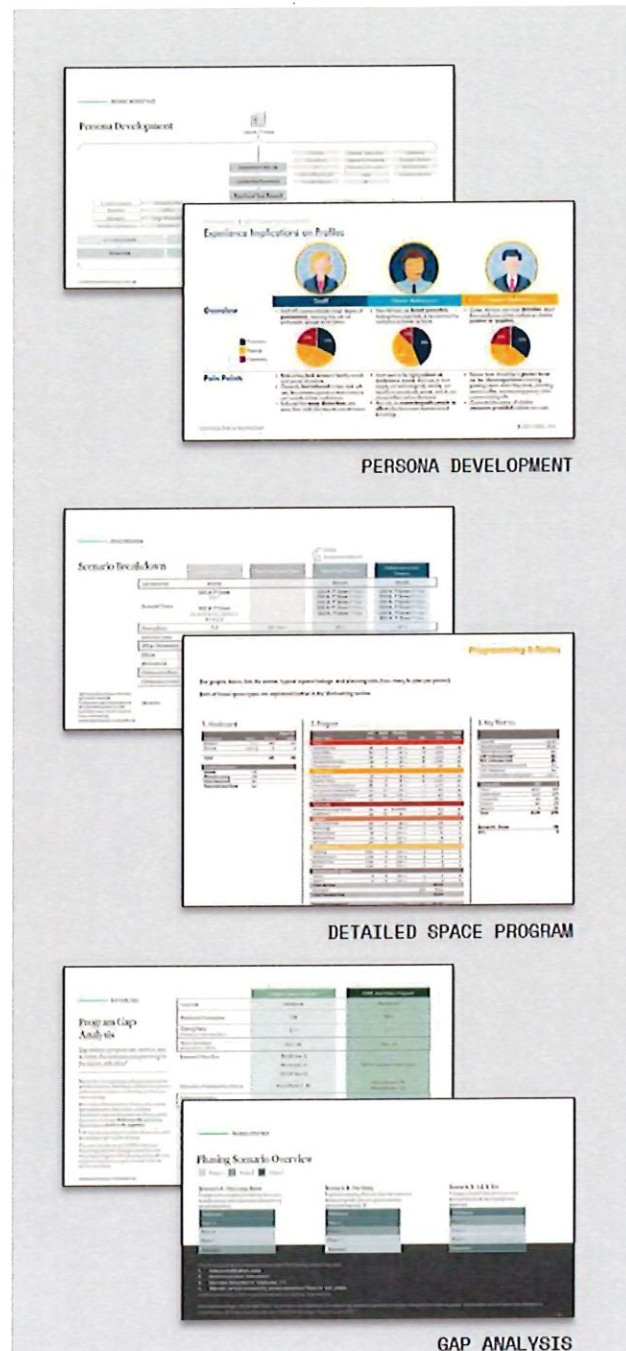
The CBRE Team will create a comprehensive space program based on departmental profiles and headcount growth modeling. This program will outline the required workspaces, collaboration areas, and support spaces for each department and sub-department. It will also include summaries for the Board of County 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 horizon.

#### 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.

#### Steering Committee Progress Review Meeting

CBRE and the Charlotte County core team will schedule a 90-minute progress review meeting with steering committee members to review departmental personas, the detailed program of requirements and gap analysis. This meeting will provide CBRE, the Charlotte County core team and the steering committee, with an opportunity to validate findings and build consensus around a common vision for Charlotte County's facilities. This can be virtual or in-person.









