BLUEPRINT INTERGOVERNMENTAL AGENCY

OFFICE OF ECONOMIC VITALITY

BOARD OF DIRECTORS MEETING

September 24, 2026
3:00 p.m.
City Commission Chambers

Chair: Curtis Richarson

Agenda: Regular Meeting and Public Hearing

I. AGENDA MODIFICATIONS

PAGE

II. CITIZENS TO BE HEARD

In Person: Citizens desiring to speak must fill out a Speaker Request Form. The Chair reserves the right to limit the number of speakers or time allotted to each. Speakers are limited to 3 minutes.

Written Comments: Please provide written public comment by emailing Comments@BlueprintIA.org until 5 p.m. on September 23, 2026. This will allow ample time for comments to be provided to the IA Board in advance of the meeting. Comments submitted after this time will be accepted and included in the official record of the meeting.

Live Comments via WebEx: If you wish to provide comments live during the IA Board meeting via WebEx, please register to join at www.blueprintia.org by 5 p.m. on September 23, 2026, and WebEx meeting access information will be provided to you via email. Speakers are limited to 3 minutes.

III. INFORMATIONAL ITEMS/PRESENTATIONS

- Receipt and File: **3**
  - Blueprint Infrastructure Community Engagement Update
  - Draft Citizens Advisory Committee September 10, 2026 Minutes

IV. CONSENT

1.	Approval of the June 11, 2026, Blueprint Intergovernmental Agency Board of Directors Workshop and Meeting Minutes	**11**
2.	Approval of the 2027 Blueprint Intergovernmental Agency Meeting Schedule	**25**
3.	Acceptance of the New Hope Community Historical Survey	**29**
4.	Status Report on the Impact of Technology on the Local Workforce	**119**
5.	Approval of Appointments and Reappointments to the Economic Vitality Leadership Council	**149**

V. GENERAL BUSINESS

6.	Acceptance of a Status Update on the Northwest Connector Corridor: Tharpe Street Project and Information on the Process for Blueprint Infrastructure Projects Reprioritization	**167**
7.	Consideration of a Proposed Small Business Enterprise (SBE) Policy	**187**

VI. DIRECTOR DISCUSSION ITEMS

VII. PUBLIC HEARING 5:00 p.m.

8.	Second and Final Public Hearing on the Proposed Fiscal Year 2027 Operating Budget and Fiscal Year 2027 – 2031 Five-Year Capital Improvement Program Budget for the Blueprint Intergovernmental Agency and Approval of Budget Resolutions	**291**

VIII. ADJOURN

NEXT BOARD OF DIRECTORS MEETING: November 12, 2026

In accordance with the Americans with Disabilities Act and Section 286.26, Florida Statutes, persons needing a special accommodation to attend this meeting should contact Shelonda Meeks, Blueprint Office Manager, 315 South Calhoun Street, Suite 450, Tallahassee, Florida, 32301, at least 48 hours prior to the meeting. Telephone: 850-219-1060; or 1-800-955-8770 (Voice) or 711 via Florida Relay Service.

Blueprint Intergovernmental Agency Board of Directors Meeting
Receipt and File: Blueprint Infrastructure Community Engagement Update
September 24, 2026

This document provides the IA Board with information regarding recent and upcoming public engagement activities for Blueprint Infrastructure.

RECENT & UPCOMING ENGAGEMENT

Blueprint projects employ a range of engagement strategies tailored to residents, businesses, homeowner associations, neighborhood associations, and project working groups. This is accomplished through targeted outreach efforts, such as engaging stakeholders in small group settings or one-on-one interactions to disseminate information and facilitate discussions pertaining to project ideas or concerns. Examples of stakeholder engagement initiatives include door-to-door outreach to businesses or residences, participation in homeowner/neighborhood association gatherings, and the organization of virtual meetings. The Blueprint team remains accessible to the community, with an open invitation for stakeholders to connect with any staff member.

Project-related public engagement activities that have transpired or are scheduled between June 11, 2026, and November 12, 2026, (spanning the period between the last and forthcoming IA Board meetings) encompass the following initiatives.

Airport Gateway

- Construction for Airport Gateway Segment G-1 (Springhill Road from Capital Circle Southwest to south of Windy Pines Lane) is complete. Right of way acquisition has begun for Segment G-2 (Springhill Road from Windy Pines Lane to Springsax Road), and staff is coordinating with property owners and tenants for the necessary acquisitions.

Bike Route System: SW Area Connector

- A contractor has been selected for construction of the SW Area Connector project (Dale Street from Villamore Avenue to McElroy Street and McElroy Street from Dale Street to Eisenhower Street). Construction is expected to begin in late 2026. A letter has been mailed to residents in the area informing them of upcoming construction and providing project manager contact information.

Capital Cascades Trail Segment 4

- Construction of the Capital Cascades Trail Segment 4 is expected begin in Fall 2026 and is expected to last approximately 18 months. Public notices for traffic pattern changes will be communicated as necessary.

Market District Placemaking

- Construction of the Market District Park is ongoing and expected to be completed by early 2027.
- In June 2026, Director Autumn Calder and Project Manager Susan Tanski met with representatives from the Market District Merchants Association to present

an update on the Market District Placemaking: Pedestrian Safety and Connectivity project. Participants discussed enhanced landscaping, improved lighting, a three-way stop at the intersection of Maclay Boulevard and Market Street, and construction timing.

North Monroe Gateway

- Construction of two landscaped medians between Allen Road and John Knox Road was completed in August 2026. Temporary lane closures were publicly noticed.

Northeast Corridor Connector: Bannerman Road

- Construction of the intersection improvements at Bull Headley Road and Bannerman Road is anticipated to begin in fall 2026. Public notices for traffic pattern changes will be communicated as necessary.
- Blueprint staff tables at the September 18 Block Party at Bannerman Crossing where residents were able to talk with the project team to learn more about the Bannerman Road project. Blueprint staff also plans to attend the scheduled October 30 Block Party.

Northeast Gateway: Welaunee Boulevard

- Phase 1 – South of I-10: Construction is ongoing and is anticipated to be complete in early 2027.
- Phase 1A – Interstate 10 Overpass: Construction for the overpass is ongoing with construction scheduled to continue through 2027. Public notices for traffic pattern changes on I-10 will continue to be communicated as necessary.
- Phase 2 - Clarecastle Way Sidewalk: Construction began in January 2026 and is anticipated to be complete in late 2026. A postcard mailing was sent to residents in the area in late 2025 informing them of upcoming construction and providing project manager contact information.

Orange-Meridian Placemaking

- Construction of Orange-Meridian Park is ongoing and expected to be completed by late 2026. Blueprint staff will coordinate with City and County communications departments on a potential press release or ribbon cutting ceremony as the park nears completion.

The Blueprint Infrastructure Quarter 2 2026 Project Status Report was published in July 2026 on the Blueprint website. The status of all projects is updated regularly and appears on their respective web pages.

- Airport Gateway
- Alternative Sewer Solutions
- Bike Route System
- Capital Cascades Trail Segment 4
- Capital Circle Southwest
- College Avenue Placemaking

- Fairgrounds Beautification and Improvement
- Florida A&M University Entry Points
- Greenways Master Plan Implementation
- Lake Jackson Greenway
- Lake Lafayette and St. Marks Regional Linear Park
- Magnolia Drive Trail
- Market District Placemaking
- Midtown Placemaking
- Monroe-Adams Placemaking
- North Monroe Gateway
- Northeast Corridor Connector: Bannerman Road
- Northeast Gateway: Welaunee Boulevard
- Northeast Park
- Northwest Connector Corridor: Tharpe Street
- Orange Avenue Widening
- Orange-Meridian Placemaking
- Southside Gateway
- Westside Student Gateway

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Blueprint Intergovernmental Agency
Citizens Advisory Committee
Meeting Minutes

Date: October 29, 2026
To: Citizens Advisory Committee
From: Artie White, PLACE Director
Subject: Summary CAC Meeting Minutes for September 10, 2026

Committee Members present:

Chris Daniels, Chair	Mary Glowacki
Danielle Irwin	Deborah Burr
Byron Greene	William McCloud
Leroy Peck	Rod McQueen
Rod McQueen	Hollie Myers

Committee Members absent:

Whitney Doyle	Fred Varn
Gloria Pugh	Dr. Elaine Bryant

The regular meeting of the Citizens Advisory Committee was called to order at 4:34 p.m. on September 10, 2026, at the Blueprint Intergovernmental Agency offices by Chair, Chris Daniels.

I. AGENDA MODIFICATIONS

There were no modifications to the published agenda.

II. CITIZEN COMMENTS

There were no citizen comments.

PRESENTATION / INFORMATION ITEMS

Q2 2026 Blueprint Infrastructure Project Status Report

Blueprint Planner II Alex Delgado provided an overview of Blueprint project progress during the second quarter of 2026 and highlighted several projects that reached key milestones, including completion of Airport Gateway: Segment G-1, Debbie Lightsey Nature Park: Mountain Bike Trail, Magnolia Drive Trail: Phase 2, North Monroe Gateway: John Knox Medians, and the Southwood Greenway: Tram Road Trail.

Presentation on the New Hope Community Historical Survey

Blueprint Planner II Michaela McKinney-Hollister provided an overview of the New Hope Community Historical Survey, including the four components of the project: the New Hope Community Historical Narrative, two genealogy workshops, the launch of a dedicated webpage, and the construction of the New Hope trailhead along Welaunee Boulevard including the installation of an informational sign.

Ms. McKinney-Hollister discussed the Blueprint project's research findings, such as the community being founded by formerly enslaved individuals who later became sharecroppers and tenant farmers and noted the three community pillars: Testerina Baptist Church, Tuskeena Negro School, and the New Hope Cemetery. Ms. McKinney-Hollister also highlighted project milestones, including completion of the New Hope Community Historical Narrative, genealogy workshops, and the identification of six death records by the Florida Division of Historical Resources.

Ms. McKinney-Hollister noted that the next steps are to present the project to the IA Board and install and install the informational sign at the New Hope trailhead. CAC Member Mary Glowacki commented on the positive reception the project has received from the New Hope descendants, and CAC Member Leroy Peck recognized the amount of work completed. CAC Member Deborah Burr suggested adding New Hope signage along the Miccosukee Greenway.

CONSENT

1. ***Approval of the February 26, 2026 and May 21, 2026 Blueprint Intergovernmental Agency Citizens Advisory Committee Meeting Minutes***

CAC Member Rod McQueen moved to approve the Consent agenda. CAC Member William McCloud seconded the motion. Motion passed unanimously.

III. GENERAL BUSINESS

2. ***Election of CAC Chair and Vice Chair***

Blueprint Planning Manager Megan Doherty provided an overview of the election of the CAC Chair and Vice Chair.

CAC Member Rod McQueen nominated CAC Member Byron Greene to serve as CAC Chair. CAC Member William McCloud seconded the nomination.

CAC Member Leroy Peck moved to nominate William McCloud for the Vice Chair. CAC Member Deborah Burr gave the 1st motion in favor and CAC Member Peck seconded the motion.

Both motions passed unanimously.

IV. PUBLIC HEARING 5:00P.M.

3. **First Public Hearing on the Proposed Fiscal Year 2027 Operating Budget and Fiscal Year 2027-2031 Five-Year Capital Improvement Program (CIP) Budget for the Blueprint Intergovernmental Agency**

Blueprint Planning Manager Megan Doherty provided an overview of the proposed Fiscal Year 2027 Operating Budget and Fiscal Year 2027-2031 Capital Improvement Program. Ms. Doherty reviewed the FY 2027 budget development process and highlighted previous IA Board direction and project prioritization over the previous 11 years. Ms. Doherty noted that the budget supported 12 projects planned to be in construction in FY 2027. Ms. Doherty also highlighted recent project awards and grant funding received by Blueprint.

Office of Economic Vitality (OEV) Director Keith Bowers presented OEV's proposed FY 2027 budget and discussed economic performance and recent rankings related to economic growth in Tallahassee-Leon County. Mr. Bowers noted that approximately $4.61 million is allocated in FY 2027 for existing economic development projects, including affordable housing, airport improvements, air service incentives, and other OEV programs.

CAC Member Danielle Irwin asked how potential project cost increases are addressed within the budget. Ms. Doherty discussed the Bannerman Road project as an example, explaining how the project budget has been monitored and adjusted as the scope was expanded and design progressed and each year the budget reflects the updated cost estimates. Blueprint Director Autumn Calder added that the infrastructure budget is a snapshop in time and is balanced annually.

CAC Member Deborah Burr asked if the FY 2027 projects in construction presented in the table on page 23 were the only projects presented to the IA Board and if there were any new greenway projects. Ms. Doherty clarified that the table listed only projects in construction, and the FY 2027 budget provides funding for projects in various phases of implementation. Greenways projects are funded annually based on the IA Board's approved prioritization.

CAC Member Rod McQueen asked who establishes project funding priorities. Ms. Doherty responded that project funding priorities are established by the IA Board.

CAC Member Mary Glowacki asked how interest earnings are accounted for in the budget. Blueprint Financial Officer Tres Long explained that interest is earned on cash in the Agency's funds and is budgeted through the annual budget process.

Chair Chris Daniels asked whether homes had been renovated as part of the Floral Street project. Blueprint Design and Construction Manager Abe Prado confirmed that home improvements had been completed in coordination with the City of Tallahassee through the Bond Neighborhood Plan.

CAC Member Danielle Irwin noted that the City of Tallahassee and Leon County had recently completed vulnerability assessments and asked whether Blueprint incorporates findings from those assessments and flood mapping when implementing projects. Design and Construction Manager Abe Prado noted that Blueprint has a monthly coordination meeting with the City and County departments to discuss Blueprint projects and share information. Mr. Prado identified the Munson Slough Bridge Replacement project as an example of coordinated stormwater improvements.

CAC Member Irwin asked about the four percent salary increase for Blueprint employees. Ms. Doherty confirmed the four percent figure, and Ms. Calder noted that this is consistent with what the City and County have included in their budgets.

V. ***ADJOURN***

The meeting adjourned at 5:45 p.m.

NEXT CAC Meeting: October 29, 2026, at 4:30 p.m.

Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #1

September 24, 2026

Title:	Approval of the June 11, 2026, Blueprint Intergovernmental Agency Board of Directors Workshop and Meeting Minutes
Category:	Consent
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, PLACE Autumn Calder, Director, Blueprint Intergovernmental Agency Susan Dawson, Blueprint Attorney Keith Bowers, Director, Office of Economic Vitality

STATEMENT OF ISSUE:

This item presents the summary meeting minutes for the June 11, 2026, Blueprint Intergovernmental Agency Board of Directors (IA Board) budget workshop and meeting and requests the IA Board's review and approval of the minutes as presented.

FISCAL IMPACT

This item has no fiscal impact.

RECOMMENDED ACTION:

Option 1: Approve the June 11, 2026, Blueprint Intergovernmental Agency Board of Directors Workshop and Meeting Minutes.

OPTIONS:

Option 1: Approve the June 11, 2026, Blueprint Intergovernmental Agency Board of Directors Workshop and Meeting Minutes.

Option 2: IA Board Direction.

Attachments:

1. Draft Summary Minutes of the Blueprint Intergovernmental Agency Board of Directors June 11, 2026, Workshop.
2. Draft Summary Minutes of the Blueprint Intergovernmental Agency Board of Directors June 11, 2026, Meeting.

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Blueprint Intergovernmental Agency
Board of Directors
Budget Workshop Meeting Minutes

Date: September 24, 2026
To: Board of Directors
From: Artie White, PLACE Director
Subject: Summary Minutes to Budget Workshop of June 11, 2026

MEMBERS PRESENT

COUNTY	CITY
Commissioner Brian Welch	Commissioner Dianne Williams-Cox
Commissioner Nick Maddox	Mayor John Dailey
Commissioner David O'Keefe	Commissioner Jeremy Matlow
Commissioner Carolyn Cummings	Commissioner Jacqueline Porter (virtual)
Commissioner Rick Minor	Commissioner Curtis Richardson- Chair
Commissioner Bill Proctor	
Commissioner Christian Caban	

I. AGENDA MODIFICATIONS

Commissioner Richardson opened the meeting at 1:02pm.

Commissioner Caban moved to allow Commissioner Porter to participate telephonically. The motion was seconded by Commissioner Minor. The motion passed 8-0 (weighted 46-0). Mayor Dailey, Commissioners Maddox and Welch were absent at the time of the vote.

There were no agenda modifications.

II. WORKSHOP ITEMS

Workshop on the Proposed Fiscal Year 2027 Operating Budget and Five-Year Capital Improvement Program for the Blueprint Intergovernmental Agency

PLACE Director Artie White provided an introduction of the agenda item and stated that staff was presenting a balanced budget that continues the current momentum of the Blueprint Program. Director White explained the 2027 budget development process and stated that the FY 2027 budget was developed to ensure consistency with the City and County budget process and that the budget incorporates the past 10 years of IA Board direction. Director White also explained the next steps to accept the proposed budget required two public hearings which are scheduled for September 10th at the Blueprint Citizens Advisory Committee Meeting and September 24th at the next IA Board of Directors Meeting.

Blueprint Director Autumn Calder began her presentation by explaining that the 2027 proposed budget focused on implementation of the 2020 Blueprint projects. Director Calder stated that 28 Blueprint projects were in progress and the proposed budget supports continued project progress for 12 infrastructure projects in construction during FY 2027. The proposed 2027 budget allocates $31.4 million to infrastructure projects. Over the next five years, Blueprint anticipates spending approximately $78.5 million on infrastructure projects. The continued project development provides over 26 miles of roadway improvements, 122 miles of bicycle and pedestrian improvements, and over 540 acres of park space. Director Calder summarized the project prioritization and IA Board direction since 2015.

OEV Director Keith Bowers provided an overview of the proposed OEV budget for $4.6 million. The proposed budget allocates funding to the Future Opportunity Leveraging Fund (FOLF), business expansion commitments, personnel and operating expenses, and debt repayment expenses. Director Bowers explained that OEV proposed budget continues funding for the Air Service Incentive and Capacity Improvement Program and the Affordable Housing Gap Finance Program.

Director White summarized the budget presentation, the budget ratification process, and the budget recommendations. Director White closed by stating that staff recommendation was for Option 1: *Approve the proposed Infrastructure and Office of Economic Vitality (OEV) FY 2027 Operating Budgets and FY 2027-2031 Capital Improvement Program into the final FY 2027 budget plan*.

Commission Proctor moved to approve the proposed Infrastructure and Office of Economic Vitality (OEV) FY 2027 Operating Budgets and FY 2027-2031 Capital Improvement Program into the final FY 2027 budget plan. The motion was seconded by Commissioner Minor.

Commissioner Proctor asked about the impacts of Senate Bill 1134 on the proposed budget. Director White explained that Senate Bill 1134 impacts the MWSBE program, and that staff is in the process of reevaluating its policies to remain in compliance with State law. Commissioner Proctor then asked about the impacts of the proposed property tax reduction legislation and its impact on the Agency's budget. Director White explained that Blueprint program is funded by sales tax revenue and would not be impacted by the proposed property tax legislation.

Commissioner Maddox noticed the Board that he intended to discuss the Leon Entrepreneurship and Advisory Program (LEAP) and Jacksonville's Capital Access Program during the general meeting. He stated that he intends to propose that OEV work with these programs to further the small business enterprise program.

Commissioner O'Keefe asked questions about the estimated cost increases for the Gateway projects. Director Calder explained that the estimates are updated as projects progress through design to construction and that actual construction costs will be reflected in the budget once a project is bid, awarded for construction, and completed. Director Calder further explained that budget estimates are impacted by a variety of factors such as market changes, design and construction impacts, and cost saving opportunities. Commissioner O'Keefe further inquired as to why the cost estimates for some projects remained the same while others were adjusted. Director Calder explained that different factors impact the cost estimates such as information gained from PD&E studies, acquisition costs, and design costs.

Commissioner O'Keefe discussed the individual project budgets and expressed concern about the Tharpe Street project. Director Calder explained that all the projects are being implemented in the priority order given by the Board. She also explained that the cost estimates for the larger Gateway projects are being updated as those projects are currently being implemented. Director White explained that roadway projects have more cost variables unlike sidewalk and pedestrian improvements such as the Tharpe Street. Commissioner Proctor requested that the Board consider prioritizing progress on the Tharpe Steet project. Commissioner Proctor also requested that OEV work with the Tallahassee Chamber of Commerce to bring growth projects to Tallahassee.

Commissioner Matlow supported the requests made by Commissioners O'Keefe and Proctor and requested a status update on the Tharpe Street project. Director Calder explained that Blueprint would be advertising for design services for the Tharpe Street project and anticipates moving into design by fall of this year. Director Calder also explained that the Agency is seeking Federal grants to supplement the funding for the Tharpe Street project. Project Manager Martha Hodgson further explained that design takes approximately 18 to 24 months to complete and that the project includes stormwater improvements, utility relocation, right of way acquisition, and sidewalk construction. Mrs. Hodgson concluded by highlighting the priority segments of the project.

Commissioner Matlow inquired about the process to prioritize the completion of the Tharpe Street project. Director White explained that the Agency is aggressively seeking federal funding and other funding opportunities to complete the project quickly. Commissioner Matlow then inquired about the Orange Avenue project, Blueprint's role in the completion of the project, and the plan to complete the project by 2040. Director White explained that the funding for the Orange Avenue project is primarily the responsibility of the State of Florida, and that Blueprint is dependent on funding from the Florida Department Transportation to progress on that project.

Commissioner Minor spoke about Blueprint's leveraging efforts to increase the available funding for the multiple Blueprint projects. He discussed Blueprint's federal grant application for the North Monroe Gateway project. Commissioner Minor further discussed the project priorities and the expanding budgets for larger projects to ensure more Blueprint projects are implemented and completed.

Commissioner Caban asked about the project schedule for the Tharpe Street project and the available funding to complete the entire project. Director White explained that the project was not fully funded in the 5-year Capital Improvement Project (CIP) fund and Director Calder explained that the project is scheduled to move into design with the anticipation for construction to begin in 2028 or 2029. Commissioner Caban discussed the rising cost of larger roadway projects and the lack of funding for the other Blueprint projects such as Tharpe Street. Commissioner Caban stated that he could not support the proposed budget if it does not fully fund the Tharpe Street project.

Director White explained that the role of staff was to bring a balanced budget to the Board each year and to implement the projects as directed by the Board. Director White further explained that from the inception of the 2020 sales tax program it was explained that the project load outweighed the projected sales tax revenue. Director White continued to explain that staff has been working to secure funding and leverage the available funds to close the funding gap through grant applications, leveraging opportunities, and joint collaboration efforts.

Commissioner Proctor discussed the need for the Tharpe Street project to include roadway improvement to alleviate traffic congestion. Commissioner Proctor asked about the total cost of the Tharpe Street project versus the available funding currently allocated to the project. Commissioner Proctor suggested discussion of reprioritization of the Blueprint projects following the election results in November.

Commissioner Maddox discussed the prioritization of the Blueprint 2020 projects and explained to the Board that staff is implementing the projects in the order they were given by the IA Board. Commissioner Maddox then inquired about the substantial amendment process to reprioritize the Blueprint 2020 projects. Blueprint Attorney Susan Dawson explained that reprioritizing the Blueprint 2020 projects would require a substantial amendment as addressed in the Bylaws.

Commissioner Caban spoke about the previous amendment to the Tharpe Street project and stated that the project was moved up to 2028. Director Calder explained that the 2023 amendment to the Tharpe Street project addressed the reduction in scope with an anticipated timeline. Commissioner Proctor requested an explanation of the Tharpe Street project. Director White explained that the 2023 substantial amendment reduced the scope of the Tharpe Street project to allow it to be completed sooner. Director White further explained that while the amendment would allow for the project to be completed sooner, the amendment did not reprioritize the project over other projects.

Commissioner Cummings asked about the most recent bond issuance and the availability of funding to cover all the Blueprint projects. She explained that she had the understanding that the bond issuance would cover all the projects until the conclusion of the Blueprint 2020 program in 2039. Director White explained that each year the staff presents a balanced budget based on the projected revenue including any funding from the bond issuance but that the annual balanced budget does not fully fund all of the Blueprint projects. Director Calder explained the funding strategy for the Blueprint 2020 sales tax program, the dependance on collaboration with the State, funding for State roads like Orange Avenue, and the shortfall of local revenues for projects on State roads. Commissioner Cummings asked about the cost estimates for the projects currently in construction and whether there was enough funding available to cover the projects currently under construction. Director Calder explained that the projects would be implemented in the priority order as directed by the Board and that funding will be allocated to complete projects in their respective priority.

Commissioner Williams-Cox called for the question. The motion was seconded. The motion failed for lack of a 2/3's majority vote with Commissioners Matlow, Porter, Caban, Maddox, Proctor, and Welch voting in opposition.

Commissioner Williams-Cox spoke about the annual budget process and the priority to complete projects. Commissioner Caban clarified that in 2023 following the substantial amendment to the Tharpe Street project he received an email from staff stating that construction of the Tharpe street project was moved up from 2037 to 2030 and was fully funded as directed by the Board. Commissioner Welch spoke about reprioritizing projects that are still in their infancy rather than focusing on projects currently under design and construction. Commission Welch suggested rediscussing the Airport Gateway project.

Commissioner Richardson spoke about providing staff with direction on how to implement the Blueprint program and the need for a special meeting to discuss reprioritizing projects if the Board desired to do so.

The motion to approve the proposed budget passed 9-3 (weighted 53-17). Commissioners Caban, O'Keefe, and Porter voted in opposition of the motion.

III. <u>ADJOURN</u>

The meeting adjourned at 2:49 p.m.

The next Blueprint Intergovernmental Agency Board of Directors Meeting is scheduled for ***<u>June 11, 2026, at 3:00 p.m.</u>***

Blueprint Intergovernmental Agency
Board of Directors
Meeting Minutes

Date: **September 24, 2026**
To: Board of Directors
From: Artie White, PLACE Director
Subject: Minutes to Board of Directors' Meeting of June 11, 2026

MEMBERS PRESENT

COUNTY	CITY
Commissioner Brian Welch	Commissioner Dianne Williams-Cox
Commissioner Nick Maddox	Mayor John Dailey
Commissioner David O'Keefe	Commissioner Jeremy Matlow
Commissioner Carolyn Cummings	Commissioner Jacqueline Porter (virtual)
Commissioner Rick Minor	Commissioner Curtis Richardson- Chair
Commissioner Bill Proctor	
Commissioner Christian Caban	

Commissioner Richardson opened the meeting at 3.01pm.

I. AGENDA MODIFICATIONS

Commissioner Williams-Cox moved to allow Commissioner Porter to participate telephonically. The motion was seconded by Commissioner Minor. The motion passed unanimously.

There was an agenda modification. Item #3 on Consent was pulled by Commissioner O'Keefe.

II. CITIZENS TO BE HEARD

There were no speakers for non-agenda items.

III. INFORMATION ITEMS

- **Receipt and File**
  - Blueprint Infrastructure Community Engagement Update
  - Citizens Advisory Committee May 21, 2026, Draft Minutes

IV. CONSENT

Commissioner Williams-Cox moved to accept the Consent Agenda without Item #3. The motion was seconded by Commissioner Welch. The motion passed unanimously.

- **Agenda Item #1: Approval of the March 12, 2026, Blueprint Intergovernmental Agency Board of Directors Meeting Minutes.**
- **Agenda Item #2: Acceptance of the Fiscal Year 2025 Annual Comprehensive Financial Report for the Blueprint Intergovernmental Agency**
- **Agenda Item #4: Ratification of the June 11, 2026, Blueprint Intergovernmental Agency Budget Workshop**

V. GENERAL BUSINESS/PRESENTATIONS

(Pulled from Consent) Agenda Item#3: Status Report on Communication Policies and Business Support Practices During Construction of Infrastructure Projects

Serena Moyle, Volunteer President for the Market District Association, spoke about the business impacts to the Market District area caused by the roadway and placemaking construction. She requested that the Board consider a policy to compensate businesses impacted by local government construction projects.

Commissioner O'Keefe moved to accept Option 1: Accept the status report and bring back Agenda Item with Policy suggestions on using the OEV funds to help businesses impacted by future Blueprint Infrastructure projects. The motion was seconded by Commissioner Welch.

Commissioners O'Keefe and Welch spoke in favor of the motion. Commissioner Matlow spoke in opposition of the motion stating that the financial impact to the Agency would be astronomical but acknowledged that better coordination and signage for businesses near construction projects to mediate the disruption would be beneficial.

Commissioner Proctor spoke in opposition of the motion and inquired as to how businesses would be compensated for projects currently underway.

Blueprint Attorney Susan Dawson explained that there are statutory limitations on how Economic Development funds can be used and stated that this type of compensation program does not fit into the Economic Development program. Commissioner Proctor then asked about the business damages compensation under the Agency's Property Acquisition policy. Attorney Dawson explained that those funds come from Infrastructure dollars and the policy and statute allows for the valuation of business damages in the negotiation and acquisition of property under the Infrastructure program. She further explained the eminent domain process when negotiations with property owners are unsuccessful.

Commissioner Caban spoke in favor of the motion. Commissioner Cummings inquired about expanding the business damages policy to also address businesses impacted by natural disaster and referenced the funding provided to the Art District following the tornado impacts a few years ago. Attorney Dawson explained that the funds used to compensate the businesses in the Art District were federal dollars and reiterated the limited allowable uses of Economic Development funds under State statute.

Mayor Dailey spoke in favor of the motion and recommended that staff consider ways to work with local partners to create a program to assist impacted businesses. He recommended working with the Department of Commerce and the local chambers of commerce.

The motion passed 12-0 (weighted 70-0).

Agenda Item#5: Election of the Blueprint Intergovernmental Agency Board of Directors' Vice-Chairperson

Commissioner Williams-Cox moved to nominate Commissioner Minor as Vice Chair of the IA Board. The motion was seconded by Commissioner Welch. Commissioner Matlow made a substitution motion to nominate Commissioner Bill Proctor as Vice-Chair in accordance with the Bylaws. The substitute motion was seconded by Commissioner O'Keefe.

The substitute motion passed 8-4 (weighted 44-26). Mayor Dailey and Commissioners Richardson, Williams-Cox, and Minor voting in opposition. Commissioner Proctor was elected as the Vice-Chair.

Agenda Item#6: Consideration of Non-Competitive Economic Development Project Funding Request by Neighborhood Medical Center, Inc.

Commissioner Proctor moved to accept Option 1 and approved the Project Funding for the Non-Competitive Economic Development Project Funding Request by Neighborhood Medical Center, Inc. The motion was seconded Commissioner Williams-Cox. The motion passed unanimously.

Agenda Item#7: Approval of the Allocation of Economic Development Funds in Support of Project Prestige

Commissioner Minor moved to accept Option 1: Approve the Targeted Business Program funding for Project Prestige for a total estimated amount of $2,628,675 over ten years and authorize the Director of PLACE or his designee, to execute an agreement for the commitment of additional funds to Florida A&M University in the amount of $690,000 to be paid over the remaining thirteen (13) years of the Infrastructure Sales Surtax Program. The motion was seconded by Commissioner Williams-Cox. The motion passed unanimously12-0 (weighted 70-0).

Agenda Item#8: Review of the Consolidated MWSBE Policy
The following citizen spoke on the Agenda Item:

Mike Goldstien spoke about delaying action on this item until after the Governor's race.

Stanley Simms spoke in favor of maintaining the MWSBE program.

Commissioner Williams-Cox moved to accept Option 1: Accept the informational update and direct staff to bring back a Small Business Enterprise (SBE) Policy that complies with state law for IA Board consideration. The motion was seconded by Commissioner Welch.

Commissioner Williams-Cox spoke in favor of the MWSBE program but stated that the State legislature passed the law, and the Agency is now forced to amend its policy. She requested that citizens become more engaged at the State level. **Commissioner Proctor offered an amendment to the "to direct staff to return with a policy to compensate businesses impacted by the changes to the MWSBE Program." The amendment was accepted by Commissioner Williams-Cox**

Commissioner Cummings spoke in favor of the original motion stating that she believed women and minority owned businesses would qualify as SBEs under a new policy.

Commissioner Proctor spoke against the motion with the amendment stating that he would not support any motion abolishing the MWSBE Program.

Commissioner Williams-Cox then rescinded the amendment to the motion to allow Commissioner Proctor to make a separate motion. The original motion passed 10-2 (weighted 60-10) with Commissioners O'Keefe and Proctor voting in opposition.

Commissioner Proctor moved to direct OEV to bring back an Agenda Item analyzing the impact to MWSBEs resulting from the transition from an MWSBE program to an SBE program; and an analysis of creating a fund to compensate MBEs and WBEs for losses incurred by the transition from an MWSBE program to an SBE program. The motion was seconded by Commissioner Maddox.

Director White explained that providing compensation to businesses impacted by the transition from MBEs and WBEs to SBEs would inherently be based on race and gender and would likely be prohibited by SB1134 but that staff would provide this analysis as directed.

Commissioner Maddox spoke in favor of the motion recognizing the establishment of a compensation fund may be prohibited. He stated that he supports reviewing the analysis. Commissioner Matlow also spoke in favor of the motion.

Mayor Dailey spoke in opposition of the motion stating that the fund would be inconsistent with SB1134, outside the scope of Blueprint, and preempted by State law.

Commissioner Williams-Cox raised concerns about amount and source of funds necessary to compensate the impacted firms.

Commissioner Maddox requested an amendment to the motion to include directing OEV to work with partners such as FAMU, SBDC, and Career Source to assist MWSBEs build capacity while transitioning to the SBE program. The amendment was accepted by Commissioner Proctor.

Commissioner Williams-Cox requested clarity on whether Commissioner Proctor was seeking an analysis in the short term before the MWSBE transition to SBE or a longer-term study on the impacts following the transition from an MWSBE to an SBE program. Commissioner Proctored clarified his request that OEV create a framework for creating a fund to compensate MBEs and WBEs for impacts from the transition from a MWSBE program to an SBE program in the short term, but that the ability for MBEs and WBEs to receive funding would be based on longer-term analysis (2 or 3 years) of the impacts on MWBE certified firms.

Commissioner Minor noted that the Tallahassee Metro ranked 14 in the Nation for the percentage of Black-owned businesses and commended staff on their work with the MWSBE Program.

The amended motion passed 11-1 (weighted 63-7) with Mayor Dailey voting in opposition.

Agenda Item #9: Approval of Resolutions for Acquisition of Property by Eminent Domain for the Airport Gateway Project

Commissioner Maddox to approve option 1: Approve Resolutions Nos. 2026-18 and 2026-19. The motion was seconded by Commissioner Welch.

Commissioner Caban asked whether this portion covered the Springhill Road portion of the Airport Gateway Project. Director White stated that it did.

The motion passed unanimously12-0 (weighted 70-0).

Agenda Item #10: Approval of Resolutions for Acquisition of Property by Eminent Domain for the Northeast Connector Corridor (Bannerman Road) Project

Commissioner Welch moved to accept option 1: Approve Resolutions Nos. 2026-20 and 2026-21. The motion was seconded by Mayor Dailey.

Commissioner Proctor asked about the access point of the churches located on Bannerman Road that would be impacted by the construction of this project. Director Calder explained that the Agency was able to negotiate an acquisition agreement with both churches and that access will be maintained. Commissioner Proctor expressed concern about accessing the churches along Bannerman Road.

Commissioner Matlow asked questions related to acquisitions for stormwater facilities the communications with property owners. Director Calder and Project Manager Megan Doherty explained that there has been extensive outreach to property owners along Bannerman road for the acquisition of parcels for the roadway project and the necessary stormwater facilities. Commissioner Matlow spoke in opposition of the motion.

The motion passed 11-1 (weighted 63-7) with Commissioner Matlow voting in opposition.

VI. <u>DIRECTOR DISCUSSION ITEMS</u>

The following citizens were heard:

Gloria Anderson spoke about the New Hope Cemetery and submitted a formal demand for historical accountability, genealogical research support and preservation resources from Blueprint while it continues development and implementation of the Welaunee Road Project.

Commissioner Minor moved to direct OEV staff to evaluate the EDA's AI Upskill Accelerator Pilot Grant Program and serve as the lead applicant with after identifying how to meet the 40% match requirement. The motion was seconded by Commissioner Cummings.

Commissioner Minor discussed about the impact of AI on the white-collar workforce and explained that this grant would providing funding to provide job training on how to use AI. Commissioner Minor explained the 40% match requirement and the in-kind contributions. Commissioner Williams-Cox spoke about the $500,000 match requirement and asked whether OEV had the funds for this grant application. Director Bowers explained that this type of expenditure did align with the economic development program and that OEV would need to evaluate its budget and seek opportunities for in-kind contributions to meet the match requirement. Commissioner Williams-Cox discussed the short timeline and suggested that other local partners such as chambers of commerce may be better positioned to apply for the grant.

Commissioner O'Keefe spoke in opposition to the motion due to the $500,000 match requirement and short submission deadline. Commissioner Cummings expressed concern about the $500,000 match requirement and the impact to the OEV budget.

Commissioner clarified that multiple local partners are working with OEV to complete the EDA application and the OEV would be the lead applicant. He stated that the application would be completed with the assistance of TSC and the Apalachee Regional Planning Council. Commissioner Minor also clarified that the match requirement could come from in-kind or monetary contributions from outside partners.

Commissioner Caban identified his potential conflict of interest as a member of the Tallahassee State College (TSC) Board.

Commissioner Maddox discussed the Board's hesitancy to authorize OEV to serve as the lead applicant with the short deadline and the match requirement without being able to review the application submission prior the next IA Board meeting scheduled for September.

Commissioner Minor amended the motion to direct OEV staff to apply for the U.S. Economic Development Administration's AI Upskill Accelerator Pilot grant program by the grant deadline is July 10th and authorize OEV to look at partnering for in-kind contribution (non-monetary) with Tallahassee State College and others. The amended motion was seconded by Commissioner Cummings.

The motion passed 7-2 (weighted 41-12) with Commissioners Williams-Cox, and O'Keefe voting in opposition. Commissioner Proctor and Mayor Dailey were out of chambers at the time of the vote. Commissioner Caban abstained from voting due to board membership with TSC (see Form 8B, attachment 1).

Commissioner Matlow moved to direct staff to bring back an agenda item regarding the status of the Tharpe Street Project and address issue of reprioritization of the Project for Board's consideration. The motion was seconded by Commissioner Caban.

The motion passed 10-0 (weighted 58-0). Commissioner Proctor and Mayor Dailey were out of chambers at the time of the vote.

Commissioner Matlow moved to direct staff to bring back an agenda item analyzing how AI Data Centers align with OEV's Target Industry of Applied Sciences and Innovation and Professional Service. The motion was seconded by Commissioner Caban.

Commissioner Matlow explained that he does not believe OEV should provide any type of incentive to AI Data Centers seeking to be in Tallahassee-Leon County.

Commissioner Williams-Cox spoke in opposition to the motion stating that the Comp Plan already prohibits the construction of an AI Data Center in Tallahassee-Leon County so there is no need to create a policy prohibiting incentive funding to recruit an AI Data Center to the area. Commissioner Matlow explained that the motion was intended to formalize Blueprint's policy related AI Data Centers. Commissioner Maddox recommended amending the motion to prohibit the use of incentive funds for AI Data Centers. **Commissioner Matlow amended the motion to direct staff to bring back policy options to prohibit Blueprint funding or allowing incentives for Data Centers using OEV funds. The amended motion was seconded by Commissioner Caban.**

Commissioner Williams-Cox requested that City and County staff explain the Comp Plan and how it impacts the AI Data Centers in Tallahassee-Leon County. Assistant City Manager Wayne Tedder and Director of City and County Planning Michael Alfano explained that the Comp Plan does not allow for the construction of an AI Data Center and that an amendment to the Comp Plan would be necessary before a AI Data Center could be constructed in the incorporated or unincorporated Leon County area.

Commissioner Williams-Cox reiterated that she did not see the purpose of the motion since that current Comp Plan does not allow for the construction of AI Data Centers. Commissioner Matlow explained that the policy request is preemptive in the event the Comp Plan is amended to allow for AI Data Centers. Commissioner Maddox clarified that he was requesting for staff to bring back a policy that prohibits the funding of AI Data Centers to mimic the policies under consideration by the County and the City.

The motion passed 8-2 (weighted 44-14) with Commissioners Williams-Cox and Richardson voting in opposition. Commissioner Proctor and Mayor Dailey were out of chambers at the time of the vote.

Commissioner Maddox raised a concern from Commissioner Proctor about access to the Southside Cemetery. Director White explained that the construction in the area is being managed by the Florida Department of Transportation and that a protected median is being constructed which has necessitated traveling to Lake Bradford Road to access the cemetery.

Commissioner Maddox moved to direct OEV staff to evaluate funding the Leon Entrepreneurship and Advisory Program (LEAP) in its 2028 budget and evaluate Jacksonville's Capital Access Program to expand OEV's SBE program. The motion was seconded by Commissioner O'Keefe. The motion passed unanimously.

Commissioner Maddox moved to direct OEV staff to bring back an Agenda Item analyzing how the local workforce may be impacted by technology, including AI, in the next five years. The motion was seconded by Commissioner Caban.

Commissioners Minor and Williams-Cox spoke in favor of the motion. **The motion passed unanimously.**

Commissioner Cummings requested that staff to return with a report about the New Hope Cemetery following completion of the historical survey. Director Calder explained that Blueprint has done extensive historical survey and preservation work for the New Hope Cemetery and throughout the Miccosukee Greenway project and would provide the report upon its completion.

Commissioner O'Keefe inquired as to OEV's involvement in promoting and connecting people to skilled trades. Director Bowers explained the MWSBE program and OEV's involvement in workforce development and connecting businesses with the labor force.

VII. **<u>ADJOURN</u>**
The meeting adjourned at 4:35pm

The next Blueprint Intergovernmental Agency Board of Directors' Meeting is scheduled for ***<u>September 24, 2026, at 3:00p.m.</u>***

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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #2

September 24, 2026

Title:	Approval of the 2027 Blueprint Intergovernmental Agency Meeting Schedule
Category:	Consent
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, Department of PLACE Autumn Calder, Director, Blueprint Keith Bowers, Director, Office of Economic Vitality

STATEMENT OF ISSUE:

This item seeks Blueprint Intergovernmental Agency Board of Directors (IA Board) approval of the proposed 2027 Blueprint Intergovernmental Agency Meeting Schedule. The proposed 2027 Meeting Schedule provides for four IA Board meetings, a budget workshop, and a budget public hearing.

FISCAL IMPACT

This item has no fiscal impact.

RECOMMENDED ACTION:

Option 1: Approve the proposed 2027 Blueprint Intergovernmental Meeting Schedule.

SUPPLEMENTAL INFORMATION:

The Blueprint Meeting Schedule and Agenda Policy provides that the Director of PLACE, Blueprint Director, and OEV Director will prepare a draft Meeting Schedule. The proposed schedule, reviewed by the County Administrator and City Manager, specifies dates, times, and locations for IA Board meetings for a period of at least one year.

The IA By-Laws provide that the IA Board must meet at least once annually to consider an annual work plan and the past year's performance report. The proposed 2027 meeting schedule provides for four meetings, a budget workshop, and a budget public hearing for Blueprint Infrastructure and OEV. The proposed 2027 schedule maintains the four-meeting structure the IA Board adopted in September 2023 and has approved each year since.

The proposed 2027 meeting schedule is outlined below. Within that schedule, the proposed June 10, 2027, meeting carries an additional purpose. It falls in advance of the June 30 deadline for filing the Annual Comprehensive Financial Report, the Agency's audited yearly financial statements, with the State of Florida Auditor General, so that the IA Board can review and approve that report, together with the external auditor's opinion letter and the report on the Agency's internal controls, before it is filed.

Blueprint Intergovernmental Agency Board

(*Tallahassee City Commission Chambers, Meeting Times Noted Below)*

- Thursday, March 11, 2027
  - Regular Meeting, 3:00 PM
- Thursday, June 10, 2027
  - Budget Workshop, 1:00 PM; Regular Meeting, 3:00 PM
- Thursday, September 23, 2027
  - Regular Meeting, 3:00 PM; Budget Public Hearing 5:00 PM
- Thursday, November 4, 2027
  - Regular Meeting, 3:00 PM

If an additional meeting is warranted, the chairperson may call a special meeting in accordance with the Agency By-Laws. The proposed schedule holds the meeting frequency the IA Board approved for 2026, provides for the budget workshop and budget public hearing, which the annual budget process requires, and places the IA Board's review of the Annual Comprehensive Financial Report ahead of its June 30 filing deadline.

OPTIONS:

Option 1: Approve the proposed 2027 Blueprint Intergovernmental Agency Meeting Schedule.

Option 2: IA Board Direction.

RECOMMENDED ACTION:

Option 1: Approve the proposed 2027 Blueprint Intergovernmental Agency Meeting Schedule.

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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #3

September 24, 2026

Title:	Acceptance of the New Hope Community Historical Survey
Category:	Consent
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, PLACE Autumn Calder, Director, Blueprint Megan Doherty, Blueprint Planning Manager, Blueprint Michaela McKinney-Hollister, Planner II, Blueprint

STATEMENT OF ISSUE:

As requested by the Intergovernmental Agency Board of Directors (IA Board) at the June 11, 2026, meeting, staff is submitting the completed deliverables and findings for the New Hope Community Historical Survey project. This item provides an overview of Blueprint's collaboration with the New Hope Descendants across four core project components: the New Hope Community Historical Narrative (Attachment #1), two genealogy workshops, the launch of a dedicated Blueprint webpage, and the construction of the New Hope Trailhead including the installation of an informational sign.