## Phase IV – Alternatives & Strategic Master Plan Development \$176,600 / 589 total team hours (not to exceed)

### F. Develop Alternatives to Meet Future Needs – 8-12 weeks

#### 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.

#### Organizational and Facility 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.

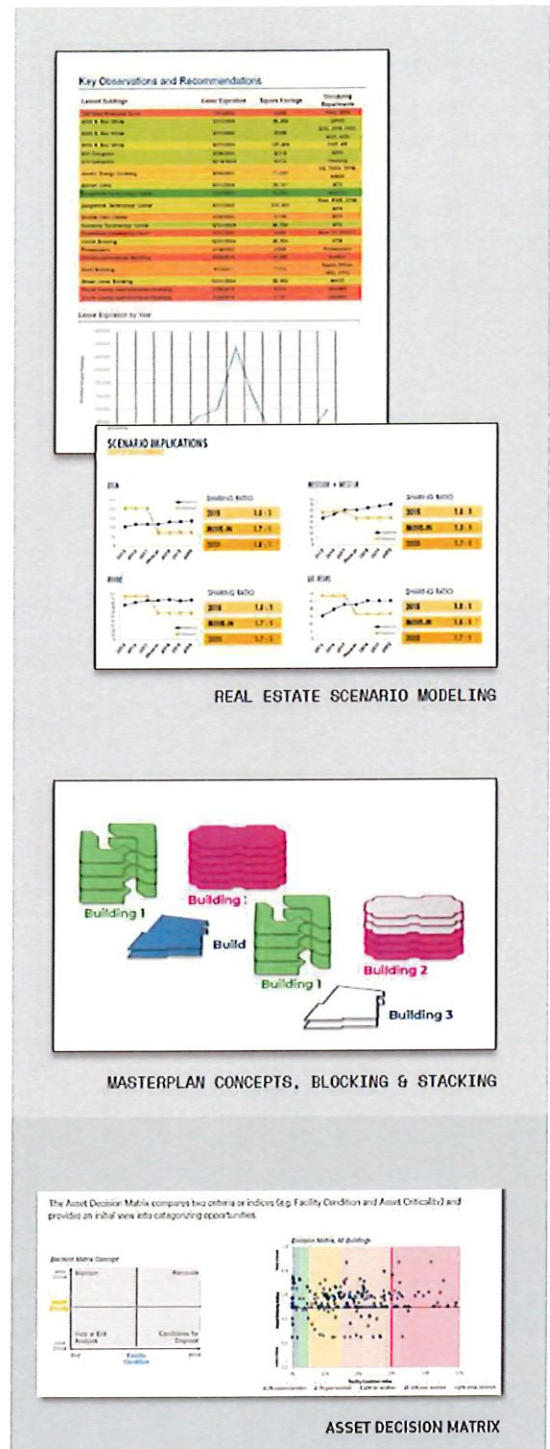
We will develop a base case that reflects the status quo, serving as a benchmark for comparison with all alternative scenarios. Potential scenarios may include downsizing existing locations, consolidating multiple facilities into either existing or new locations, selling underutilized facilities or vacant 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.

#### Steering Committee Progress Review Meeting

CBRE and the Charlotte County core team will schedule a 90-minute progress review meeting with steering committee members to review optimization and regionalization opportunities, facility modeling and master plan blocking & stacking. This meeting represents an opportunity to validate findings and build consensus around a common vision for Charlotte County's facilities and can be virtual or in-person.





## G. Recommended FY24/25 Charlotte County Strategic Master Space Plan – 2-4 weeks

### 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. CBRE will also develop a prioritization matrix for capital investments (based on FCA data available).