Because of this project, the New Hope Community now has a written, publicly available history, researched and produced together with the Descendants of that community. New Hope was a community of formerly enslaved people, sharecroppers, and tenant farmers that formed around Testerina Primitive Baptist Church, the Tuskeena Negro School, and the New Hope Cemetery in eastern Leon County. The New Hope Community Historical Narrative establishes where the community stood, which no government record had previously defined, because New Hope was not an incorporated town; it documents the community's church, school, cemetery, many of the families, landmarks, and the events that shaped it; and it draws on archival research, property and school records, newspaper accounts, and interviews with the Descendants themselves. The two genealogy workshops equipped Descendants to trace their own family lines, and the Historical Narrative is written to receive what they find. The Blueprint webpage places the research and findings before the public, and the trailhead sign will present the community's history at the place where the community stood. Accordingly, Blueprint requests acceptance of the final project.

FISCAL IMPACT

This item has no fiscal impact.

RECOMMENDED ACTION:

Option 1: Accept the New Hope Community Historical Survey.

SUPPLEMENTAL INFORMATION:

As requested by the Blueprint Intergovernmental Agency Board of Directors (IA Board) at the June 11, 2026, meeting, staff is presenting the completed deliverables and findings for the New Hope Community Historical Survey project and seeks acceptance of the project.

Blueprint developed the New Hope Community Historical Survey project in collaboration with the New Hope Descendants. The project comprises four components: the New Hope Community Historical Narrative (Historical Narrative) (Attachment #1), two genealogy workshops, a dedicated project webpage, and the construction of the New Hope Trailhead along Welaunee Boulevard including interpretive signage, which will be installed later this fall. The New Hope Cemetery was identified as a historical and cultural resource during the Project Development and Environment (PD&E) Study for the Northeast Gateway: Welaunee Boulevard project. The New Hope Community Historical Survey project was funded through the Northeast Gateway project.

As directed by the IA Board at the December 8, 2022, meeting (Attachment #2), Blueprint procured consulting services to conduct the Historical Narrative and the genealogy workshops. The Historical Narrative documents the deep historical, cultural, and social roots of the New Hope area in eastern Leon County, centering on the African American community that developed around Testerina Primitive Baptist Church, Tuskeena Negro School, and the New Hope/Testerina Cemetery. New Hope was not an incorporated town, meaning it did not have its own city government, and it was not identified by the United States Census Bureau as a Census Designated Place, which is the label the Census Bureau assigns to a settled, named community that has recognized boundaries without having a city government of its own. The absence of those two formal designations did not mean the absence of a community. New Hope functioned as a cohesive community in every practical sense, held together by shared labor, worship, education, and family ties carried across generations. The Historical Narrative draws on archival research, interviews with residents and Descendants, church records, newspaper accounts, and genealogical research tracing family lines, all conducted in collaboration with Descendants of the New Hope community. Because that collaboration is ongoing, the Historical Narrative is written as a living document, meaning it is intended to grow over time rather than close with this submittal. Should Descendants or other members of the public bring forward additional information, it can be added to the Historical Narrative in the form of the appendices.

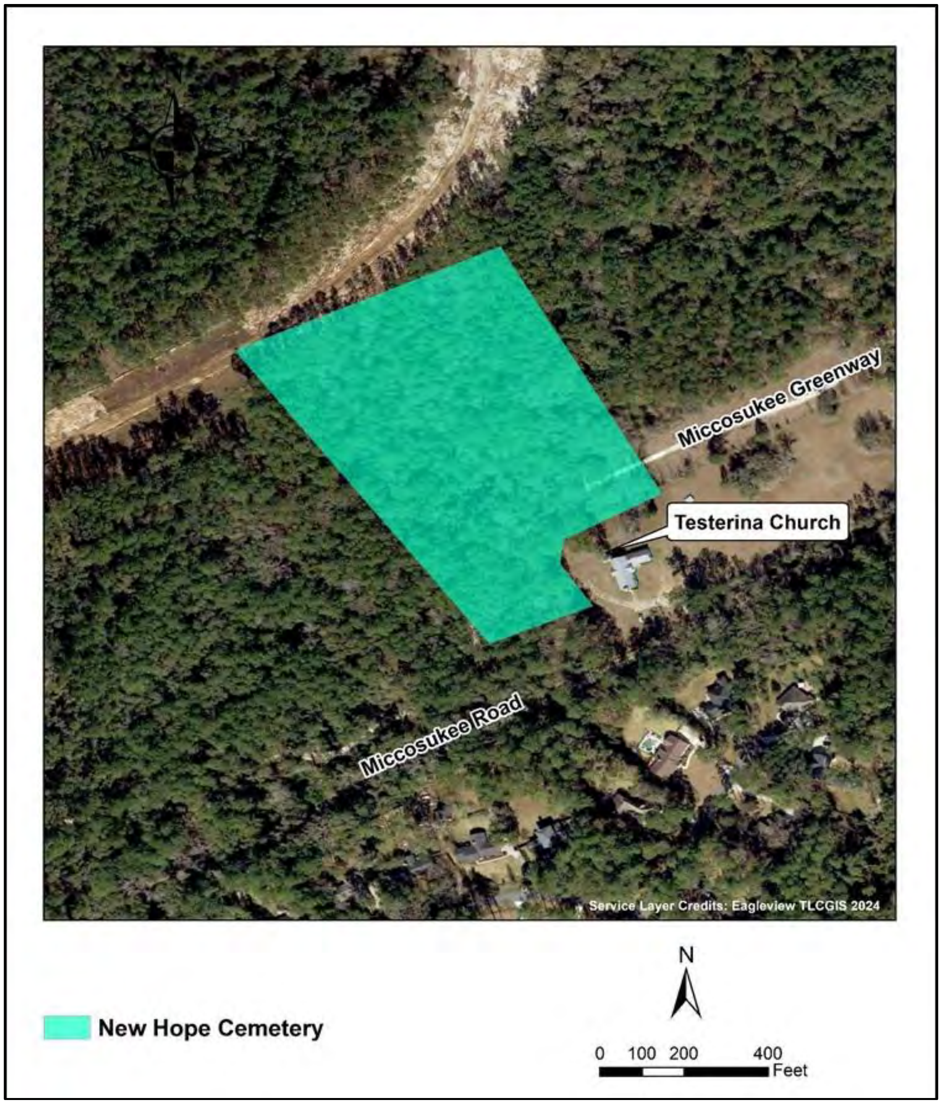
The genealogy workshops were held in August and September 2025. The New Hope webpage (Attachment #3) shares the research and Historic Narrative with the broader community. The New Hope Trailhead, constructed with the Northeast Gateway: Welaunee Boulevard project, provides access from Welaunee Boulevard to the New Hope Cemetery and the Miccosukee Greenway Trail. The project's concluding step, an informational sign at the Trailhead, is scheduled for installation this fall.

PROJECT BACKGROUND

For all Blueprint infrastructure projects, major archaeological, natural, cultural, and historic resources are identified through required regulatory processes. This ensures that these resources are identified early in project development. These regulatory processes focus on avoidance or mitigation for areas that may be impacted by construction. As project-by-project opportunities arise to integrate historic and cultural resources into projects beyond those required through regulatory processes, Blueprint seeks IA Board direction.

In 2019, the New Hope Cemetery was identified as a historical and cultural resource through the Project Development and Environment Study (PD&E) process for the Northeast Gateway: Welaunee Boulevard project, specifically through the Cultural Resource Assessment Survey (CRAS). A CRAS is the process of identification, documentation, and evaluation of archaeological, historical, architectural, and traditional cultural properties. The CRAS identified the New Hope Cemetery as a historic and cultural resource in the project area near the future roadway adjacent to Testerina Primitive Baptist Church. To further determine the boundaries of the Cemetery the Bureau of Archaeological Research (BAR) of the Florida Department of State's Division of Historical Resources (DHR) conducted cadaver dog surveys in the area northwest of Testerina Primitive Baptist Church in 2020 and 2021. These surveys resulted in an expansion of the Cemetery boundary, which is now estimated to extend from Testerina Primitive Baptist Church northwest into portions of the Miccosukee Canopy Road Greenway and adjacent property owned by the City of Tallahassee, as seen in Figure 1.

Figure 1. Location of New Hope Cemetery



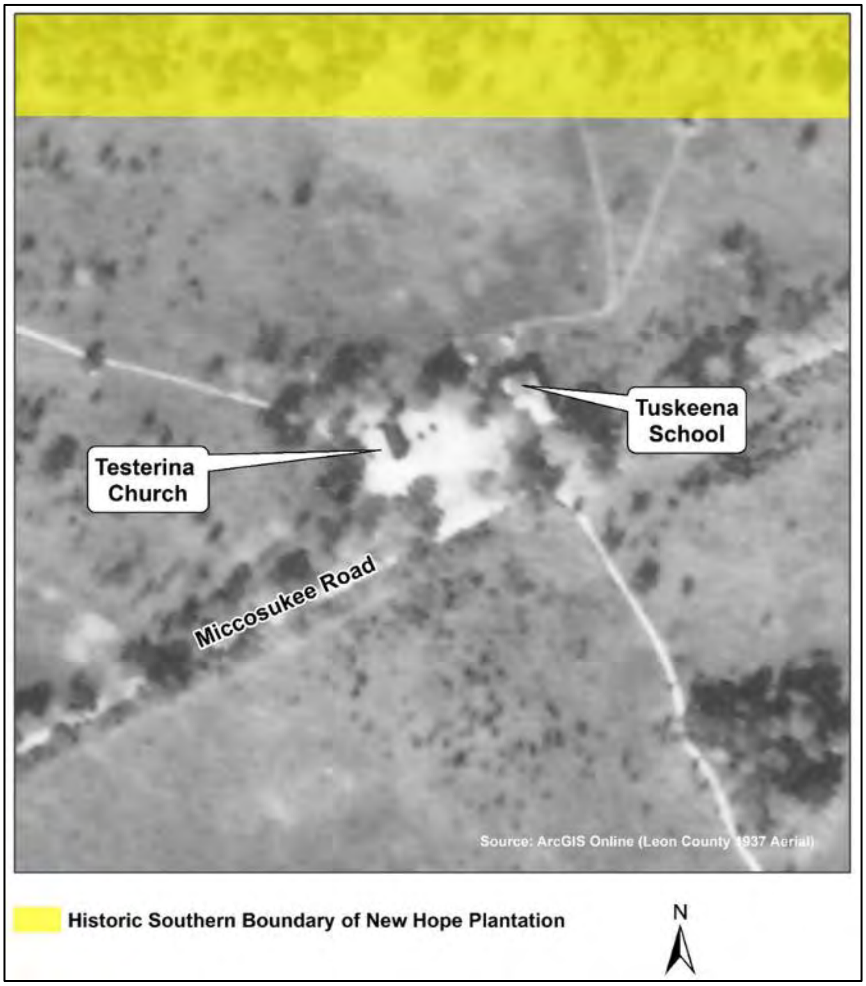
The PD&E study included an expanded survey area for fieldwork related to the New Hope Cemetery to ensure that the roadway would not impact the burial area. In consultation with DHR in 2021, close interval shovel tests were performed within the revised project right-of-way to provide a level of confidence that the project would not impact the New Hope Cemetery. The PD&E study was approved by the IA Board at the June 15, 2021, meeting. On January 6, 2023, the State Historic Preservation Officer (SHPO) determined during the permitting process that the Northeast Gateway project would have no effect on the resource. Out of an abundance of caution, Blueprint conducted archaeological monitoring during construction of Welaunee Boulevard. Archaeological monitoring of all ground-disturbing activities within the cemetery area was completed in April 2024. The monitoring was performed by qualified professionals in accordance with federal and state standards. Neither archaeological materials nor the presence of human remains or burials were identified during monitoring.

NEW HOPE COMMUNITY HISTORICAL SURVEY PROJECT OVERVIEW

On September 29, 2022, the IA Board provided direction to bring back an agenda item exploring a historical survey to document the history of the New Hope Community. At the December 8, 2022, meeting, the IA Board directed Blueprint to procure consulting services to conduct the survey. Blueprint, working with consultant Oneida LG2 Environmental Solutions, Inc., completed the survey through engagement with historians, interviews with community Descendants, and records research to identify, document, and archive the community's historical context and stories. The survey scope, established by the IA Board's December 8, 2022 (Attachment #2), direction, included:

Identifying the geographic location of the New Hope Community: The center point of the New Hope Community was determined to be in the general area of the Testerina Primitive Baptist Church and the Tuskeena Negro School, south of the New Hope Plantation boundaries, as shown in Figure 2. This location was established through BAR surveys documenting the cemetery and site visits recording the broader community area. The project team also produced survey maps documenting the boundaries of the New Hope Cemetery and the New Hope Plantation.

Figure 2. Location of the New Hope Community



Consolidating, analyzing, and contextualizing existing archival and historical materials related to the area: The project team conducted research by visiting local archives and libraries, including the State Archives of Florida, Tallahassee State College (TSC), Florida Agricultural and Mechanical University (FAMU), and Florida State University (FSU). Additional research was conducted online at national archive websites and databases. The project team also met with the New Hope Descendants. Research findings included Leon County School Board meeting minutes, historical photographs, historical documents, and property deeds. The research findings were organized within the New Hope Community Historical Narrative, Attachment #1.

Documenting families, landmarks, and significant historical events within the community through archival research or interviews: The project team documented historic landmarks, important events, and families connected to the New Hope Community through archival research, site visits to the project area, and interviews with the New Hope Descendants. In addition to research conducted by the project team, two genealogical workshops were held for the New Hope Descendants and community members with ties to the New Hope Community. The workshops were held in August and September 2025 and facilitated by the Tallahassee African American Genealogical Society (TAAGS). The workshops taught attendees how to conduct their family's genealogical research. As family members conduct genealogical research, the New Hope Community Historical Narrative can be supplemented.

Developing a written history that highlights the historical landscape and cultural contributions of the community: The New Hope Community Historical Narrative, included as Attachment #1, consists of three sections. The first section provides historical context of Northwest Florida. The second section explores the development of the New Hope Community. The final section covers the New Hope Community's history. The Historical Narrative is designed to be a living document, and if new information is brought forward by the New Hope Descendants or others it will be added to the Historical Narrative in the form of the appendices.

Blueprint and Oneida conducted extensive research to identify historical references to the "New Hope Community" in Leon County. The narrative includes historical photos, newspaper articles, and survey maps. Six death records were uncovered by the State Department of Historical Resources (DHR) during the research phase, which identified individuals buried at a "New Hope" cemetery. Because several cemeteries in the region share the "New Hope" name, these records cannot be tied conclusively to the New Hope Cemetery behind Testerina Primitive Baptist Church. However, given the strong likelihood these individuals may be interred at the New Hope Cemetery that is the focus of this project, these death records were included as an appendix to the Historical Narrative.

Collaboration with the New Hope Descendants

Engagement with the New Hope Descendants was a critical component of the New Hope Community Historical Survey. Blueprint met with the New Hope Descendants at the beginning of the project to understand the extent of the group's previous research and goals for researching the New Hope Community. The project team met with the New

Hope Descendants on multiple occasions at their bimonthly meetings; these discussions involved sharing of their experiences and questions pertaining to the character of the community as well as any significant landmarks and events. Descendants were also asked to review and verify some information identified through research efforts, helping to confirm historical details. These discussions provided a well-rounded understanding of the New Hope Community and added depth to the historical documents and materials uncovered throughout the project. The two genealogy workshops also provided an opportunity for Descendants and community members to participate in the research process by exploring their family histories.

As noted above, the Historical Narrative is designed to be a living document, and if new information is brought forward by the New Hope Descendants or others it will be added to the Historical Narrative in the form of the appendices. Blueprint and Oneida's research efforts were thorough to ensure that every reasonable avenue was explored to find any historical reference to a "New Hope Community" in Leon County. Further research into the burials at New Hope Cemetery will need to be undertaken by the Descendants. Florida law restricts access to death records less than 50 years old that contain the cause of death and full social security number to the descendant's spouse or parents; adult children, grandchildren, or siblings; person with a documented estate interest, or person working on behalf of the family members with affidavit proving their representation. Anyone of legal age can request death records that omit cause of death and redact the first five social security numbers. To request those records from the Florida Department of Health, applicants need to provide the deceased's name, date or year of death, and location. Accordingly, Descendants or other family members, who may also have access to family records and historical information not available to staff, such as family Bibles, birth certificates, photographs, and oral histories are best positioned to conduct this research, leveraging the research skills and resources taught at the two genealogy workshops.

Summary of New Hope Community Historical Survey Findings

The New Hope Community Historical Survey identified key findings regarding the development, cultural, and historical significance of the New Hope Community, a place created by formerly enslaved people who became sharecroppers and tenant farmers. Some community members were freed African Americans who may have previously worked on New Hope Plantation. "New Hope" likely got its name from the New Hope Plantation, which was a large parcel of land located immediately north of where the Testerina Primitive Baptist Church stands today. The New Hope Plantation eventually became part of the Welaunee Plantation.

Research determined that the New Hope Community was not considered a legally incorporated town or a Census Designated Place (CDP). A CDP is defined as statistical equivalents of incorporated places and represent unincorporated communities that do not have a legally defined boundary or an active, functioning governmental structure. Despite lacking this formal designation, New Hope functioned as a cohesive community defined by shared labor, worship, education, and kinship ties. Testerina Primitive Baptist Church was both the geographical and spiritual center of the historic New Hope Community. Tuskeena Negro School served the children of New Hope and those in neighboring communities. However, the school closed in 1951 as part of a broader educational consolidation movement in Leon County. Students from Tuskeena were transported to Barrow Hill School four miles away.

The New Hope Plantation underwent many changes in ownership and land use throughout the 19th and 20th century. Beginning as a traditional plantation that produced cotton in the 19th century, transforming into a dairy farm around 1918, and concluding as a quail hunting plantation in the late 1920's. The transition from cotton production to quail hunting resulted in a major decline in agricultural work and tenant farming. It is likely that members of the New Hope Community relocated to find better paying jobs.

NEXT STEPS

An informational webpage about the New Hope Community has been developed on the Blueprint website. This webpage features the Historic Narrative, provides a historical overview of the New Hope Community and summarizes research findings. All project deliverables are accessible through this website along with best practices for conducting personal research.

Blueprint will be installing an informational sign at the New Hope Trailhead along Welaunee Boulevard adjacent to the New Hope Cemetery and is working with the New Hope Descendants to seek their input on the sign content and design. This sign will inform trail users about the New Hope Community through interpretive text and historical photographs. The sign will be installed before the end of 2026.

CONCLUSION

As requested by the IA Board at the June 11, 2026, meeting, staff is submitting the completed deliverables and findings for the New Hope Community Historical Survey project. This item provides an overview of Blueprint's collaboration with the New Hope Descendants across four core project components: the New Hope Community Historical Narrative (Attachment 1), two genealogy workshops, the launch of a dedicated Blueprint webpage, and the installation of an informational sign at the Welaunee Boulevard trailhead, which will be installed later this fall. Accordingly, staff requests IA Board acceptance of the final project.

OPTIONS:

Option 1: Accept the New Hope Community Historical Survey.

Option 2: Do not accept the New Hope Community Historical Survey.

Option 3: IA Board Direction.

RECOMMENDED ACTION:

Option 1: Accept the New Hope Community Historical Survey.

Attachments:

1. New Hope Community Historical Narrative
2. December 8, 2022, IA Board Agenda Item: Authorization to Procure a New Hope Community Historical Survey (https://go.boarddocs.com/fla/talgov/Board.nsf/goto?open&id=CLPPW264FD51)
3. Blueprint "New Hope Community" webpage (https://blueprintia.org/public-art/art-projects/new-hope/)

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NEW HOPE COMMUNITY HISTORICAL NARRATIVE

Tallahassee, Leon County, Florida

Prepared for

BLUEPRINT INTERGOVERNMENTAL AGENCY

Prepared by

ONEIDA LG2 Environmental Solutions

Special thanks to the New Hope descendants for their contributions to the Historical Narrative.

September 15, 2026

Prepared for

Blueprint Intergovernmental Agency
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Image Credits: (Right) Worker on Welaunee Plantation, 1924: State Archives of Florida, Florida Memory | (Left) Luvenia and Ed Austin, sharecroppers on Welaunee Plantation, 1940: State Archives of Florida, Florida Memory

Executive Summary

This report is a historical survey and narrative that examines the origins and context of the New Hope Community in Tallahassee, Florida. At the direction of the Blueprint Intergovernmental Agency Board (IA Board) in December 2022, Blueprint was charged to provide a comprehensive community study that included: identifying the geographic location of the New Hope Community, consolidating, analyzing, and contextualizing existing archival and historical materials related to the area, documenting families, landmarks, and significant historical events within the community through archival research or oral history, and developing a written history that highlights the historical landscape and cultural contributions of the community.

Organized into three major sections, this report begins with an overview of the cultural and historical context of Northwest Florida, tracing the region's development from its prehistory through the Civil War and Reconstruction eras. The second section addresses the development of the New Hope Community within the framework of the African American Churches in Leon County, the New Hope Plantation, and the Welaunee Hunting Plantation. Particular attention is given to New Hope Plantation, its transformation from an antebellum cotton plantation to tenant farming, then briefly to dairy operations, and finally its absorption into the Welaunee Hunting Plantation in 1929. The final section focuses on the New Hope Community's recent past and status, providing historical context regarding the Testerina Primitive Baptist Church, Tuskeena School, and the New Hope Cemetery.

Originally a community of formerly enslaved people – sharecroppers and tenant farmers – "New Hope" likely got its name from the New Hope Plantation, which was a large parcel of land located immediately north of where the Testerina Primitive Baptist Church stands today. Research shows that the New Hope Community was not considered a legally incorporated town or a Census Designated Place (CDP). A CDP is defined as statistical equivalents of incorporated places and represent unincorporated communities that do not have a legally defined boundary or an active, functioning governmental structure. Figure 1 on page 4 shows the location of the Testerina Church and New Hope/Testerina Cemetery reflecting the general location of the New Hope Community.

Despite lacking this formal designation, the New Hope Community held a social and cultural significance to the Tallahassee area. New Hope functioned as a cohesive community defined by shared labor, worship, education, and kinship ties. Testerina Church is both the geographical and spiritual center of what is known as the New Hope Community, a place where people gathered, worshiped, and communed with one another. Tuskeena School, closed in 1951, served the children of New Hope and those in neighboring communities, providing an education for the underserved. Some community members were freed African Americans who may have previously worked on New Hope Plantation. Others were the descendants of enslaved people who may have worked at Welaunee Plantation. Within the New Hope Community, it is likely there were members of other nearby churches on Miccosukee Road, such as Mount Olive Missionary Baptist Church or New Zion Primitive Baptist Church.

To compile this report, research efforts were thorough to ensure that every reasonable avenue was explored to find any historical references to a "New Hope Community" in Leon County. Researchers met with New Hope residents and descendants, and these discussions involved sharing of oral histories and questions pertaining to the character of the community as well as any significant landmarks and events. These discussions provided a well-rounded understanding of the New Hope Community and added depth to the historical documents and materials uncovered throughout the project. Two genealogy workshops were held in 2025 to assist community members to undertake personal research to trace their lineage and identify family members who may be buried in the New Hope Cemetery. The workshops were led by Juanita Gaston of the Tallahassee African American Genealogical Society (TAAGS) and attendees learned how to use primary and secondary sources to trace their lineage.

Additional research was conducted onsite at archival institutions, including the State Archives of Florida, John G. Riley Center and Museum, African American Collection at Florida A&M, Meek-Eaton Black Archives Research Center and Museum, and Special Collections and Archives Division of the Florida State University Libraries. This phase of research included locating documents, maps, and photos. Extensive online research, including census data analysis, review of local newspapers, and examination of government documents, such as deeds and bill of sale, further supplemented these efforts. Online archival libraries were heavily utilized, including Florida Memory, US National Archives and Records Administration, and the John G Riley Digital Archives. Exhaustive efforts were made to uncover any information pertaining to the New Hope Community.

As documented in this report, the history of the New Hope Community represents historic- and post-reconstruction-era African American communities. Findings from the report illustrate an important chapter in Leon County's African American history, highlighting their resilience and impact that spans generations. The descendants of New Hope carry the legacy of those who have passed on, and prior to the start of this historical survey, descendants of the New Hope Community were actively collecting information and oral histories. This survey acknowledges and incorporates the work of the New Hope descendants and their dedicated effort to document and memorialize the New Hope Community. As such, this report is designed to be a living document, and as additional information is uncovered, it will be added to the report in the form of appendices. For example, death records were uncovered after the completion of the body of this Report which may be associated with the New Hope/Testerina Cemetery. An examination of these recently uncovered death records is presented as the first of these additional appendices (Appendix B).

Figure 1. Aerial view of general project location.
Source: Esri, Maxar, Earthstar Geographics, and the GIS User Community, 2024 aerial

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Cultural and Historical Context

Cultural Prehistory of Northwest Florida

Understanding the rich prehistory of Northwest Florida requires a careful synthesis of archaeological data spanning millennia. Scholars such as Milanich and Fairbanks (1980), Bense (1994), Tesar (1980), and others have developed comprehensive frameworks that articulate the cultural development of the region from the first Paleoindian arrivals through the early historic periods. These frameworks reveal a sequence of occupation that not only reflects changing environmental conditions but also evolving subsistence strategies, technological innovations, and sociopolitical structures. The chronology from the Paleoindian through the Leon-Jefferson period represents a dynamic cultural landscape that continually responded to both internal and external stimuli.

The Paleoindian period, marking the earliest human presence in Florida, began near the end of the Pleistocene epoch. During this time, sea levels were approximately 59 meters lower than present, and the landscape consisted of xerophytic oak-pine scrub (Milanich 1994:38). Potable water was scarce and likely limited to karst sinkholes (Dunbar 1991:185–213). This environment remained intact until approximately 5,000 years Before Present (B.P.), limiting widespread human settlement (Watts 1975).

Artifacts from the Paleoindian period are predominantly found as surface finds near rivers such as the Suwannee, St. Marks, and Chipola (Milanich 1994). The Suwannee point is the most iconic, described as “slightly waisted...with a concave base” (Bullen 1975:55). The toolkit also included unifacial scrapers, microliths, and bolas. Organic tools and textiles from sites like Little Salt Springs illustrate advanced adaptations using wood, shell, and bone (Clausen et al. 1979; Waller 1976).

Subsistence strategies included a broad range of fauna and flora, indicating a diversified diet rather than exclusive megafauna dependence (Bense 1994:38–47). White-tailed deer, rabbits, opossums, and various fish and shellfish were commonly resourced. Archaeological data suggest that PaleoNative Americans possessed the technological flexibility to respond to diverse environments. Despite the limited number of sites west of the Apalachicola River, it is premature to suggest Paleoindian populations were sparse in this region (Milanich 1994:42).

The Early Archaic period emerged around 9,500 B.P., as rising sea levels began transforming ecosystems. This led to more abundant wetland environments and a shift in settlement patterns. Early Archaic sites appeared in a broader range of locations, signifying increased population and adaptive versatility (Milanich 1994:64). While similar in some ways to the preceding Paleoindian lifestyle, the Early Archaic shows more diversity in material culture, particularly in projectile points like Bolen and Kirk Serrated types.

The Middle Archaic, beginning around 7,000 B.P., was characterized by continued adaptation to increasingly wetter conditions. Larger surface water sources supported more widespread and complex settlements, including base camps and freshwater shell middens (Tesar 1980). Middle

Archaic habitation sites often overlooked lakes, swamps, or sinks and displayed seasonal occupation patterns consistent with a band-level society. These social units were mobile, organized around seasonal rounds of environmental resource use.

Tool technology advanced with heat treatment of lithics, resulting in easier-to-work materials. This process left the stone reddish or bluish in color and improved workability. Diagnostic artifacts included Newnan and Hillsborough points, and to a lesser degree, Alachua, and Marion types. Organic artifacts such as bone pins and fishhooks reflect a continuing reliance on aquatic resources.

By the Late Archaic, around 5,000 B.P., climate conditions had stabilized into a pattern similar to today. This period saw cultural regionalization and greater exploitation of estuarine and freshwater resources. Though fewer Late Archaic sites have been documented in northwest Florida compared to other regions, the significance of wetland ecosystems is evident (Milanich 1994:85). These habitats provided rich and predictable sources of food and raw materials.

Ceramic technology made its first appearance in this period, with fiber-tempered wares like Norwood ceramics prevalent in the region. These ceramics were often tempered with palmetto fibers or Spanish moss. Attempts to distinguish Norwood from the Orange series of East Florida remain inconclusive (Phelps 1965). Satilla ceramics, found in south Georgia, likely represent a related variety.

The Deptford culture (800 BC–700 AD) followed the transitional phase, marked by distinctive check-stamped and simple-stamped ceramics produced using carved paddles (Milanich 1994:111). These ceramics differ significantly from Late Archaic fiber-tempered pottery. Their stylistic consistency allows for temporal subphases and cultural diagnostics (Tesar 1980:680). This visibility contributed to Deptford's early identification in the archaeological record.

Deptford sites include shell middens, burial mounds, and inland middens. Coastal shell middens are commonly situated in live oak-hickory hammocks adjacent to salt marshes. Inland sites, often near springheads and lakes, suggest either intensive inland habitation or secondary exploitation of resources (Milanich 1973; Tesar 1980:78). Each site type reflects differing functions within the cultural landscape.

Burial mounds associated with the Deptford period, such as Yent and Pierce Mounds, reflect increasing ceremonialism. These are linked to the Yent Complex, which includes exotic artifacts such as copper panpipes and stone plummets (Sears 1962). Such artifacts indicate extensive trade and sociopolitical differentiation. The rise of ceremonialism suggests greater social complexity and possibly ranked societies.

The Swift Creek culture (100–800 AD), identifiable by elaborately stamped ceramics with cosmological motifs, followed Deptford and introduced significant artistic innovation. This ceramic style supplemented and eventually replaced Deptford wares, especially during the Late Swift Creek phase when vessel decoration became more limited (Anderson 1998). The stylistic evolution likely corresponds with shifting ritual and sociopolitical roles. Coastal and interior distribution patterns suggest a mix of mobile and more permanent settlement strategies.

Swift Creek communities were involved in wide-ranging trade and ceremonial networks. Inland sites often sit on arable soils, hinting at horticultural practices. Structural remains are rare, especially along the coast, but tools such as manos and metates have been recovered from sites like Block-Sterns. These finds suggest some dependence on cultivated foods, though hunting and gathering remained essential.

Weeden Island culture (500–1000 AD) evolved from Swift Creek traditions and is primarily defined by distinct ceramic styles. Scholars divide Weeden Island into multiple subperiods based on stylistic changes, including the increasing prevalence of Wakulla Check Stamped pottery and the eventual disappearance of complicated stamping (Percy and Brose 1974; Willey 1949). This typology allows finer temporal control over archaeological interpretation. Regional variants developed based on both social and environmental differences.

Settlement patterns continued earlier trends, with sites located near freshwater and estuarine environments. The transition into Wakulla Weeden Island (Weeden Island 4 and 5) involved a greater emphasis on maize agriculture and interior settlement, potentially due to environmental or demographic pressures. Interior settlement may also reflect growing territoriality. Increased burial mound frequency suggests heightened ceremonialism.

Wakulla Weeden Island sites often comprise small villages with nearby burial mounds. The ceramic assemblages here—dominated by Wakulla Check Stamped and Weeden Island Plain—highlight regional variation. Lithics, including Hernando points, turtle-backed scrapers, and quartzite tools, reflect both continuity and innovation (Milanich 1994:203). These small village centers likely reflect kin-based communities with agricultural bases.

The Fort Walton period (1200–1500 AD) marked the regional expression of Middle Mississippian culture. Fort Walton sites, characterized by platform mounds and maize agriculture, expanded along major river valleys, though notable exceptions occurred in lake-oriented systems like those in the Tallahassee Hills (Milanich 1994:356; Scarry 1981). These sites include homesteads, hamlets, and major mound centers. Their density suggests population growth or agricultural intensification.

Fort Walton material culture includes sand-, grog-, and shell-tempered ceramics with incised and punctated designs. Lithics were less prominent, but included small arrow points, celts, and greenstone artifacts. Ornamentation included shell and copper items, reflecting the culture’s ceremonial complexity. These artifacts point to continued long-distance trade and ritual engagement.

The final prehistoric period, Leon-Jefferson (1500–1704), reflects the transition of the Apalachee into the early historic era, shaped profoundly by Spanish contact. Settlement patterns continued from the Fort Walton phase, but depopulation and missionization soon transformed village life (Tesar 1980:626). European diseases, forced religious conversion, and political disruption led to cultural decline. These impacts are visible in both material culture and site abandonment.

Early Leon-Jefferson ceramics were well-made, grit-tempered wares, but later examples increasingly incorporated grog and clay. These changes coincide with the arrival of Lamar-influenced pottery from Georgia, supporting theories of population movement and cultural fusion

(Tesar 1980:618). By the Mission Period (A.D. 1633–1704), villages clustered around Spanish churches. Such structural changes signal the end of pre-contact lifeways.

In conclusion, the cultural prehistory of Northwest Florida encapsulates a long trajectory of adaptation and innovation. From early hunter-gatherer communities to maize agriculturalists influenced by Mississippian ideologies, each cultural phase reflects a unique interplay of environment, technology, and intergroup exchange. This archaeological chronology, supported by extensive regional research, offers valuable insights into the resilience and transformation of Native societies in the southeastern United States.

European and African Contact with Native Americans in North Florida and Leon County

The town of Anhaica is believed to have been established around the year 1500. Anhaica was built on the present-day site of Tallahassee as the capital of the Apalachee Province. The historical record indicates that the Apalachee were well known and respected by neighboring groups. The Apalachee province is described as having numerous towns and an abundance of food, and archaeological finds confirm this description. There are many recorded sites dating from the Fort Walton period. The archaeology of the area shows a widespread settlement pattern in which principal towns were surrounded by small villages and individual homesteads. The exact sociopolitical structure of the Apalachee is unclear. Historical narratives suggest that their capital was located at Anhaica, but there may have been an alternate capital at Ivitachuco, which was probably on the Aucilla River. Little information is available about the everyday life of Apalachee. Future archaeological work may one day provide additional information about Apalachee life in the early 16th century and before.

The historical record of Leon County and the project area begins in the early 16th century with Spanish expeditions into Florida. Britain and France also sponsored expeditions to the New World, but their attention would not be directed towards Florida or the panhandle for at least 200 years. The Spanish Crown awarded royal charters (asientos) to expedition leaders to regulate these expeditions and assure the Crown a portion of any valuable resources recovered. Juan Ponce de Leon led the first officially chartered voyage in 1513. De Leon's charter directed him to find and claim for Spain the island of Bimini. However, since the Bahamas were known to the Spanish, it is likely that he sought lands that were further north and west. The expedition sighted the Atlantic coast of Florida, just north of Cape Canaveral, during Easter week in 1513. De Leon's expedition continued south along the Atlantic coast to Charlotte Harbor on the Gulf Coast and possibly as far north as Apalachicola. By 1519, Spain had explored enough of Florida to know that it was a peninsula.

Panfilo de Narvaez was granted a royal charter in 1527 to colonize the region north and east of Mexico, around the Gulf of Mexico, and Christianize its people. De Narvaez's expedition presumably never penetrated the interior of the panhandle area. The only archaeological evidence of this expedition comes from two sites in Wakulla County with early 16th century European material. However, it is unclear whether these artifacts were salvaged from shipwrecks, trade items, or associated with the later de Soto expedition (Bense 1994:246; Jones 1993). Hernando de Soto was the next to explore the panhandle during the winter of 1539-1540. After landing at Tampa Bay in May 1539, the expedition continued north to present-day Tallahassee where they spent the winter at the Anhaica. Calvin Jones identified a portion of Anhaica in the front yard of the Governor Martin House on Lafayette Street in 1987. De Soto sent a scouting party west towards Pensacola. Although de Soto turned his attention to the northwest, the reports of a magnificent bay by his scouting party would influence unsuccessful plans to colonize the Pensacola area by Tristan de Luna y Arrellano in 1559.

A sustained Spanish presence in the area did not occur until a system of missions was built to Christianize the Apalachee, beginning in 1633 with the establishment of Mission San Luis de Apalachee by Franciscan friars Pedro Munoz and Francisco Martinez. This mission was moved to a more strategic location, nearby, in 1656. The new San Luis de Talimali served as the administrative and military capital of the Apalachee missions until 1704.

By 1674 there were 13 operating missions in the province of Apalachee (Hann 1988:32). Spanish desires to proselytize the Apalachee fulfilled religious obligations that stemmed from the reconquest of Spain from the Moors. Secular motives stemmed from the strategic importance of St. Augustine. St. Augustine was in a relatively infertile area and depended heavily on locally produced resources and a chronically unreliable royal subsidy. The establishment of the missions in the fertile Apalachee Province provided a source of foodstuffs and security to St. Augustine (Shapiro 1986:8-9). To help provide security to the area, a wooden stockade, San Marcos de Apalachee, was constructed south of San Luis de Talimali in 1679.

The first enslaved people from Africa arrived in Spanish-controlled Florida in 1526 (Rivers 2000:2). Beginning in 1686, Spanish Florida attracted numerous runaway Black people escaping from slavery in the English colonies. For those converting to Roman Catholicism, Spanish authorities made them freedmen. The decree of Spain's King Charles II of November 7, 1693, made the policy official. This move, however, did not free those enslaved under Spanish governance in Florida – it only applied to those running away from the English. Slavery continued to exist in Spanish Florida until the area was ceded to the United States in 1819. The nation of Spain finally abolished slavery in their last remaining colonies, Puerto Rico and Cuba, in 1873 and 1886, respectively.

The Apalachee mission system flourished in relative peace until 1704, when English Colonel James Moore and Creek allies attacked and brought ruin to the province during Queen Anne's War (1702-1713). Only Mission San Lorenzo de Ivitachuco survived the destruction of Moore's invasion. The Spanish abandoned San Luis and San Lorenzo de Ivitachuco. Apalachee survivors fled to San Marcos de Apalachee, south of present-day Tallahassee, while others escaped to Pensacola or St. Augustine. Moore returned to South Carolina with about 1,300 enslaved Apalachee (Shapiro 1986:9). According to Jean-Baptiste Le Moyne de Bienville, the French governor of Mobile, raids into Florida during this time resulted in the deaths of 2,000 Apalachees and the capture of 32 Spaniards, 17 of whom were burned alive. By the end of 1706, because of Moore's attack and further raids, the Spanish presence in Florida had been reduced to St. Augustine and Pensacola. The devastating warfare resulted in the Apalachee abandoning their homelands and resettling in the Carolinas, Georgia, and Alabama.

Beginning in the 1730s, Lower Creeks migrated into the former territories of the Apalachee and Timucua in northern Florida. Gracia Real de Santa Teresa de Mose was established in the vicinity of St. Augustine in 1738. Also known as Fort Mose, it was established by Manuel de Montiano, Spanish governor of Florida, as the first free Black settlement in Florida. The community was a haven for runaways from the English colonies of South Carolina and Georgia. While most free Black people resided in the vicinity of St. Augustine, runaways began moving into the vicinity of present-day Tallahassee during this time, especially along the Apalachicola River, where they built farms with the knowledge they acquired from plantation work.

In 1763 Spain traded Florida to Great Britain for Havana, Cuba, which was captured by the British during the Seven Years War (1756-63). This conflict, also known as the French and Indian War, resulted in a large acquisition of territory in North America by Great Britain.

U.S. Military Intervention in North Florida and the Acquisition of Florida

The colonies of East and West Florida remained loyal to the British crown during the American Revolutionary War, but after the close of the conflict, they were returned to Spanish control in 1783 through the Treaty of Paris. The fledging United States viewed the Spanish presence in Florida as a threat to its interests in the region. The Gulf of Mexico was a natural boundary between the U.S. and much of Spain's territory in the New World, so American leaders were concerned that an adjacent Spanish presence in Florida compromised the nation's security. Moreover, the lack of control exhibited by the Spanish in Florida was viewed as troublesome by the United States government: Florida was a haven for runaway enslaved people, while British traders and adventurers were believed to be agitating Native American tribes and Black freedmen against U.S. settlers in the region.

During the first Spanish period, the territory was opened in 1704 to fugitive African Americans from British colonies to the north. Gracia Real de Santa Teresa de Mose, three miles north of St. Augustine, was established by the Spanish government as a refuge for runaways in 1739 (Garvin 1967:1). The following year, British colonists lead by James Oglethorpe descended upon St. Augustine, destroying the fort and driving out its inhabitants (Garvin 1967:2). Further to the west, Black immigrants found refuge among a faction of Creek Native Americans called Seminoles, working alongside them and forming settlements along the Apalachicola and Suwannee Rivers (Garvin 1967:2-3).

By the early 19th century, it was estimated that more than 1,000 runaways and free Black people were living among the Native Americans in Florida (Brown 1995a:289). This presence was a great concern to the U.S. government and was, in part, what started the Seminole War of 1817 and 1818 (Wright 1986:202-203). During the First Seminole War, Andrew Jackson descended the Apalachicola River, under presidential approval, to "chastize hostile Native Americans and Negroes and…follow them into their Florida sanctuaries if necessary" (Wright 1986:203). Jackson led a group of Regulars and Georgia militia into Florida, destroying several small villages, inhabited almost entirely by Black people, along the east side of the Apalachicola River (Garvin 1967:4). In the subsequent years following the First Seminole War, a massive influx of white settlers migrated into Florida, pushing the Indian and Black populations deeper into the peninsula and preventing any substantial efforts at re-establishing pre-1816 conditions within the region (Garvin 1967:5). Jackson went on to attack Spanish settlements, capturing forts at St. Marks and Pensacola. Spain began to realize they were unlikely to be able to maintain control of Florida, and in 1819 they ceded the territory to the United States with the signing of the Adams-Onis Treaty.

Directly following the signing of the Adams-Onis Treaty, Andrew Jackson, newly appointed Provisional Governor of Florida, requested permission from his superiors to attack Red Stick Creeks and free Black people residing along the Peach and Manatee Rivers in April 1821. Secretary of War John C. Calhoun declined Jackson's request and ordered him to take no immediate measures. The raids were undertaken instead by Jackson's Creek allies, William McIntosh and William Weatherford. While the Red Stick settlement escaped harm, Black settlements at the Manatee River, as well as some along the Gulf coast, were not so lucky. They, as well as Creek and Seminole communities in what would become Alachua, Marion, Sumter, Hernando, and Hillsborough Counties, suffered significant damage from the raids (Brown 1995b: 421). These raids served to move these populations off valuable agricultural lands to make way for white settlers to immigrate. The resulting influx of plantation owners brought with them increasing numbers of enslaved Black people, some of whom, within the Tallahassee region, may have included the ancestors of the New Hope community.

In its infancy as a U.S. territory, Florida was divided into West Florida, with its principal city of Pensacola, and East Florida, with its principal city in St. Augustine. The first meeting of the Territorial Council, the precursor to the Florida Legislature, was held in 1822 in Pensacola, and the following year the group convened in St. Augustine. It quickly became evident that the great distance between the two towns was creating difficulties in governance, so the Council decided to find a central location for conducting their duties. In 1823, representatives from the former East and West Florida selected a location near the old Seminole village of Tallahassa Taloofa, and, in March 1824, it was announced that the next Council meeting would take place in Tallahassee. On May 24, 1824, Congress appropriated a section of land and established Tallahassee as the new seat of government for the Florida Territory (Works Progress Administration 1941).

Tensions continued to rise between white settlers coming in search of new agricultural land and Native Americans and their associated Black populations in the region. After the Treaty of Payne's Landing in 1832, which called for Seminole removal from Florida, a series of small incidents led to Dade's massacre, in 1835, which started the Second Seminole War. Regarded as one of the longest and most costly of the many conflicts between the United States and Native Americans, the war resulted in only a few hundred indigenous people remaining in Florida. No peace treaty was ever signed, but the war was declared over on August 14, 1842, by Colonel William Jenkins Worth.

Antebellum History of Leon County and the Development of the Plantation System

Tallahassee's Red Hills attractant, prehistorically and historically, was its subtropical climate and the substantial acreage of Orangeburg soils in the area, which were ideal for cotton and corn – the mainstay of Leon County agriculture. These elements enticed planters and yeoman farmers from Georgia, Virginia, North Carolina, and South Carolina. Agriculture was never viable on a large scale in the southern part of the county where the soil is sandy, leached, and acidic (Brueckheimer 1992; Paisley 1968, 1989). Native Americans knew well the significance of the climate and soils of the area. Horticulture in the region became important during the Swift Creek period.

During the later prehistoric periods, the upland soils of the Tallahassee Red Hills saw the growth of maize, squash, pumpkin, and other crops. Narratives from de Soto's expedition described fertile fields of maize, beans, pumpkins, and fruit. The fields were described as "on both sides of the road and have spread out as far as the eye could see across two leagues of the plain" (Clayton et al. 1993). These fields later became known as "old fields," and settlers paid higher dollar to obtain them. By the time the Spanish arrived in the 16th century, Native Americans had well-developed agricultural practices in place. Fertile soil, along with available water resources, was ideal not only for growing crops but also as an attractant for birds and game. These agricultural areas were sought after by settlers due to Native American agricultural practices. Controlled burns kept the area's vegetation growth to a minimum, added nutrients to the soil, and attracted birds and other game. Fields were tilled by hand, which resulted in nutrient-dense soils and very little erosion .