### Develop Implementation Strategy

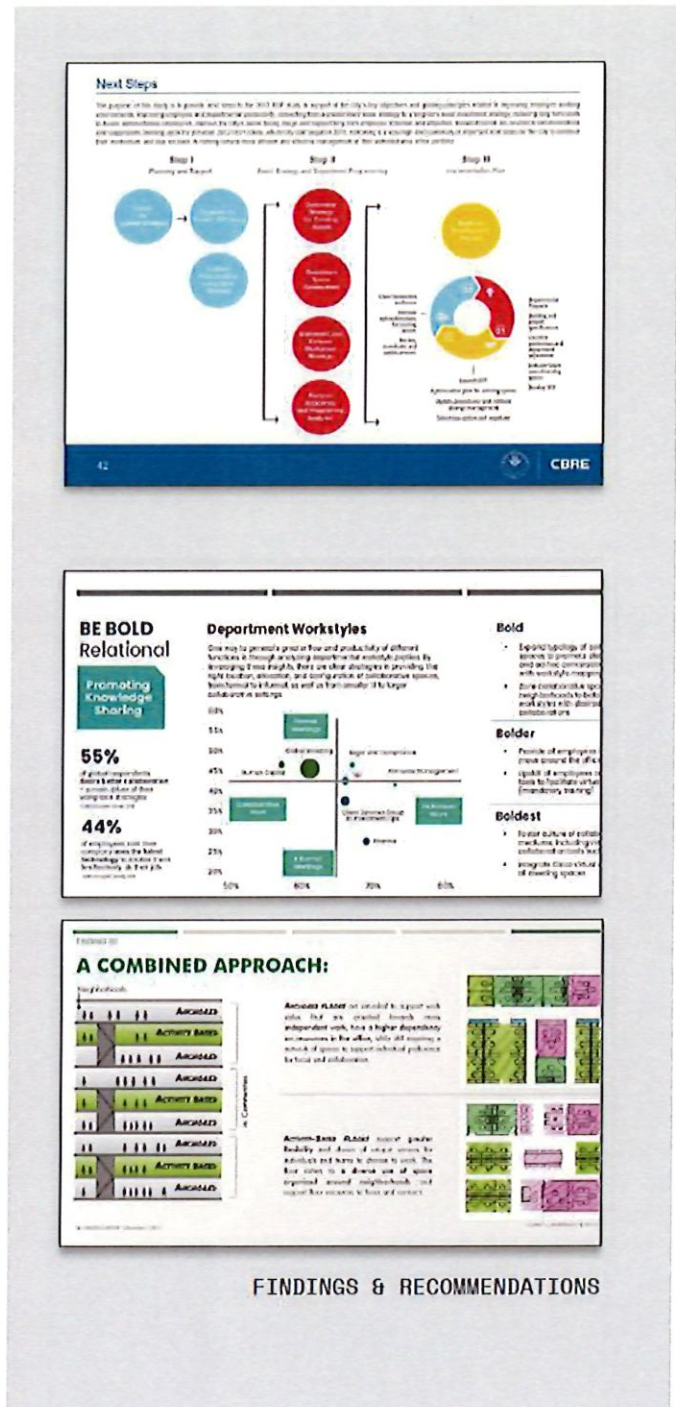
Based on all data gathered to date and steering committee vision, The CBRE Team will develop a phased implementation strategy for departmental workplace changes, roll-out of new space allocation standards, attainment of ideal adjacencies and any necessary building restacks and space reconfiguration. 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 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.



## Additional Scope





To address a requirement to conduct 50 additional site observations, the CBRE Team will require written approval from the County and has priced these services at \$42,500 for the County's consideration. Each site observation is priced at \$850. This fee is already included in the total project fee.

### **PH I – Additional Site Observations – approx. 8-weeks \$42,500 (not to exceed)**

#### **Space Observations (50 additional)**

The CBRE Team will conduct 50 site observations in addition to the 50 site observations included in our scope of work.

These additional 50 site observations should be conducted around the time of the on-site visit scheduled for Phase I to document existing office spaces. Site observations shall be documented as illustrated in the form included in this page.

OBSERVATION REPORT			
FACILITY ADDRESS: _____			
SURVEY DATE: _____			
FACILITY TYPE/GENERAL USE: _____			
FACILITY SQUARE FOOTAGE: _____			
NUMBER OF STORIES: _____			
YEAR BUILT: _____			
	POOR	MODERATE	GOOD
GENERAL SITE CONDITION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GENERAL EXTERIOR CONDITION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GENERAL INTERIOR CONDITION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMENTS: _____			
_____			
EXTERIOR SAMPLE PHOTOS			
			
INTERIOR SAMPLE PHOTOS			
			
ARCHITECTURE & ENGINEERING & PLANNING & TECHNOLOGY & FACILITY CONSULTING & BRANDING			
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