In 1823, William H. Simmons and John Lee Williams decided upon the site of Tallahassee as the location for the new capital. In 1824 and 1825, the Federal Land Office surveyed more than 20 townships using the township and range system. In 1828, the Tallahassee Land Office sold 140,587 acres for $189,182. Within 20 years most of the land in the county was sold to planters, yeoman farmers, land speculators, and investors. Florida achieved statehood in 1845. There was not a lottery system that limited the amount of land an individual could buy. Planters in Florida were only limited by what they could pay at auctions. The lower production of exhausted lands in the older cotton and tobacco regions and the growing cotton market in Europe created a boon for planters in Middle Florida (Gadsden, Hamilton, Jefferson, Leon, and Madison Counties). Planters from regions to the north were moving south and buying large swaths of property to farm cotton to supply a growing market in New England and overseas (Brueckheimer 1992; Paisley 1968, 1989). In the early 1830s, the Marquis de Lafayette sent French settlers to develop lands overlooking Lake Lafayette. The goal was to build a silk industry, grow grapes, and develop a winery. This attempt failed.

The county's population grew rapidly in the early years. Between 1825 and 1840 the population grew from 966 to 10,713 before leveling off at around 12,000 in 1860. The white population remained stable, from 3,300 in 1830 to 3,194 in 1860, while the enslaved population nearly tripled, from 3,152 to 9,089, during that same period. County tax rolls revealed that 48% of the population of Leon County were enslaved people in 1830, and by 1860 that percentage had increased to 73% of the total population (Rivers 1981:237).

While the enslaved population increased in size in Florida, the population of freedmen remained stable or decreased. The perceived threat of "free negroes" resulted in the passage of several laws by the territorial government. In 1827, freedmen were banned from entering Florida, and in 1828 they were prohibited from assembling in public. An 1829 statute required a fee of $200 for freeing enslaved people. Once freed, they were required to leave the territory within 30 days. Leon County, the wealthiest and most populous county in Florida, petitioned the state government to have all freedmen removed from the state. Instead, 1847, the legislature required all freedmen to have a white person as legal guardian.

The development of transportation systems was important to draw settlers to the area and provide access to markets. A system of roads and trails in the area was connected to Thomasville, Bainbridge, and Quitman by the Coffee Road, while an east-west federal road provided a route from Tallahassee to Pensacola and St. Augustine (Smith 1973). The ports of Magnolia and St.

Marks, on the St. Marks River, served as export/import locations for the area. The Tallahassee Railroad, completed in 1837, provided a primitive link, which consisted of mules pulling cars on wooden rails, from Tallahassee to St. Marks and the Gulf of Mexico. For many years this was the city's only rail line. In 1855 the Pensacola & Georgia Railroad purchased and began modernizing the Tallahassee Railroad. The company also began construction of a rail line eastward from Tallahassee to Lake City, which was completed in 1860. Between 1832 and 1852, some plantation owners hired-out enslaved people to the Tallahassee Railroad Company. An advertisement from the *Florida Sentinel* placed by the company offered $180 for the year for enslaved workers (Rivers 1981:242). At Lake City, the Pensacola & Georgia connected with the Florida, Atlantic & Gulf Central, which provided Tallahassee a rail route to Jacksonville. During the Civil War, a line was built north from Live Oak, Florida, to Lawton, Georgia, connecting the Pensacola & Georgia to the Atlantic & Gulf Railroad in March 1865. This line, the first between Georgia and Florida, provided Tallahassee rail access to Bainbridge and Savannah.

The plantation system in Leon County was no different from the rest of the South. The planters, loosely defined as anyone who owned 20 or more enslaved workers, dominated the economy, local and state government, and other institutions. Plantations consisted of large acreage with only portions "improved" with buildings or structures. The vast majority of the plantation was devoted to agriculture fields or, possibly, pasture. Livestock was generally left to roam free, with fencing designed to keep them out of the fields. A general antebellum plantation layout was a localized setting of structures that may have included a combination of a main house, slave cabins located near the main house, the overseer's house, other domestic structures, and a slave cemetery. Plantations may have had a gin house, sugar mill, wheelwright, tannery, and grist mill. Many of those enslaved on the plantations in Leon County learned skilled and semi-skilled trades, such as blacksmithing, carpentry, and other trades. They would work in cotton production from March to the end of November and work in their trades in the off-season. Census data from 1850 suggests that enslaved labor was utilized in most industries throughout the nation (Rivers 1981:241). There were about twice as many yeoman farmers as planters in Leon County in 1860. Typically, yeoman farmers owned less than 20 enslaved workers and practiced subsistence farming while planting cotton as a cash crop. These farmers worked in the fields alongside their enslaved workers. They likely owned one or more draught animals, hogs, poultry, and milk cows.

Most of what was produced in Leon County in the antebellum period was locally consumed with the only major export being cotton. Cotton sales provided the necessary cash to import the goods that the planters and farmers needed to continue their operations. If cotton was the cash crop, corn was the energy crop that provided fuel for animals and man. Corn was eaten fresh, dried, or shelled. It was ground in grist mills to make flour. It was also used to fatten hogs, cattle, and poultry.

At the dawn of the Civil War, Leon County far outpaced the other counties in Florida in agricultural production. The county led in the number of farms, harvested land, draught, and dairy animals, and in the production of cotton, corn, sweet potatoes, and livestock. In 1860, Leon County produced over 16,000 bales of cotton, over twice its nearest rival, Jefferson County.

The Civil War and Reconstruction

Soon after Florida seceded in January 1861, Union ships blocked the major ports of the Gulf. The export of cotton dramatically decreased, and poor rail connections with other Confederate states effectively isolated Leon County. After the war, Confederate currency and bonds were worthless. The economic loss was overwhelming. Federal agents seized cotton and other resources to pay taxes. Leon County was effectively bankrupt.

Some of the earliest operations of U.S. Colored Troops (USCT) fighting for the Union took place in Florida. Led by Colonel Thomas Wentworth Higginson, a white officer, several companies of his regiment of Black soldiers participated in a raid up the St. Mary River, along the Georgia-Florida border, in January 1863 (Florida Memory 2013). USCT continued to play a part in the war in Florida and made up the majority of the Union troops engaged in a skirmish south of Tallahassee at Natural Bridge on March 6, 1865. Confederate forces won the battle, but USCT returned to Tallahassee two months later, on May 20, 1865, and were part of the Union occupying force that entered the capital to receive the surrender of Confederate Florida (Florida Memory 2013).

Though Leon County remained largely uninvolved in armed conflict during the Civil War, except for the Natural Bridge skirmish, its economy, being dependent on cotton mono-cropping, had been severely crippled. In the immediate aftermath of the Civil War, cotton prices were unstable, with the price in the Liverpool market in 1865 being 50-54 cents per pound, dropping to below 40 cents per pound by January 1866 and continuing to drop over the subsequent months, reaching a low of 18 cents per pound in May of 1866 (Ouzts 1996:5).

After the war, the agricultural system changed from one based on enslaved labor to one of tenancy. In May 1865, General John Newton, commander of Union forces in Florida, issued a decree urging freedmen to enter into agreements with landowners to cultivate, harvest, and share the incoming crops. This change in the labor system and the need to adjust to the instability of the cotton market resulted in a change in agricultural production methods. Instead of enslaved workers living together in slave quarters and working together in labor gangs, the freedmen were now scattered over the plantation, farming their own individual small plots. Tenant homes were located throughout the landscape, near the most agriculturally productive areas, thereby creating “patch crop” farming. This new way did not prove financially lucrative to landowners, and they began to look for different ways to turn a profit. Depleted soils caused by the aggressive mono-cropping of cotton during the antebellum years contributed to low crop yields during the Reconstruction era, and during the disastrous 1866-1868 period, many planters abandoned their pursuits in Leon County and began selling off their plantations. Regardless, agriculture in Leon County continued to be dominated by the stagnant cotton culture well into the 20th century (Ouzts 1996:18-23). Between 1865 and 1880, while the white population in Leon County was slowly dwindling, the population of newly freed Black people swelled. In 1870 the population of the county consisted of 12,341 Black and 2,895 white people. Ten years later, the African American population had increased to 16,840, while the white population had remained relatively unchanged, falling slightly to 2,822 (Ouzts 1996:15-16).

Community Development

African American Churches in Leon County

When studying the development of African American communities in the South, such as the New Hope Community, one must study the development of Black churches after the Civil War, because churches served as the backbone of those communities. With the failure of Reconstruction and the advent of Black Codes, the newly emancipated population was barred from participating in many social, political, and economic activities over which the whites held control. The churches were the one institute in which African Americans chose to separate from the white population. This "self-segregation" enabled them to establish a semblance of autonomy and control over their lives. According to Robert L. Hall, in his article "Tallahassee's Black Churches, 1865-1885,"

> The development of religious freedom and the establishment of independent churches by Blacks, following the Civil War, was a momentous change in Black-white social relations. Although the Black churches of various denominations shared a general feeling of assertiveness and independence, the individual churches in Tallahassee, representing distinctive denominations, were not uniform in their historical origins, political orientations, or leadership styles (Hall 1979:185).

Many Methodist freedmen joined the African Methodist Episcopal (AME) Church, which was founded in Philadelphia, Pennsylvania, in 1786. Ministers had begun proselytizing newly freed African Americans across the South during the Civil War, following the Emancipation Proclamation. By 1868 the Tallahassee district had 13 AME Churches. (Hall 1979:186). Due to the denomination's size, AME congregations became actively and effectively involved in politics, temperance initiatives, and education efforts. The large increase in AME membership was the beginning of "self-segregation" and resulted in a significant decrease in the size of some southern, white-controlled denominations.

Some Methodist freedmen stayed in the Southern Methodist Episcopal Church following the war. About 500 in Florida continued to retain ties with the church through 1869. The appeal of belonging to an independent denomination, however, was too strong for the African Americans. This resulted in the organization of the Colored Methodist Episcopal (CME) Church of America in 1870.

Newly freed African American Christians also had a choice when it came to Baptist denominations in Tallahassee, such as Missionary Baptists or Primitive Baptists. The Reverend James Page founded Bethel Missionary Baptist Church, with a congregation of around 200 people, near downtown Tallahassee in 1870. Rev. Page, who was ordained as Florida's first Black minister, had been preaching since 1835, when he was an enslaved person on the Parkhill Plantation. He was so well respected and sought after that, before emancipation, he would travel to Tallahassee and surrounding plantations to preach (Bethal Missionary Baptist Church, 2018).

The Primitive Baptist Churches of the South established a separate organization for African Americans in 1865, the Colored Primitive Baptists in America. The Florida Primitive Orthodox Zion Baptist Association was founded in 1869. Tallahassee's first Primitive Baptist Church, St. Mary's, grew so quickly that a new, larger church was built in 1873.

Organizationally speaking, Baptist churches were less structured than the Methodist denominations, which had a national organization run by bishops. The Baptist churches were self-governed and functioned as loose coalitions of autonomous congregations. This autonomy allowed Black Baptist denominations to expand quickly, as needed, with less bureaucracy. In Tallahassee, Black Baptist churches, whose ministers and members were mostly formerly enslaved people, enjoyed a large amount of independence in their leadership governance and spiritual expression (Hall 1979:193).

With the appearance of Jim Crow and the legal implementation of White Supremacy throughout the South following Reconstruction, Black churches took on another level of significance to their congregants. Centers of spiritual power, churches also became de facto centers of political power. With almost the entire Black community disenfranchised by Jim Crow's literacy tests and poll taxes, there were very few political leaders who worked in the best interests of Black citizens. In a world of "separate but equal," white elected leaders viewed their white constituencies as "more equal" than the local Black communities. African American churches became "non-governmental organizations" that helped represent their members in the outside world, beyond the sanctuary. Church pastors served, in many ways, like elected government leaders. It is no coincidence, therefore, that many of the most prominent and effective leaders in the civil rights movement of the 1950s and 1960s were clergy of African American churches.

The Establishment of Testerina Primitive Baptist Church and Tuskeena School

Testerina Primitive Baptist Church has been important to the African American community along Miccosukee Road for over 150 years. A backbone to the community, the church, located northeast of Tallahassee, has a marble cornerstone that states that the church was established in 1871. According to a "Historical Sketch" of the church in the John G. Riley Center & Museum digital archives, the church "was first organized in a brush hobble about one-half mile east of its present location just a few years after emancipation of the Slaves" (John G. Riley Center & Museum N.D.). A *Tallahassee Democrat* newspaper article, commemorating the church's 100th year, claimed the congregation was officially formed July 21, 1871, "by a handful of ex-slaves, many of whom had worked on the numerous Big Bend plantations before emancipation." The article states, they "'got religion,' built an arbor of logs and palm fronds, northeast of Tallahassee." Testerina's centennial in 1971 was a five-day celebration that featured sermons from preachers of other Primitive Baptist congregations in the state and out-of-town gospel singing groups. The highlight of the festivities was a Saturday night banquet at the Carriage House restaurant with Dr. Benjamin L. Perry, president of Florida A&M University, as guest speaker (N.A., *Tallahassee Democrat* [TD], 1971, 20 July:7).

Congregants believe that the first church building was erected between 1865 and 1890. Church tradition states that two wooden churches preceded the current church. Gloria Jefferson Anderson, a long-time member of the congregation who has conducted research on the church's history, believes these earlier churches were located closer to Miccosukee Road. It is believed that the first classes for Tuskeena School were held inside the church. An early reference to Tuskeena is in *The Weekly Floridian* newspaper of September 19, 1891, which names Mamie McGriff as the teacher for the new term (N.A., *The Weekly Floridian* [WF], 1891, 19 September:5). Tuskeena and Testerina were located on the same site, eventually in separate buildings, for at least 60 years. This site was on a tract of land directly south and adjacent to a parcel of land known as New Hope Plantation.

New Hope Plantation

The focus of this report is on the African American community of New Hope, as mentioned in the introduction to this historical narrative. While focusing on the people of this community, however, it is essential that their origins and the world in which they and their descendants lived be taken into account. Therefore, a relatively large amount of information is provided in this report about white plantation owners and the land they owned. This is possible because a vast amount of historical data about plantation owners is available, whereas relatively little is known about those who actually worked on the land. It is important to note here that much of the success of these plantation owners should be attributed to the large source of uncompensated labor, in the form of enslaved people, that they had at their disposal.

As much information as possible has been included here about the African Americans who lived in the New Hope Community. Those held in bondage are almost entirely invisible to history. The only evidence of their existence might be their first names, found on the tax records of their "owners." Those who lived in this community before the Civil Rights Movement were legally marginalized; economically, socially, and politically. Nonetheless, they must be all recognized among the many anonymous Americans of different racial and ethnic backgrounds whose crushing, backbreaking labor built this country. Indeed, even after emancipation very little historical information was recorded about Black communities, well into the 20th century.

Paisley (1989) documents three large antebellum plantations located around Miccosukee Road in the vicinity of Testerina Church: LaGrange, Barrow Hill, and The House Place (see Figure 2). The large parcel of land known as "New Hope Plantation" was originally part of LaGrange Plantation. LaGrange Plantation also included the land upon which Testerina is located. Barrow Hill Plantation consisted of two tracts. The smallest, approximately 3,000 acres, was west of LaGrange and in proximity to Tallahassee. The larger Barrow Hill tract was adjacent to LaGrange, on the east side. This section of Barrow Hill is near the present-day community of Chaires. On the northwest side of LaGrange was The House Place, which was established by R. A. Whitfield on approximately 1,300 acres.

The biggest of these plantations, LaGrange, was established by Joseph John Williams, the largest cotton and corn producer in Leon County in 1860. Much of Williams' land was inherited from his late father-in-law, Noah Thompson. Thompson also owned a second plantation, Clearview. The location of Clearview is not known, but, regardless, Thompson's estate was quite extensive. Including agricultural equipment, draught animals, and enslaved people, his estate was worth over $114,000 in 1855. (Smith 1973:227). After Thompson's death, New Hope Plantation was absorbed into his son-in-law's LaGrange Plantation.

LaGrange Plantation extended approximately a half mile north of Miccosukee Road and over two miles south of Buck Lake Road. Williams owned about 7,000 acres, described as situated on the largest area of Orangeburg sandy loam in the county, and 245 enslaved people. Tax rolls indicate that LaGrange, which included New Hope Plantation, was worth $121,000, with a value of $150,000 placed on his enslaved workers. On the eve of the Civil War, Williams' plantations produced 1,113 bales of cotton and 10,800 bushels of corn on 3,900 acres of improved land. Williams served as a Confederate colonel in the Florida Militia and lost much of his land during Reconstruction. Following Reconstruction, Charles E. "C.E." Bradley of Spencer, New York, purchased most of Section 12, Township 1 North, Range 1 East in 1884 from Eliza Thompson Williams, the widow of Williams and the daughter of Thompson (see Figure 3). Referred to in the deed as "'New Hope' plantation," the purchase amounted to 984.76 acres, more or less (Leon County Courthouse, Tallahassee, FL [LCC] 1884: Deed Book [DB] Z:308). C.E. Bradley was one of many Northerners who came South in the late 1800s and purchased large quantities of inexpensive agricultural land with the intention of trying their hand at farming.

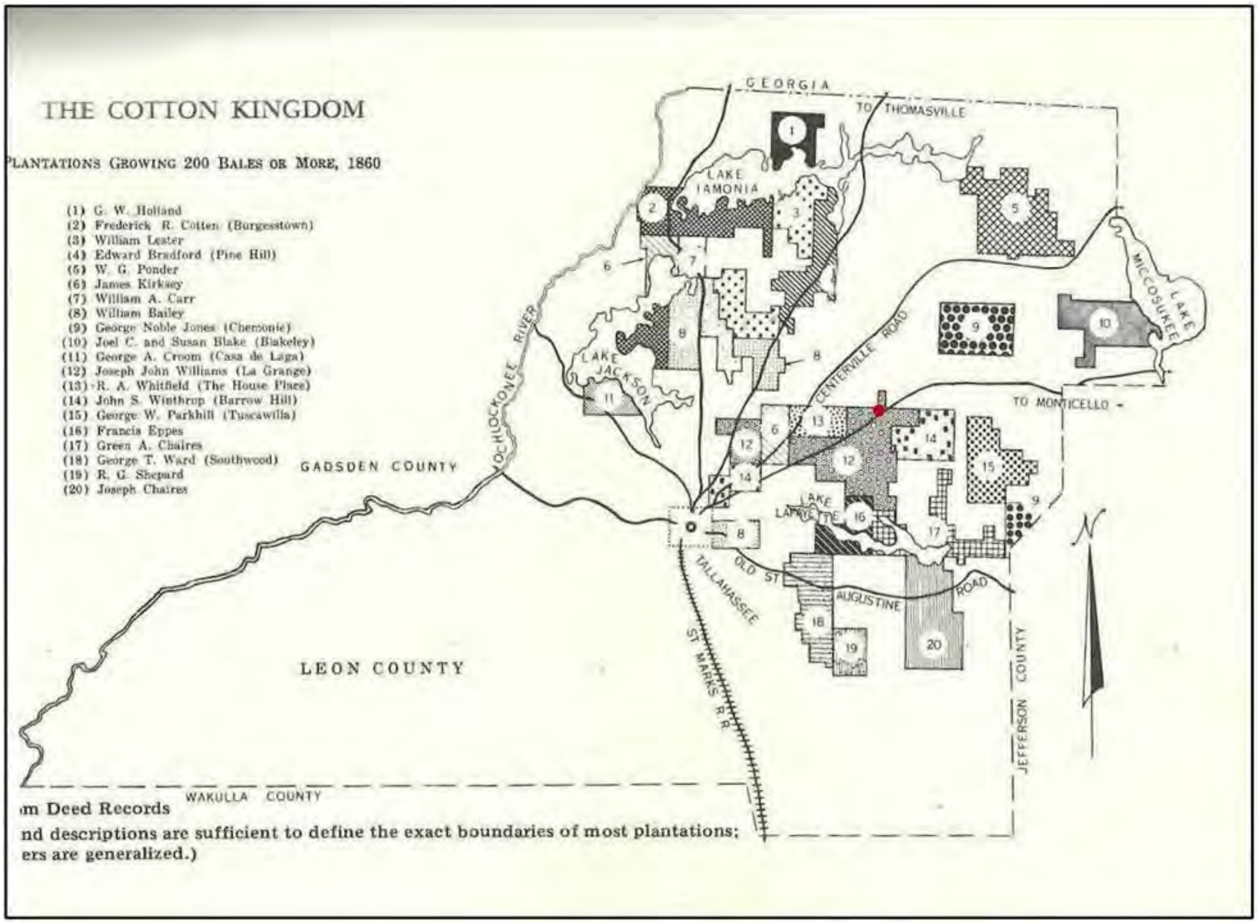

Figure 2. Map of the largest antebellum plantations in Leon County in 1860. Approximate location of New Hope Plantation is indicated by red dot. Source: Paisley 1968.

A great variety of agricultural activity occurred at New Hope Plantation, according to some newspaper reports. Bradley experimented in horticulture and engaged in animal husbandry. Contrary to popular contemporary belief, New Hope Plantation was not initially a "dairy farm." Notices in The Weekly Floridian of Tallahassee mention Bradley's early work. One of his first crops was Thomas "Velvet Cob" corn, which had "beautiful white grains and is weevil proof." Another notice mentioned that "Mr. C.E. Bradley of New York . . . is another Northern gentleman who is successfully conducting a large plantation in Leon County." He planted a variety of fruit trees and had recently planted 2,500 English walnuts at "New Hope." Also, as he replaced his old fencing with wire fencing, "wherever a post was put there he had a pecan nut planted." Throughout the coming decades, much mention is made of Bradley in the local newspapers with respect to his comings and goings between Tallahassee, his winter home, and his hometown of Spencer, New York. Bradley's success with the farm was mentioned in *The Weekly Floridian* in Spring 1887. According to the notice, "Mr. Bradley is a New Yorker, uses improved farming implements, cultivates thoroughly and is making money on his plantation." Bradley had planted 800 pecan trees along his fence line. One of his 6.5-foot stalks of rye was on display at Saxon and Company. He was recognized in a notice entitled "Fine Cotton" in *The Weekly Floridian* in September 1888. It was reported that an eight-foot-tall cotton stalk of the "J. Welford variety" grown on Bradley's plantation was on display at Saxon & Company. The manager of New Hope Plantation, J.G. Hamlin, stated that he had 2.5 acres planted in this particular type of cotton, and he expected the patch to produce three bales -- over a bale an acre -- which would have been a good yield (N.A., WF, 1887, 24 March; N.A., WF, 1888, March:10).

In addition to his own farming enterprises, Bradley had sharecroppers, or tenant farmers, on his land. One individual who lived and worked at New Hope Plantation during this time was Wade Williams, "a young colored man." As reported by *The Weekly Floridian*, Williams went to work without a dollar, but with a rented ox, rented land, and "a determination to succeed," and he made his crop on a store account of "Messrs. Saxon and Company" of $6.00. He told the newspaper reporter that he produced "four bales of cotton, one hundred bushels of corn, several stacks of fodder and a big crop of potatoes and garden trucks." He was able to pay his rent and other expenses and "has a snug sum of money left" (N.A., WF, 1888, 27 November:5).

A note in *The Weekly Floridian* in mid-1889 bragged on the success that Bradley brought to New Hope Plantation. Despite a drought, "his oats stand, on average five and a half feet high, is heavily headed, and the yield has been immense." He also had "an excellent corn crop, and potatoes in quantities and of fine quality." Bradley's success was attributed to his "mode of cultivation" and his "excellent and fertile land" (N.A., WF, 1889, 4 June:5).

Many ads are found in which Bradley advertises for sale his seed oats, Scotch Collie puppies, and Poland China pigs. Apparently, he also tried cultivating tobacco: in September 1893, the *Elmira Star-Gazette* reported that Charles E. Bradley had started a cigar factory in the nearby town of Spencer, using tobacco raised on his plantation in Florida (N.A., *Elmira Star-Gazette* [ESG], 1893, 19 September:6).

Just before the turn of the twentieth century is when references to "the New Hope Dairy Farm" first began to occur in local newspapers. Mrs. Sarah Atkinson of "the New Hope Dairy Farm" is mentioned in notes published in *The Weekly Tallahasseean*. The wife of the farm's manager, she was highly regarded. As the newspaper stated, "Mrs. Atkinson has mastered the dairy business in a manner that few people do, and hundreds of people have gone to New Hope during her stay there to learn something of her methods." While at the plantation, the newspaper mentioned that she also worked with a crop of cassava in the 1900 growing season, and that she planned to "plant largely of it another year." The Atkinsons moved to Sheffield, Alabama, in Spring 1901. At that time Bradley reportedly had "one of the finest dairy farms in the county." Continued use of New Hope as a dairy farm at that time may have come to an end with the departure of the Atkinsons. Newspaper references to New Hope as a "dairy farm" would not occur again for another 20 years (N.A., *The Weekly Tallahasseean* [WT], 1900, 29 November:8; N.A., WT, 1901, 14 March:8; N.A., WT, 1901, 17 January:5).

By the middle of the first decade of the twentieth century, C.E. Bradley had apparently implemented the sharecropping or tenant farming system at New Hope on a larger scale. Perhaps, as an older man, he was less interested in agricultural experimentation, or he was physically unable to be as fully involved as in the past. Regardless, Bradley appeared at the December 11, 1906, meeting of the Leon County School Board where he presented a petition for a white school to be established at his New Hope Plantation. He was hopeful that a white school on his property would "encourage some white farmers from Georgia to settle there . . ." The board agreed to build the school for $260.00 "provided that Mr. Bradley would enter into a written agreement with the Board to purchase the building at that figure in case said white settlers became dissatisfied and moved away." It appears, also, that the Bradleys provided a room for the new teacher at the new school. The Tallahassee's *Weekly True Democrat* reported that C.E. Bradley's residence at New Hope Plantation was destroyed by fire on Sunday morning, June 9, 1907. The family lost most of their clothes and household furnishings. The notice also mentioned that Miss Jennie Childs, who boarded with the Bradleys and taught at the nearby school, lost all her clothes in the fire (*Weekly True Democrat* [WTD], 1907, 14 June:1; Leon County School Board [LCSB], Minutes Ledger 1901-1906, 11 December 1906).

By December 1911 a supplement to *The Weekly True Democrat*, entitled "The Lands of Leon," describes New Hope Farm as a 1,000-acre farm "tilled by tenants." The entry states that little individual farming is done by Bradley, but he uses it as a summer home. C.R. Cole was the caretaker, but "Negroes and oxen do the work, making crops of cotton and corn about equally divided; each tenant tending some twenty acres. No fertilizer is employed." Bradley had apparently been unsuccessful in keeping white farmers at New Hope. Cole, meanwhile, focused his energy on chickens, producing some premium Rock Island Red and Black Minorca, which he sold in Tallahassee for table use (Reese, WTD, 1911, 15 December:48).

C.E. Bradley died Friday afternoon, December 24, 1915, at the age of 73 following surgery at City Hospital in Ithaca, New York. In November he was operated on for mastoiditis, but resulting complications resulted in the need for a second operation, which claimed his life. His remains were taken to Spencer and buried in Evergreen Cemetery. Surviving him were two daughters, Mrs. R.H. Fisher of Ithaca and Mrs. A. Benziat of New Orleans, and a son, Lyman R. Bradley of Hartford, Connecticut. Following C.E. Bradley's death, letters of administration for his estate were granted to Lyman, and the estate was valued at $4,000 (N.A., ESG, 1915, 29 December:5).

It appears that at some point shortly after the death of his father, Lyman Bradley decided that he wanted to follow in the footsteps of his father and go into farming. He and his wife, Katherine, took out a mortgage on New Hope Plantation in 1918, and they moved from Connecticut to Tallahassee. It was at this time that Lyman apparently transformed New Hope Plantation into a dairy farm. He was initially successful in his efforts. By 1922 he was working 250 head of cattle and 50 milk cows on almost 1,000 acres. He reported to an interviewer from the Florida Quarterly Bulletin of the Department of Agriculture that he was "enthusiastic" about the climate, soil, and water in Leon County. Experiments with various kinds of grasses, such as Bermuda, Carpet and Napier, and stock foods, like stock peas, velvet beans, burr, sweet and Lespedeza clover had gone well. He had also tried corn for sileage. According to the article, Bradley believed the opportunities in Leon County for the dairy business "to be among the best found in the United States." In that same publication, it was reported that there were 100 farms, from small to large, engaged in Leon County dairy production and that the county had two Black dairy farmers: John Rollins and Tom Carr (LCC 1918: DB 20:264; Florida Department of Agriculture 1922:27, 29). In 1921 the Leon County Milk Company was formed for selling products from area dairy farms, including New Hope. The new company purchased the Purity Ice Cream and Dairy Company milk plant in Tallahassee, near the Seaboard Railroad depot, and installed equipment to produce butter and ice cream. The plant was very successful in its first year and the demand for its dairy products, which were shipped throughout the state, far exceeded its production capacity. The Tallahassee plant was one of several in the state that included the Marion County Creamery, Hernando County Cooperative Dairy, Inc., the Orange County Creamery, and the West Florida Ice Cream and Dairy Company in Jackson County (Florida Department of Agriculture 1922:21).

Lyman continued to grow in notoriety and expertise in the livestock and dairy industries. In July 1922, the Livestock Breeders Association of Leon County elected him second vice president. He was listed as one of the prominent citizens from Tallahassee participating in a motorcade from Tallahassee to Ashburn, Georgia, in February 1923. The trip was made under the leadership of H.L. Brown, extension dairy agent of the University of Florida, and was for local farmers and businessmen to learn about successful dairy operations in Ashburn. According to the article, Ashburn, in Turner County, was at the center of one of the largest and most productive dairy regions in the South (N.A., TD, 1922, 31 July:1; N.A., TD, 1923, 26 February:1).

In July 1923, Lyman Bradley, “manager of New Hope Dairy Plantation,” was endorsed by the Leon County Board of County Commissioners for the Florida Live Stock Sanitary Board. The article noted that “Mr. Bradley is an experienced dairy man” and that “his application will no doubt receive favorable consideration.” Despite his prominent involvement and apparent expertise in livestock breeding and dairy production, Lyman may not have been a very successful businessman when it came to agriculture. He may have had problems with cash flow because a tax notice in the Tallahassee Democrat of July 6, 1923, indicates that he had an outstanding bill of $159.84 on 627 acres of his land. This may be a clue as to why Lyman R. Bradley, after July 1923, never again appears in area newspapers within the context of the livestock or dairy industries of Leon County (N.A., TD, 1923, 12 July:1).

As may be gathered by newspaper accounts, Lyman moved on from the New Hope Dairy Farm business to become a highly successful realtor. In April 1926 it was announced that he had been elected as the newest member of the Tallahassee Real Estate Board. By 1937 he was vice president of the board with his office in the Lewis State Bank Building in downtown Tallahassee (N.A., TD, 1926, 30 April:4; N.A., TD, 1937, 7 March:3). Lyman Richard Bradley died Sunday afternoon, August 7, 1955, at the age of 84 in Tallahassee. It is telling, perhaps, that his obituary makes no mention of his work in the livestock and dairy industries – it highlights that he was a longtime Tallahassee realtor who was elected lifetime president emeritus of the Tallahassee Board of Realtors in 1952. Born in Spencer, New York, December 1, 1870, Lyman attended Cornell University, where he studied civil engineering and was a member of Alpha Tau Omega fraternity.

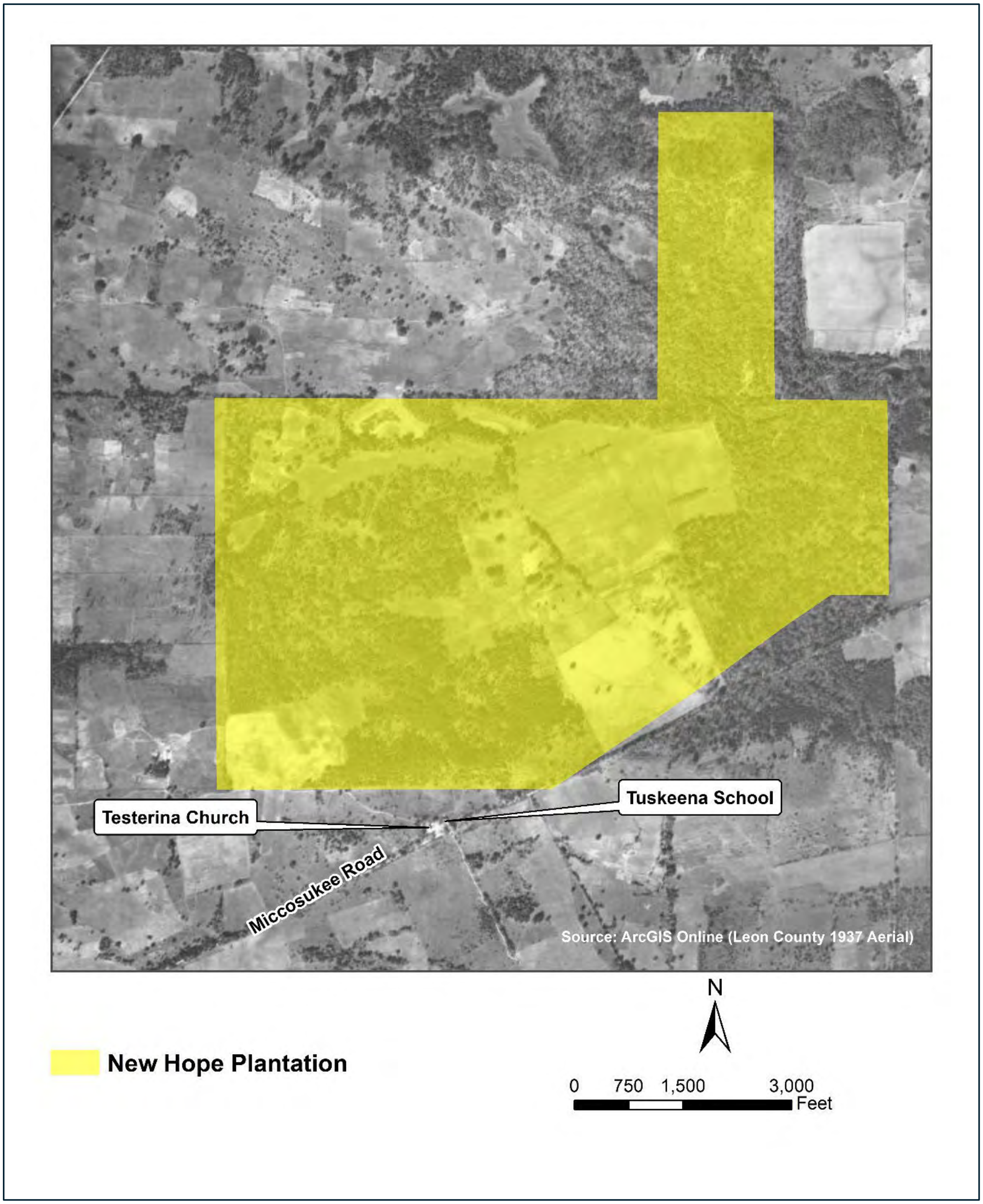

Figure 3. Detailed aerial view of New Hope Plantation, Testerina Primitive Baptist Church, and Tuskeena School from 1937. Source: ArcGIS Online.

The obituary noted that upon the death of his father, he moved to Tallahassee to assume operations of the New Hope Plantation. He also served several years as a deputy U.S. Marshal for the northern district of Florida. Survivors included his wife, Katherine Lewis Bradley; two daughters, Mrs. T. A. Pasto of Tallahassee, and Mrs. Clinton Stimson of Ithaca; and two sons, Lyman R. Hall Jr., of New York City and Ben Bradley of Ithaca (N.A., TD, 1955, 9 August:4).

Katherine Lewis Bradley, the wife of Lyman, died at age 87 in Tallahassee on Friday, June 2, 1961, at Forsyth Memorial Hospital following at extended illness. Mrs. Bradley was born in Spencer, New York, and taught school before she married Lyman in 1897. Her obituary notes that in 1918 they moved to the New Hope Plantation. She was a long-time member of the First Presbyterian Church and belonged to many civic organizations. She was buried beside Lyman at Oakland Cemetery (N.A., TD, 1961, 4 June:8).

Maynard D. ("M.D.") Hazen and his son, Roger N. Hazen, assumed dairy operations at New Hope after Lyman Bradley went into the real estate business. According to the March 25, 1925, edition of *Smith's Weekly* newspaper, Hazen, a native of Boston, Massachusetts, moved to Tallahassee and bought the 900-acre farm adjacent to the Bradley plantation in June 1924. Leon County Deed Book 10, pages 205-206, indicates that Hazen purchased New Hope Plantation from Bradley on February 23, 1925. The article states that the Bradley purchase brought Hazen's combined holdings to 1,905 acres. The article proclaims that "D.M. [sic] Hazen has Wrought Wonders on His Big Farm" (N.A., *Smith's Weekly* [SW],1925, 26 March:5).

The article also states that the Hazen's property was worth $75,000.00 and located seven miles out of Tallahassee on the Miccosukee Road. Mr. and Mrs. Hazen lived in an "elegant two-story concrete block dwelling" on 1,905 acres with their son and two daughters. The farm had milk cows, mostly Jerseys, numbering about 150, of which 40 were currently being milked. They also had pigs, chickens, and horses. An orchard, garden, and strawberry patch were also located on the farm. The article claimed that Hazen was "rapidly transforming [the plantation] into one of the most substantial and admired farm properties in the county." He was eager to adapt himself and his work to local conditions, so he was "working with the county agent, receiving numerous bulletins, many farm papers and magazines, and acting upon some of the most practical suggestions which come to him from these sources from time to time" (N.A., SW, 1925, 26 March:5).

Smith's Weekly provided an update on the Hazen property over a year later. It was noted in the newspaper piece that after owning the farm for two years, M.D. Hazen and his son Roger had taken the "deserted . . . uninhabitable" farm and turned its 2,000 acres into "a million dollar proposition." Although known as a dairy farm with "good, natural pasture," 1,000 acres of the farm were in cultivation, 400 of which were in corn and "velvet beans" for livestock feed. Mr. Hazen was known for his Poland China Hogs and horse breeding, while Mrs. Hazen was raising "a fine flock of pure-bred Ancona chickens." The farm had 125 dairy cattle, about half of which were Jerseys. The article mentions that Hazen catered to the wholesale trade but would sell milk by the gallon to individuals. The article was full of praise for this agricultural enterprise and noted, "Efficient management, keen business judgment coupled with yankee grit to do and conquer has wrought a miracle with New Hope Plantation and what formerly was a run down, dilapidated and almost entirely deserted country place is now a well-kept, beautiful plantation home, run on business principles and made to pay" (N.A., SW, 1926, 29 October:6).

"New Hope Plantations" was mentioned in a number of advertisements for the dairy farm, as well as the Leon County Milk Company, from late 1926 into mid-1927. The use of "New Hope Plantations," plural, seems to suggest that Hazen's two tracts, totaling almost 2,000 acres, were seen as more than one New Hope plantation. In June 1927, M.D. Hazen is listed as a "Leon County Dairy Farmer" from New Hope Plantation in a Charles Lindburgh-themed ad for the Leon County Milk Company, "Manufacturers of Leon County Butter—Leon County Ice Cream" (Figure 6). (N.A., TD, 1926, 4 December:4; N.A., TD, 1926, 10 December:10; N.A., TD, 1927, 1 January:6; N.A., TD, 1927, 18 June:6).

Things were apparently not going well for the New Hope Dairy Plantation, however, regardless of glowing newspaper reports or enthusiastic advertisements. Roger N. Hazen left the farm and got a job with the *Tallahassee Daily Democrat* and *Florida Morning State* newspapers during the summer of 1927 as their "exclusive traveling representative." It appears that they were unable to make the mortgage payments on New Hope Dairy Plantation, because this property was returned to Lyman Bradley on September 14, 1927, in a transaction recorded in Deed Book 17, pages 256-258. M.D. Hazen moved on to the citrus industry in Loughman, Florida. He is mentioned in a November 1927 newspaper article as the "former owner of the New Hope plantations." He had grove properties in Polk County and reported bumper crops of oranges, grapefruits, and tangerines (N.A., Tallahassee Daily Democrat [TDD], 1927, 19 August:1; N.A., Florida Morning State [FMS], 1927, 26 November:1).

Any further dairy farming at New Hope Plantation came to an abrupt end in the summer of 1928. At that time newspaper notices began appearing for an impending foreclosure sale of personal property to pay on two of the Hazen's mortgages. The following was offered for sale at New Hope Plantation "at public outcry, to the highest ad best bidder for cash:" 12 Jersey cows, 43 Grade 78Jersey cows, two Jersey bulls, 14 yearling heifers, two yearling bulls, two yearling steers, 23 Jersey and Grade Jersey calves, one Jersey bull calf, all offspring of said cows from 1926 and 1927, four Percheron draft horses, three light type horses (one colt, one filly, and one mare), a Fordson tractor with tractor implements, wagons, cultivators, various plows, and other farming implements (N.A., TD, 1928, 4 August:7).

MAN--

is the only adult animal that uses milk as a food, yet it is one of the most staple and at the same time one of the most healthful and necessary articles of mankind's diet. More reason, therefore, why you should insist at all times on purety, wholesomeness and quality of product from peaceful, healthy, contented cows.

WE HAVE invested over $200,000 to see that Tallahassee gets a pure milk product. Our plant is managed so that you may be assured of this.

WHILE our business is primarily a wholesale enterprise, we dispense whole sweet milk to customers in this city who require one gallon or more per day, at 50 cents per gallon. We solicit your patronage on this basis.

NEW HOPE PLANTATIONS

"Tallahassee's Largest Milk Supply."

Figure 4. Advertisement for "New Hope Plantations," "Tallahassee's Largest Milk Supply" (Tallahassee Democrat, December 10, 1926).

Figure 5. Advertisement for New Hope Plantation Dairy Service identifies M.D. Hazen as proprietor (Tallahassee Democrat, January 1, 1927).

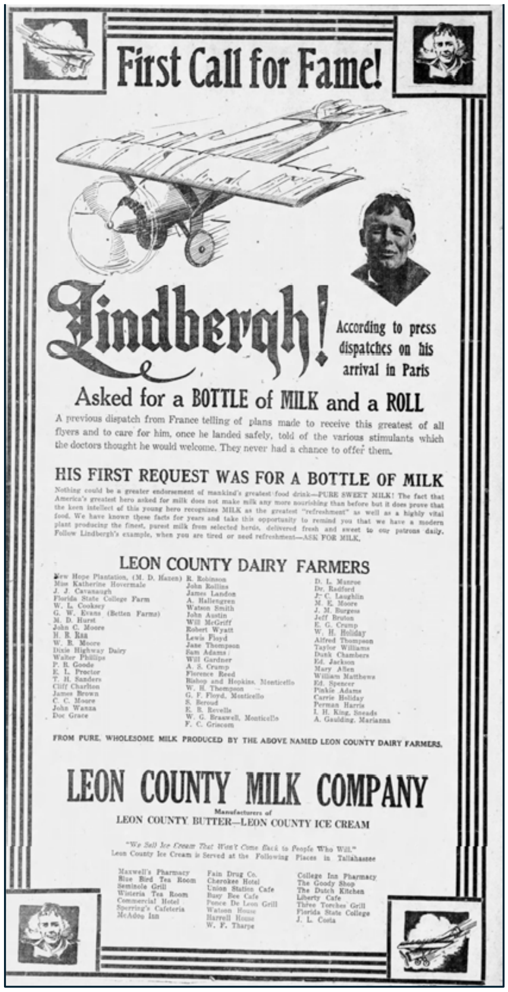

Figure 6. Leon County Milk Company Advertisement (Tallahassee Democrat, June 18, 1927).

Despite its commercial failure, New Hope Dairy Farm was an important part of the dairy economy of Tallahassee and Leon County for almost a decade. During antebellum times, dairying was a small part of the agricultural economy of Leon County. It began to grow, however, in the last two decades of the nineteenth century, and the county eventually led the state in milk production. Before the outbreak of World War II, there were around 25 dairy farms producing about 745,000 gallons a year in the county. In the postwar boom, however, dairy farms suffered economically as land values rose in the Tallahassee area. Also, local environmental conditions adversely affected cows and, therefore, the price competitiveness of Florida dairy products: the climate was much hotter than other parts of the country, and the low nutrients in local grasses dictated the need for dietary supplements. Consequently, there was only one dairy farm left in the county by 1968. The fate of the dairy industry reflects, overall, the transformation of the area's economy since the Civil War and, especially, since World War II. Soaring prices made agricultural use impractical for the land surrounding a growing Tallahassee (Paisely 1968). The Tallahassee economy is no longer dominated by agriculture but by the businesses of state government and education.

Udo Fleischmann and Welaunee Hunting Plantation

The tract of land that C.E. Bradley originally purchased for his winter home was sold to Udo M. Fleischmann and Jeanne K. Fleischman on March 29, 1929. The transaction consisted of the exact acreage, 984.76 acres, originally conveyed from Eliza Thompson Williams to Charles E. Bradley in 1884. The 1929 deed referred to the property as "New Hope Plantation" and noted Lyman and Katherine had previously taken out a mortgage on this property March 26, 1918. On April 11, 1929, the Bradleys also sold the Fleischmanns Section 13, Section 24, and the north half of Section 23 of Township 1 North, Range 1 East lying south of State Road 1 right-of-way, containing 563.76 acres. This deed included a recently built tenant house located near the state road and stipulated that the Bradleys would continue making advancements to and getting rents from tenants to the end of 1929 (LCC 1929: DB 20:264-267).

The purchase of New Hope Plantation was just one acquisition of many for the Fleischmanns. They had already purchased numerous tracts in the vicinity of New Hope for their estate, which was a hunting plantation they named "Welaunee," which means "muddy water" in the Creek language. Udo Maximillian Fleischmann was a well-known person in Tallahassee. As early as 1909, the New York banker and nephew of Charles Fleischmann, founder of the Fleischmann yeast empire, had leased hunting rights from several small farmers in the area (Brueckheimer 1988). The Fleischmanns' intent was to use the land for vacationing during the 1910 hunting season (Paisley 1981).

In 1912 the Fleischmanns began purchasing land instead of leasing it. Welaunee Plantation included tracts once part of the La Grange Plantation, owned by Joseph John Williams; the Whitaker Plantation, owned by Eli Whitaker; the James Kirksey Plantation; Clifford Hill Plantation, owned by the Gamble Family; Rachel W. Cohen's 1,600 acres; and Hickory Hill Plantation owned by Charles E. Emery (Brueckheimer 1988).

The appearance and eventual predominance of hunting plantations in Leon County in the first half of the twentieth century was a result of the evolution, or, rather, lack of evolution of agriculture in the area following the Civil War. In the late 1880s and early 1900s farms attempted to turn from the popular, antebellum crops of corn and cotton and seek new and more lucrative cash crops, such as pecans, pears, and tobacco. (Bauer 2005:9). As previously mentioned, C.E. Bradley's New Hope Plantation explored the production of cassava, oats, rye, and tobacco, and his son, Lyman, attempted to turn it into a successful dairy farm. The decline in profitability of agriculture gave rise to the advent of hunting plantations. Like many of the farms in Leon County, New Hope ended up as a small part of a large hunting plantation. Portions of the old plantations, however, were still devoted to tenant farms producing the traditional crops of corn and cotton.

The story of hunting plantations in Tallahassee begins in the 1880s in Thomasville, Georgia, about 30 miles north of Tallahassee. That town developed a reputation as a sportsman's winter paradise, due to its pleasant climate and plentiful quantity of game birds. The area around Thomasville, south Georgia and north Florida, began attracting affluent northerners who first leased and then began purchasing small tracts of farms and forests. Some of them began cobbling their tracts together into huge hunting plantations consisting of thousands of acres – much larger than some of the original, antebellum cotton plantations of the region. By 1910 there were seven hunting plantations on 18,898 acres in Leon County. The number more than doubled to 15 on 81,004 of Leon County's 426,752 acres by 1930 (Hamburger 1996:2). By 1950, there were 20 plantations covering nearly 107,000 acres.

The cultural and physical landscape of a hunting plantation was similar to an antebellum, agricultural plantation, but usually on a larger scale. There were residential buildings for the landowners, workers, and tenants; stables and kennels for horses and dogs; and other support buildings for storage and maintenance of farming and hunting equipment. Hunting trails, wide enough for hunting wagons, wound throughout the plantation.

These part-time residents had a profound effect on the economy and ecology of northern Leon County with their hunting plantations. To help conserve the dwindling quail population, Udo Fleischmann and others funded and supported Herbert L. Stoddard's work in the Cooperative Quail Investigation and the Cooperative Quail Study Association. Quail require a habitat and food sources that are gradually destroyed by natural field and forest growth. Therefore, Stoddard sought to preserve an optimal habitat, in which the quail population would flourish, by stopping the net growth of vegetation through selective, controlled burning. Small plots, separated by fire lanes, would be burned at night between mid-February and the end of March on the hunting plantations. (Hamburger 1996:3).

Because of the need for controlled burns, tenant farmers could no longer grow large fields of cotton for cash. Owners required more primitive farming techniques so the quail would not be disturbed (Brueckheimer 1988). Cotton production was discouraged, because it depleted the soil, while corn was encouraged. Some plantations prohibited fences, so livestock could not be kept. Tenant farmers were restricted to small, scattered patches located throughout the hunting plantation, which, consequently, resulted in fewer tenant farmers on each property. These policies resulted in a sharp decline in tenant farming in Leon County throughout the first half of the twentieth century. Leon County had 1,775 tenant farms in 1900 and only 360 in 1950. Black tenant farmers were affected most because they constituted 90 percent of tenant farmers. Between 85 and 90 percent of them lived and farmed on hunting plantations (Hamburger 1996:3). By the 1950s, this farming system was no longer profitable for the tenant or landowner. It is believed that a large increase in state highway construction, which created construction jobs that afforded agricultural workers a better salary, contributed greatly to the demise of tenant farming (Paisley 1968).

Hunting plantation owners were not concerned by the lack of agricultural production on their land – their main concern was the propagation of the quail population, which was not helped by large cotton or corn fields. Tenants often had dual roles, therefore, to subsist on their severely restricted farming activities. During the hunting season, northern plantation owners might pay them to work as gardeners, housekeepers, cooks, laundresses, wagon drivers, dog handlers, or stable hands. In the off-season, tenant farmers, in addition to planting and harvesting their crops, might help with maintenance: mow lawns, trim shrubs, clear away storm debris, repair fences and barns, and harrow firebreaks in preparation for the annual burning.

Fleischmann was very wealthy and had the resources to create an enormous hunting plantation. During his banking career he served as president of the Land Brokerage Company of New York, director and executive committee member of Pennick and Ford, and director and vice president of the New Netherland Bank, which eventually merged with Chase National Bank. He had a great passion for quail hunting and bird dogs and was "well known in the field trial world." Fleischmann served as president of the Continental Field Trial Club and the exclusive Georgia-Florida Field Trials, and he was one of the founders of the English Setter Club of Medford, New Jersey. His dogs were award winners (N.A., TD, 1936, 17 February:5; N.A., TD, 1952, 3 March:1).

Figure 7. Luvenia and Ed Austin, sharecroppers on the Welaunee Plantation, ca. 1940. (State Archives of Florida, Florida Memory).

Figure 8. Pauline Brim and Cleotha Willis grew up on Welaunee Plantation on Miccosukee Road. (State Archives of Florida, Florida Memory).

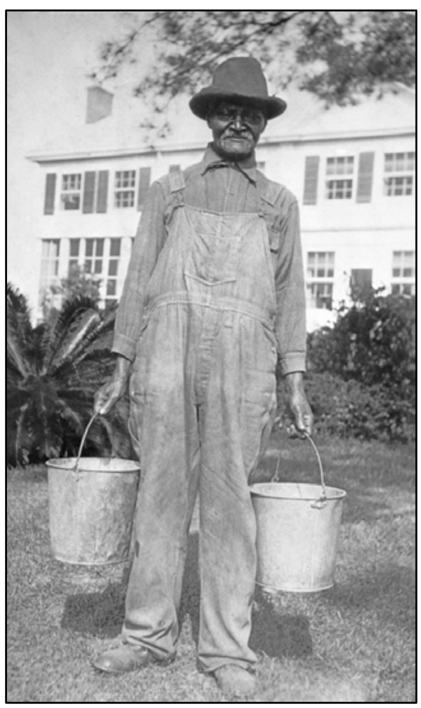

Figure 9. Worker at Welaunee Plantation, ca. 1924 (State Archives of Florida, Florida Memory).

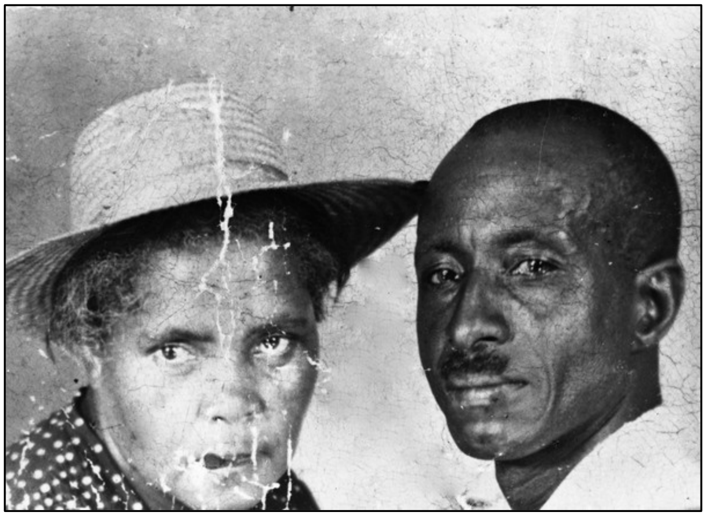

Figure 10. Mary and Essex Barnes, ca.1929, married, lived, and raised their family on Welaunee Plantation (State Archives of Florida, Florida Memory).

Figure 11. Hunting wagon on Welaunee Plantation, 1929 (State Archives of Florida, Florida Memory).

Figure 12. Picnic lunch break during hunt at Welaunee Plantation. Two African American servants are standing in center background (State Archives of Florida, Florida Memory).

In 1918, at the end of the mile-long driveway off Centerville Road, Fleischmann built a one-story, three-bay house which, over time, gradually expanded to a much larger two-story Colonial Revival residence (Figure 13). Other features and structures associated with the house include an elaborate garden, dog kennels, dairy barns, horse stables, and machine sheds. According to forms completed in 1986 for the National Register of Historic Places, there are three concrete-block workers' houses near the main entrance.

At its largest, Welaunee Plantation covered 16,594 acres in Leon County (Paisley 1981). Many tenant farmers, from plantations such as Hickory Hill and LaGrange, stayed to live and work for the Fleischmanns, as the land upon which they farmed was absorbed into the hunting plantation (Chandler 2022:21). Born into slavery on LaGrange in 1851, Richard Robinson remained on the plantation following emancipation. Records indicate he opened a bank account with the Freedman's Bureau in 1868 as a resident farmer on the plantation of Joseph John Williams. (Chandler 2022). At the end of World War II, about 60 tenant farmers lived on Welaunee, but by the early 1950s none remained. (Chandler 2022).

In 1947, the Fleischmanns sold some of Welaunee Plantation for a residential subdivision, Hickory Hills Farm. Ironically, African Americans, some of whom might have been descendants of those enslaved people who toiled on the original Hickory Hill Plantation, were legally prevented from living in the development. Property deeds stipulated, among other requirements, that all residents must be

Figure 13. Welaunee Plantation House, ca. 1923 (State Archives of Florida, Florida Memory).

Figure 14. House for servants at Welaunee Plantation, ca. 1923 (State Archives of Florida, Florida Memory).

white: "No person other than the Caucasian race shall own, use, or occupy property in said subdivision, except that this covenant shall not prevent occupancy by domestic servants of a different race or nationality employed by the owner or tenant" (LCC 1946:DB 3:24).

Udo Fleischmann passed away on March 1, 1952. According to his obituary, he had “resided at Welaunee continuously for the past few years and previously had lived there part-time for about 35 years. He was one of Leon County’s largest property owners” (N.A., TD, 1952, 3 March:1). With Udo’s death, his wife Jeanne became the sole owner of Welaunee Plantation (Paisley 1981). Shortly after his death, Mrs. Fleischmann began selling large portions of the plantation, some of which were for residential developments, such as, most notably, Killearn Estates. In a short time, the size of Welaunee was reduced from 16,594 acres to about 6,800 acres (Brueckheimer 1988). Some of the land sold included areas occupied by African American churches. As a result of these land sales, New Zion Primitive Baptist Church, for example, which was located at the present-day intersection of Edenfield Road and Highway 90, had to move its congregation to another site. The new location, its present location, was formally donated to the church by Mrs. Fleischmann (Thompson 1997).

The use of Welaunee changed as its boundaries shrank. Land sales reduced it from a vast hunting plantation to a large cattle ranch. When Mrs. Fleischmann died in 1962, her nephew, John W. Mettler, Jr., inherited Welaunee. According to Welaunee’s current owner, Kit Davenport, there were no sharecroppers living on the plantation when the Mettlers inherited the property (Chandler 2022:28). Mettler founded Powerhouse, Inc. in 1962 as a company for managing the estate and cattle ranch. He continued raising Hereford cattle with great success. During its early years of operation, Mettler had about 500 head of cattle (Brueckheimer 1988). These cattle required over 2,000 acres of grazing land with another 300 acres for growing feed. As his livestock numbers grew, Mettler began buying land more land. By 1967 Welaunee's total acreage was back up to 13,400 acres (Brueckheimer 1988).

Through Powerhouse, Mettler transformed Welaunee into a successful commercial hunting reserve. Wealthy hunters could lease portions of the plantation for private hunting during quail season. Because plantation employees raised quail on-site, hunters were almost always guaranteed a successful season (Brueckheimer 1988). Welaunee became an all-inclusive hunting destination by offering its guests "room, board, dog handlers, horses, shooting buggies, and all the necessary paraphernalia of quail hunting" (Brueckheimer 1988:240). When the Mettlers moved to Welaunee in 1966, they ended the commercial quail hunting business. The family decided to focus on cattle raising, which they found more profitable.

The Mettlers continued cattle ranching into the late 1980s. By 1985, the family-owned "800 cows with calves, 200 two-year-old heifers, 185 yearling heifers, and 150 bulls" (Brueckheimer 1988). The ranch operation also included grain elevators (Brueckheimer 1988). Following the death of Mr. Mettler in 1990 and Mrs. Mettler in 1994, their daughter Louise and her husband Kit Davenport inherited Welaunee Plantation (Chandler 2022: 27).

After they inherited Welaunee, Mr. and Mrs. Davenport began donating various tracts of the plantation to government and religious organizations. These transactions were facilitated, in part, by The Trust for Public Land. In 1998, the Davenports donated approximately 500 acres to the State of Florida for the construction of Miccosukee Greenway. Construction began in the early 2000s, and it is now a popular recreational trail. The City of Tallahassee owns approximately 429 acres between I-10 and the greenway. Welaunee Boulevard and Fleischmann Road, throughfares memorializing the hunting plantation and its founder, now crisscross the area, intersecting north of Miccosukee Road and west of the old boundaries of the New Hope Plantation. The Welaunee Plantation north of I-10 now consists of pasture, pine plantation, and some row crops. Most of the plantation in the vicinity of Testerina Church, south of I-10 and north of Miccosukee Road, consists of heavily wooded, second-growth mixed hardwoods, and planted pines. The area south of Miccosukee Road consists of residential subdivisions.

The New Hope Community

As mentioned in the introduction of this report, what is now popularly referred to as the "New Hope Community" might be considered the people who lived and institutions that developed in and around the 984.76-acre tract of land that was the antebellum cotton plantation of Joseph John Williams known as "New Hope." This is the same tract of land, identified as New Hope Plantation in deed records, that was later operated as a farm by C.E. Bradley and as a diary by his son, Lyman Bradley. In the mid- to late 1920s, M.D. Hazen and his son, Roger, were proprietors of a large dairy operation that combined New Hope and another large tract of land into the ca. 2,000-acre New Hope Plantations. Eventually, New Hope would be absorbed into the Welaunee hunting plantation by Udo Fleischmann in 1929. For the next four decades, the New Hope tract served as part of a recreational destination for quail hunters and as a home for sharecroppers who also helped maintain and operate Welaunee.

Extensive database research was conducted, but no historical references to a "New Hope Community" in Leon County, Florida, could be found. The only tangible, physical remains of New Hope Community appear to be the Testerina Primitive Baptist Church and the New Hope/Testerina Cemetery, which has been located and recorded behind the church. They are located directly south of the New Hope Plantation site.

Testerina Primitive Baptist Church

According to the "Historical Sketch," found in the commemorative booklet, *Testerina Primitive Baptist Church Centennial Celebration July 21-25*, the first pastor of Testerina was Moses Vaughn, who was an "Ex-Slave" chosen by the congregation to lead them. He may be the same Moses who appears on Noah Thompson's estate records for New Hope Plantation, which was northeast of the church's present-day location. The 1870 Census for Leon County lists 41-year-old Moses Vaughn as a "Farm Labourer" and his wife, Hannah, 35, as "Keeping House." Betty and Moses, their oldest children, 16 and 13 years old, respectively, are both listed as "Farm Labourer." Hannah and Moses (senior) were born in North Carolina, while Betty, Moses (junior), and the other five children were born in Florida. The census also records the Vaughns' neighbors, Alfred (22) and Ann (19) Austin and baby Allice (3 months), who became members of Testerina Primitive Baptist Church (FamilySearch, image 444 of 877; United States. National Archives and Records Administration. Image Group Number: 004263357).

Selected and ordained as deacons under Elder Moses Vaughn were Burden Clack, Henry Wilken, and Alfred Austin. Trustees included Caleb Hawkins, John Davis, and Malachi Barnes, Sr. The land upon which the church now sits was acquired by the congregation in 1884, according to the "Historical Sketch," at which time a wooden sanctuary was built. 1884 was the same year C.E. Bradley purchased New Hope Plantation, located north of the church. Following the death of Elder Vaughn in 1890, Elder Henry Johnson became pastor. Rev. Johnson served until his death in 1932, and during his tenure "he baptized and received more members in the church than any minister of his time." He also oversaw the physical growth of the church, which was enlarged with several additions. Elder Clifford T. Hillyard of Wakulla County served

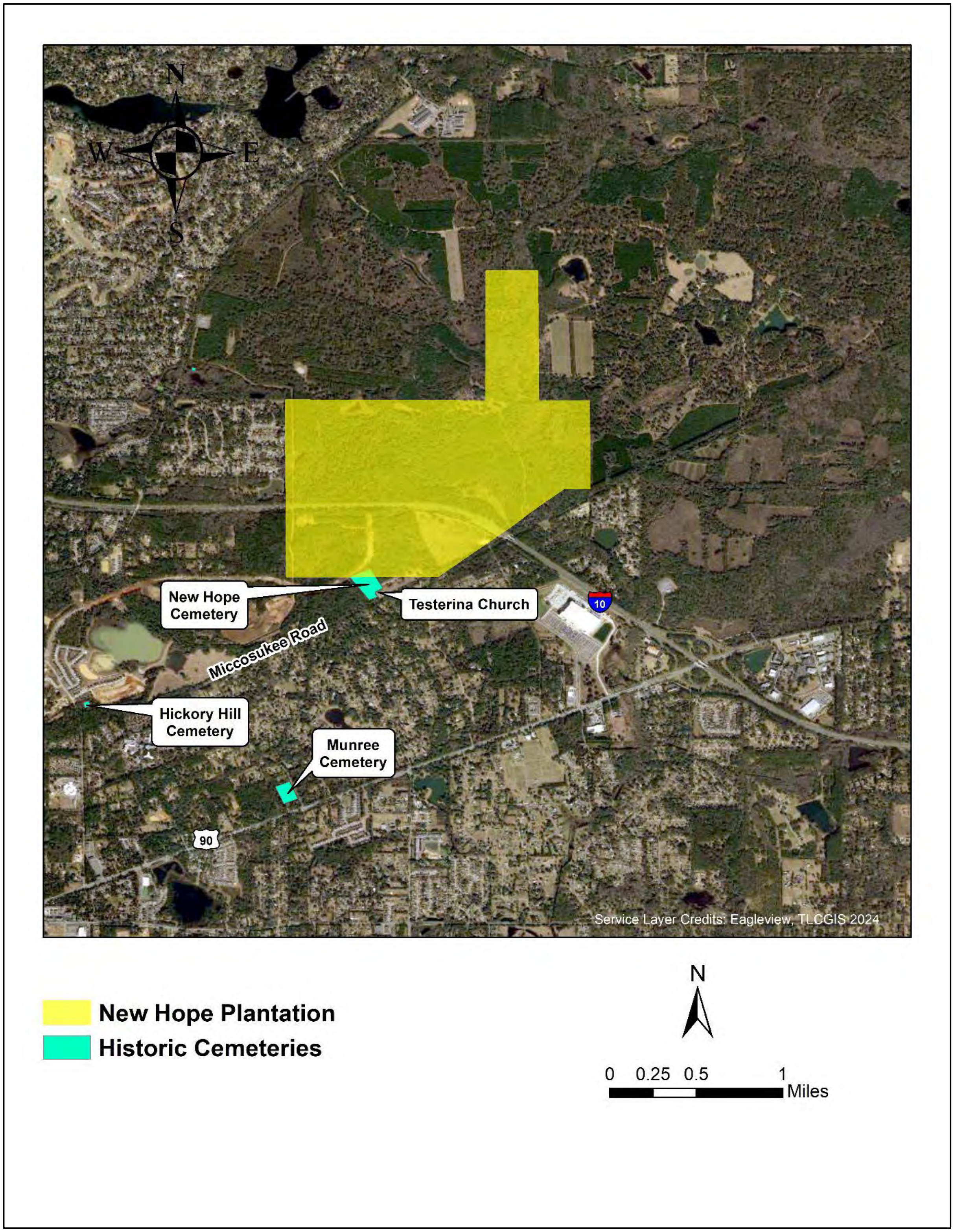

Figure 15. Historic cemeteries in the vicinity of New Hope Plantation (2024).

as pastor from 1933 to 48. He organized the first usher board under his pastorate in 1943. A tragic fire completely destroyed the church in 1942, but it was rebuilt in 1943.

Rev. Gus W. Hill (1911-1992) served as pastor from 1949 to 1957. He made music an important part of the church's ministry by establishing the first two choirs of the congregation, Junior and Senior. Several additions were made to the building, including the choir stand and the choir room. The church obtained clear title of the deed at this time. According to the "Historical Sketch," Rev. Culbert W. Williams succeeded Rev. Hill, serving 1957-63. During Rev. Williams' tenure, the present sanctuary was built, and a cafeteria was added. Following Rev. William, Rev. Hill returned as pastor of Testerina and served there for almost 30 years, until he passed away August 7, 1992.

Rev. Hill's obituary notes that he was in the ministry for over 50 years. He was a descendant of Alfred Austin, who was a neighbor of Rev. Vaughn and one of the founders and first deacons of the "1871 Bush Arbor Congregation," which became Testerina Primitive Baptist Church. Rev. Hill's pastorships included Leon, Gadsden, Wakulla, and Palm Beach Counties. He was active as a leader in the Primitive Baptist Association at the local, state, and national levels. An article in the *Tallahassee Democrat* on leadership in Tallahassee's Black churches during the Civil Rights Era identified Rev. Hill as a minister of one of the rural churches in Leon County who preached "the need to become involved in the movement and the rights of members to register and vote" (N.A., TD, 2014, 30 January). In 2024, as Tallahassee celebrated its bicentennial, the Florida Civil Rights Museum highlighted their "List of the 200 Most Influential African-American Leon Countians of the Last Two Centuries." Rev. Hill was on the list because of the vital part he played in the establishment of Miracle Hill Nursing and Convalescent Home. (N.A., TD, 2024, 29 February:A3).

The Rev. Larry Austin was installed as the pastor of Testerina Primitive Baptist Church on September 25, 1994. A Tallahassee native and Florida State Trooper, Rev. Austin was ordained an elder and served as pastor of Swain Bethel Primitive Baptist Church 1990-92. He was officially installed as pastor-in-charge on January 19, 1992. Clinton Smith of Testerina served as the moderator. He returned to Testerina later in 1992 to assist Rev. Hill, who was selected to be Testerina pastor in April 1994. The installation included a Sunday morning service with the Rev. Ronald Rackley and the St. Peter Male Chorus, an afternoon service with the Rev. Matthew Rogers and the St. Stevens Primitive Baptist Church of Gretna, and an evening musical concert led by Jason Wiggins and the church's youth department (N.A., TD, 1992, 18 January:45; N.A., TD, 1994, 24 September:21)

Adding additional insight into the church's early history and physical development is a Works Progress Administration (WPA) Church Inventory Form that was completed for Testerina Church on April 4, 1938. According to the four-page survey, taken by Mary Lucile Cook, the church was organized in 1871, and Moses Vaughn was the first pastor of the church, whose dates of tenure were 1871-79. A description of the church sanctuary indicates that it was erected in 1910 and was a "plain, rectangular, wooden structure; painted white" with "a bell in small steeple on front." According to the interview, the present clergyman was J. C. Hilliard, who had begun his tenure in 1935. Assisting with the completion of the form was Joseph Austin, who was a deacon (Works

Progress Administration, Historical Records Survey. Testerina Baptist Church. 1871. State Archives of Florida, *Florida Memory*).

A deed executed April 23, 1956, conveyed the 1.1-acre property upon which the church sits, from Jeanne K. Fleischmann to Charlie Austin, Ed Austin, Jr., and Ivory D. Vaughn "in fee simple forever, for the use, benefit and behoof of the Testerina Primitive Baptist Church . . ." for and in consideration of 10.00 (LCC 1956:DB 203:63).

Leon County Property Appraiser records show that the most recent sanctuary was built in 1960. A set of photos from the Florida Folklife Program indicates that the current brick sanctuary was erected in 1961. Congregants believe there is a time capsule located in the cornerstone of the present church. Figure 16 is a photo of the church, believed to be from the early 1950s, as a wood-frame weatherboard-clad building. A notice in the *Tallahassee Democrat* on Saturday, May 11, 1968, mentioned a "first anniversary celebration" at the church. The subject of the event was not mentioned, but it may have been a church renovation. A candlelight service was held the following Thursday night, and then, on Sunday, the Rev. Leroy Thompson spoke at a special observance, which was followed by "sacred music" and refreshments (N.A., TD, 1968, 11 May:5).

Figure 16. Testerina Primitive Baptist Church, early 1950s.

Whether worshipping in an arbor, in a simple weatherboard-sided church, or in a brick sanctuary with stained-glass windows, the members of Testerina Primitive Baptist Church have been a blessing to the Tallahassee community through the sharing of their spiritual gifts. They would never boast of their good works, but by perusing the local newspapers one may read about their service to the community, their fellowship with other Christians, and their commitment to God. From 1949 to present, the newspaper record of Testerina shows a congregation involved in celebrations, special events, and their musical ministry.

As mentioned earlier, Rev. Hill started the church's first two choirs after he first became pastor of Testerina. The choirs of Testerina have had a rich tradition of providing inspiration through their spirituality for the past 75 years. Church announcements for activities and events at Testerina span several decades in the *Tallahassee Democrat* newspaper. Musical performances are frequently found in the digitized versions of the newspaper, as found online.

The Men's Chorus celebrated their first anniversary on Saturday, April 27, 1963, with an evening concert at the church. The Rev. Jeremiah Gee delivered their anniversary sermon the following day. They sponsored a musical concert at the church on Sunday evening, February 7, 1965. The next year another newspaper notice announced a special guest speaker, Rev. Ernest Ferrell, at Testerina, for whom the Men's Choir provided accompaniment. The Rev. Ferrell was widely known in the area as a dynamic, inspiring Gospel preacher. He was a Lincoln High School graduate of 1962 and had been recently called to the ministry. He was a member of Testerina who made visits to churches in Tallahassee and throughout the state. He was also a member of a local group called The Walls of Zion. Proceeds from free-will offerings made during his visit to Testerina on November 7, 1965, benefited the church Usher Board (N.A., TD, 1963, 27 April:1; N.A., TD, 1965, 6 February:2; N.A., TD, 1965, 6 November:2; N.A., TD, 1966, 5 March:3).

On September 3, 1967, the church hosted a Gospel Music Concert, sponsored by Choir No. 2, that featured music from 20 choirs and gospel singing groups – there was no admission, and door prizes were given away. Choir No. 1 sponsored a musical program at the church on Sunday, October 6, 1968. Testerina hosted a combined choir performance with special vocalists on Sunday, June 28, 1970. Testerina choir members performed in a large benefit for Funders, Inc., which helped children in need, on May 2, 1971, at Doak Campbell Stadium. They were part of Florida A&M University's 200-voice Community Choir, which had choir members from three denominations in Leon and Gadsden County. On Sunday, April 2, 1972, Choir No. 1 celebrated their 22nd anniversary by performing during the 11 a.m. service. During the afternoon "gospel sing," the Male Choir, the three numbered choirs of Testerina, and the Interdenominational Choir of Tallahassee performed. Testerina's Choir No. 2 hosted the featured singer, Frances Hicks of Pensacola, at the annual gospel festival on Sunday, September 3, 1972. The General Messengers of Thomasville, Georgia, also performed. The East Hill Interdenominational Choir Union was held Sunday, March 27, 1977, at Testerina (N.A., TD, 1967, 26 August; N.A., TD, 1968, 5 October; N.A., TD, 1970, 27 June:16; N.A., TD, 1971, 29 April:17; N.A., TD, 1972, 1 April:7; N.A., TD, 1972, 2 September:6; N.A., TD, 1977, 27 March:6).

At Testerina's 106th anniversary celebration, Sunday, July 24, 1977, the focus was on the children. The Sunday School Hour featured a "Mini Children's Extravaganza," and in the afternoon the "100 Voice Children's Choir" sang and performed a skit, "All of God's Children." The Rev. Joseph Hargrett of Orlando was the guest minister. Testerina Choir No. 1 sang at the Munree Pallbearer Lodge anniversary celebration at Testerina Church on April 21, 1991. On Sunday November 1, 1992, Testerina Choir No. 3 participated in the youth group anniversary at Mount Pleasant Primitive Baptist Church. Revival '94 Gospel Explosion was sponsored by East Spring Primitive Baptist Church in July 1994, and Testerina was one of the Primitive Baptist churches that hosted an evening in the five-day series (N.A., TD, 1977, 23 July:18; N.A., TD, 1991, 20 April; N.A., TD, 1992, 31 October:16; N.A., TD, 1994, 16 July).

Over the decades, the reputation of Testerina's musical ministry became highly respected. In 2007 the State Archives of Florida released a recording of Black gospel music entitled "Shall We Gather at the River" in honor of Black History Month. Among the groups featured is one of the choirs from Testerina Primitive Baptist Church.

Because the Church was intertwined throughout Tallahassee's religious community, it was not unusual for the clergy of Testerina to visit, preach, and participate in services or other activities at other churches or for other preachers and churches to visit Testerina. On Sunday, February 18, 1968, Testerina held one of its annual Fellowship Services with the Rev. W.M. Sutton and his Friendship Missionary Baptist Church of Panama City, Florida. Rev. Sutton returned with church members in February 1972 to celebrate Homecoming with Testerina. Usher Board No. 2 sponsored an evening gospel concert featuring Jacobs Chapel No. 2 and Testerina No. 2 choirs on Sunday, February 20. When Bethel AME held their Homecoming in November 1976, one of their events was a Wednesday night service on November 24 at Testerina. St. Mary's Primitive Baptist Church No. 2 celebrated the 6th anniversary of its Young Adult Choir at the 11am service on October 7, 1984. Rev. Larry Austin visited as guest speaker, and Testerina Choir No. 1 sang during the service. When Mount Zion Primitive Baptist Church at Dawkins Pond held an appreciation service for Elder Robert Gaines on May 20, 1990, the Rev. G.W. Hill was the guest minister. On February 15, 1995, Testerina Church and Rev. Austin hosted one of the several pre-installation services for Elder F.R. Rush of New Zion Primitive Baptist Church. Rev. Austin served as guest speaker at the 5th Annual Inspirational Choir Fellowship service, which was held at St. Mary's Church on July 28, 1996. At Testerina's Homecoming 2003, Rev. Youmans brought the Panama City church back to Tallahassee for church services on Miccosukee Road, February 23. For Easter 2005, the three Primitive Baptist Church neighbors, New Zion, Mount Olive, and Testerina had a combined morning service and Easter egg hunt hosted by New Zion on March 20. New Zion and Testerina had a combined Vacation Bible School July 30-August 3, 2007, at New Zion (N.A., TD, 1968, 17 February:5; N.A., TD, 1972, 19 February:8; N.A., TD, 1976, 20 November:10; N.A., TD, 1984, 6 October:8; N.A., TD, 1995, 4 February:12; N.A., TD, 1996, 27 July:24; N.A., TD, 2003, 22 February:28; N.A., TD, 2005, 19 March:30; N.A., TD, 2007, 12 May:34).

Testerina hosted many events, organizations, and churches in its building over the years. The 87th annual meeting of the Old West Florida Zion Orthodox Primitive Baptist Association met at Testerina October 16-21, 1956. Various community organizations participated, and the keynote address was delivered by J.W. Anderson. Testerina's Pastor's Aid Club presented "Youth in Action" on Sunday, April 16, 1972. Dorothy Richardson spoke at the 2 p.m. service to the youth of Testerina, and the Tallahassee Community Youth Gospel Choir performed. Also scheduled was a contest, "All in the Clubs Family." The Old West Florida Sunday School Convention was held at Testerina June 13-18, 1972. The pre-opening session featured a "Mystery Music Extravaganza," with performances from the choir of the convention as well as Gasdonian's 100 Voices of Quincy. The guest choir was directed by Mrs. Betty Keaton. James Eaton, professor at Florida A&M University, was the keynote speaker at the Youth Congress Black History Program, which was held during the Old West Florida Association Church School Convention on February 1, 1992. The Old West Florida District Matrons had their annual Thanksgiving Program at the church, with Rev. Larry Austin speaking and the St. Rosa Primitive Baptist Church Male Chorus singing, on Christmas Eve 1994. Testerina held a family workshop entitled "Making Your House a Home . . . God's Way," on Saturday, February 5, 2000. In September 2003, the church served as one of the hosts for the city-wide recruitment campaign of the Urban League. "I want to encourage all of our members and friends to join me by taking out a membership in this outstanding service organization." (N.A., TD, 1956, 22 September:1; N. A., TD, 1972, 15 April:6; N.A., TD, 1972, 10 June:6; N.A., TD, 1992, 1 February:44; N.A., TD, 1994, 24 December:14; N. A., TD, 2000, 5 February:23; N.A., TD, 2003, 26 September:133).

Another way the congregation worshiped at Testerina was Dual Day, which was held the last Sunday in July. Guests would speak in the morning and afternoon services. It was first held in 1972. On Sunday, July 29, 1973, a parade was held between services, depicting women of the Bible, with Bessie Wells narrating. In 1974, Mrs. W.M. Miles spoke at the morning service while the Rev. Ira Hinson of Bethel Baptist Church preached in the afternoon. The 1980 celebration featured Johnnie B. Taylor, an instructor at Gilchrist Elementary School, speaking in the morning and Elder J. Feagin in the afternoon (N.A., TD, 1973, 28 July:7; N.A., TD, 1974, 27 July:8; N.A., TD, 1980, 26 July:15).

Only two wedding notices for Testerina Primitive Baptist Church were found in the *Tallahassee Democrat.* These occurred in 1978 and 1999. The Gaskins-Denefield wedding was on February 11, 1978. Beverly Ann Gaskins was a graduate of Godby High School and a student at the Lively Vocational Technical School, pursuing a nursing degree. James Edward Denefield was also a graduate of Godby High School. He was attending the DeVry Technology Institute in Atlanta. Rev. G.W. Hill was the officiant. A July 17, 1999, wedding was planned for Sabrina Carmita Leon to Walter Carlyle Davis. She was a 1990 graduate of Lincoln High School and an employee of Hewitt Associates LLC. He was a 1988 graduate of Hampton (Virginia) High School. He received a bachelor's degree in computer science from Norfolk State University and was an employee of Oracle Corporation (N.A., TD, 1978, 5 February:64; N.A., TD, 1999, 4 July).

In later years, the church became involved in sports. In the 1989 city youth tournament, Testerina defeated Faith Presbyterian in the intermediate basketball league 67-48. The Testerina Primitive Baptist Church Tournament was held July 17, 1993, at the Florida A&M Softball Complex. (N.A., TD, 1989, 9 March:10; N.A., TD, 1993, 6 July:34).

In 2009 three Primitive Baptists Churches, Testerina, New Zion, and Mount Olive, were deeded the one-acre Hickory Hill Cemetery. The cemetery held 28 marked graves, dating from 1919 to 1947, and several unmarked graves. The churches help maintain the cemetery. The Hickory Hill Community, created after 1865, was a community of Black tenant farmers who lived along Miccosukee Road (N.A., TD, 2009, 21 February:7).

One event for which Testerina Primitive Baptist Church was well-known locally was the commemoration of Freedom Day. Before Juneteenth was written into law as a national holiday on June 17, 2021, the freedom of the nation's enslaved people was celebrated nationally on February 1. This date was officially designated by President Harry Truman on June 30, 1948, and was selected because President Abraham Lincoln signed the 13th Amendment, which abolished slavery, on February 1, 1865. According to newspapers, however, none of the African Americans in the Tallahassee area observed Freedom Day on February 1: they chose May 20. The February 1, 1967, *Tallahassee Democrat* noted that "there isn't much hoopla around Tallahassee for celebration of 'Freedom Day.' They're saving it for May 20." The reason for the May 20 celebration was because on that date, in 1865, Brigadier General Edward M. McCook sent his calvary through the countryside around Tallahassee to notify all those held in bondage that they were free. He even issued his own "emancipation proclamation," which stated,

> "In order to avoid further importunities from citizens of this vicinity, with regards to Negroes, the general commanding announces, for those who seem to be ignorant of the fact, that the President of the United States, on the 1st day of January, 1863, issued a proclamation changing the status of persons held as slaves . . ." (*Floridian and Journal*, 20 May 1865).

Testerina celebrated Freedom Day on May 20 every year with "merry picnics with dinner on the ground," singing, drumbeating, and the "tooting of homemade reed flutes called 'quails.'" It was "a sort of homecoming and jubilee, combined." The 1975 event was attended by hundreds, with some attendees traveling from as far away as Los Angeles, California. After a bountiful dinner, children, teenagers, young adults, and senior citizens marched behind a big bass drum during the traditional parade (N.A., TD, 1967, 1 February:2; N.A., *The Stuart News,* 1967, 5 February; N.A., TD, 1975, 22 May:9).

Another tradition that lasted for many years at Testerina Primitive Baptist Church was Men's Day and Women's Day. Those were days filled with special events, music, and guest speakers. Mary J. Riley, counselor for sophomore women at Florida A&M University, was the guest speaker at Women's Day in 1956. For 1966 Women's Day, the guest superintendent for Sunday School was Mrs. Mable Kelly, the guest speaker for morning services was Mrs. Margaret B. Miller, librarian at Suwannee River Junior College in Madison, and Mrs. Evetta M. Cromer, a former instructor at Florida A&M University, spoke at the afternoon service. The 1967 Men's Day had Daniel Glenn as guest Sunday School attendant. For the morning service, Dr. M.C. Williams was guest speaker, and the New Bethlehem Male Chorus provided music. Jacob Chapel Choir provided the music for the afternoon service, which was led by the Rev. T.L. Jetter and Mt. Zion of Dawkins Pond. A combined Men's and Women's Day occurred Sunday, July 26, 1975. Dr. C.E. Walker, Director of Sponsored Research at Florida A&M University delivered the message, "The Influence of the Christian Family in the Now Generation." Becky Dickey spoke at Women's Day 1998. Men's Day in 2001 was held on July 15 (N.A., TD, 1956, 17 March:1; N.A., TD, 1966, 23 July:2; N.A., TD, 1967, 29 July:1; N.A., TD, 1975, 26 July:6; N.A., TD, 1998, 25 July:23; N.A., TD, 2001, 14 July:28).

The congregation of Testerina consisted of the salt of the earth. There were no limits for them when it came to worshipping and serving God. When it came to education and employment opportunities, however, those who lived under segregation and Jim Crow laws were severely limited. One need only read through decades of newspaper obituaries to learn that sitting in the pews at Testerina were custodians, maids, domestics workers, landscapers, nurse's aides, cooks, food-service workers, and laborers. Deacon Emanuel K. Davis was a maintenance worker at Florida State University for many years. Pleasant Austin, who was born in 1908, was a self-employed woodsman. LeRoy Fredrick Conway, Sr., was foreman leader at the Tallahassee Department of Water & Sewer. Deacon Isaac Yant, Sr., who was born in 1899, was a farmer. Major R. "Buddy Boy" Jefferson retired as the head custodian at Fairview Middle School. Otis B. Wilson and James Wesley Austin were contractors.

Most of the "professionals" or "white collar workers" at Testerina were educators. Johnnie Mae Austin received a bachelor's degree from Florida A&M University, a master's degree from Florida State University, and was a member of Beta Phi Beta sorority. She served as a librarian for over 40 years with the Alachua Public Schools. Susie Harley Germon had a 30-year teaching career in Leon and Bay counties. Mrs. Irene Mills Meeks was a 1965 Florida A&M graduate who taught at Lillian Ruediger Elementary School. She was a member of the Leon County Teachers Association, Florida Teachers Association, and National Teachers Association of Childhood Education. Charlie Mae "Peggy" Fambro majored in library sciences at Florida A&M University, and Savannah Stanley retired as a librarian at Florida A&M University.

Changes resulting from the Civil Rights Movement resulted in many more employment opportunities for the members of Testerina Primitive Baptist Church. Irlies "Chuckie" Jefferson worked at the Florida Highway Patrol Training Academy. David ("Joe Joe" or "Buddy") Barnes was a heating, ventilation, and air conditioning supervisor at Florida A&M University. Phillip Davis, Jr., worked for the Florida Department of Children and Families. Juanita "Marie" Allen Hackley, Lincoln High School Class of 1962, was initially a cosmetologist, following graduation, but she later became a nurse, working at Tallahassee Memorial Hospital for 34 years. Learnon Leon, Sr., 65, Omega Psi Phi, worked in the insurance industry for many years and served in the Leon County Sheriff's Reserve Unit. Antonio Lorenzo Leon was a deputy sheriff with the Leon County Sheriff's Office for 31 years. He was the first African-American Motor Officer and Trainer and was a Recognized Man of Honor by the City of Tallahassee. Deacon Elbert "Buddy" Ferrell, Sr., was a very successful entrepreneur as the owner and master chef at Ferrell's Deli and Catering Service.

Members of Testerina Baptist Church were very involved in church life. They served in a variety of ways. Some belonged to the choirs and participated in the many musical programs. Deacon Daniel Leon, Jr., was president of Choir No. 1 and president of the East Hill Denomination Church Choir Union. Victoria E. "Vicki" Burgess, a 1973 graduate of Lincoln High School, was a talented soloist who performed in many community programs. She was a member of the Sisters of Harmony and Philadelphia Mass Choir. Besides the musical ministry, members could serve on one of the Usher Boards. Testerina had a number of organizations through which its members could serve. As mentioned above, Rev. Hillyard organized the first usher board in 1943 under his pastorate. On March 13, 1983, the church celebrated the 43rd anniversaries of Usher Board No. 1 and Usher Board No. 2. The Rev. Leroy Brown, of Macedonia AME Church in Monticello was the guest speaker while the Miles Gospel Singers provided music. The Mothers Board consisted of ladies with exceptional leadership ability. Some members served in pallbearer lodges, such as the Testerina Pallbearer Lodge, Clifford Hill Pallbearer Lodge, Munree Pallbearer Lodge No. 179, and Indian Branch Pallbearer Lodge. Sister Dosie McGee of Testerina held the position of Ushers Chaplain at the 121st Florida Primitive Baptist Convention. Held at Tallahassee April 18-22, 2022, the event was hosted by the Old West Florida Primitive Baptist Association, which consists of the 39 churches in Leon, Gadsden, Wakulla, and Gulf counties (N.A., TD, 1983, 12 March:9; N.A., TD, 2022, 14 April:E3).

No matter what their background, education, or training was, the members of Testerina have always been very involved in the community. They belonged to a variety of civic and fraternal organizations. Some of the groups that included Testerina members were the H.E. Daniels Chapter No. 132 Order of the Eastern Star, Chaires Masonic Lodge No. 259, Springfield Floral Club, Heroines of Jericho Lodge No. 245, Lady Colston Chapter No. 256 Order of the Eastern Star, Old West Florida Women's Congress, 4H Social Club, Universal Brotherhood No. 444, Elite Women's Club, Sons & Daughters of Israel Lodge, 50 Yardline Club, and Big Bend Football Officials Association. Also counted among the congregation were many military veterans.

Tuskeena School

For over 60 years the Tuskeena School was co-located with Testerina Church on Miccosukee Road. "Tuskeena" is an Otasees name, and the school may be named for Chief Tuskeena, who is mentioned in the *Daily National Intelligencer* newspaper of June 28, 1837, as a native chief who lived in West Florida. The earliest reference to Tuskeena School found in newspapers is in the *Weekly Floridian* of September 19, 1891, in which Mamie McGriff is listed as the teacher for the fall term at Tuskeena. Local newspapers and the Leon County School Board Minutes Ledger provide the names of many of the teachers who taught there over the years. The September 27, 1900, *Weekley Tallahassean* noted that H.T. Robinson was the teacher assigned to Tuskeena School. Mrs. Robinson had a monthly salary of $22.00 in 1901, $20.00 in 1906, $25.00 in 1910, and $25.00 in 1915. The raise in 1910 was because "enrollment and attendance of Tuskeena School has greatly increased since last term." In July 1917, Lottie Wilson was appointed Tuskeena teacher at a salary of $25.00 per month, which was raised to $35.00 in September 1917. At the September 9, 1927, board meeting, J.W.C. Reed was appointed as the teacher at Tuskeena for the 1927-28 school year (N.A., Daily National Intelligencer, 1837, 28 June:2; LCSB, Minutes Ledger 1906-1923:201, 611, 622; LCSB, Minutes Ledger 1923-1931:299).

It was a big struggle for the teachers and families to suitably educate the children who attended Tuskeena. Tuskeena was a small, rural school with very limited resources. One to three teachers taught their students in a one or two room building. The attendees were not affluent: they were the children of sharecroppers, laborers, and domestics. Even the skilled laborers and craftsmen received relatively low wages. Tuskeena existed when schools throughout Leon County and the South were segregated. Although segregation was defended by those who claimed that access to goods and services was "separate but equal," one need only to examine the minutes of the Leon County School Board to see that "separate but equal" was not true. The school budget for the 1931-1932 school year was $88,760.00 for white children and $32,430.00 for Black children. Tuskeena and other "colored" or "Negro" schools in Leon County received less than half of what the white schools received. It is a testament to the fortitude and dedication of the New Hope Community that they were able to educate their children despite the discrimination they faced (LCSB, Minutes Ledger 1923-1931:595).

The school board appointed Robert Gordon, Altamease Edwards, and Lucille Wynn on July 6, 1937, as Tuskeena teachers for 1937-38 school year. Robert Gordon and Beatrice Norwood were appointed Tuskeena teachers for 1938-39 school year. In February 1939 Robert Gordon resigned and was replaced by Amy Jackson, who transferred from Moseley School to Tuskeena. Minutes from the August 6, 1940, board meeting show the teachers for the 1940-1941 school year to be Amy Jackson, Beatrice Norwood, and Lucile Wanza. On September 1, 1942, contracts were

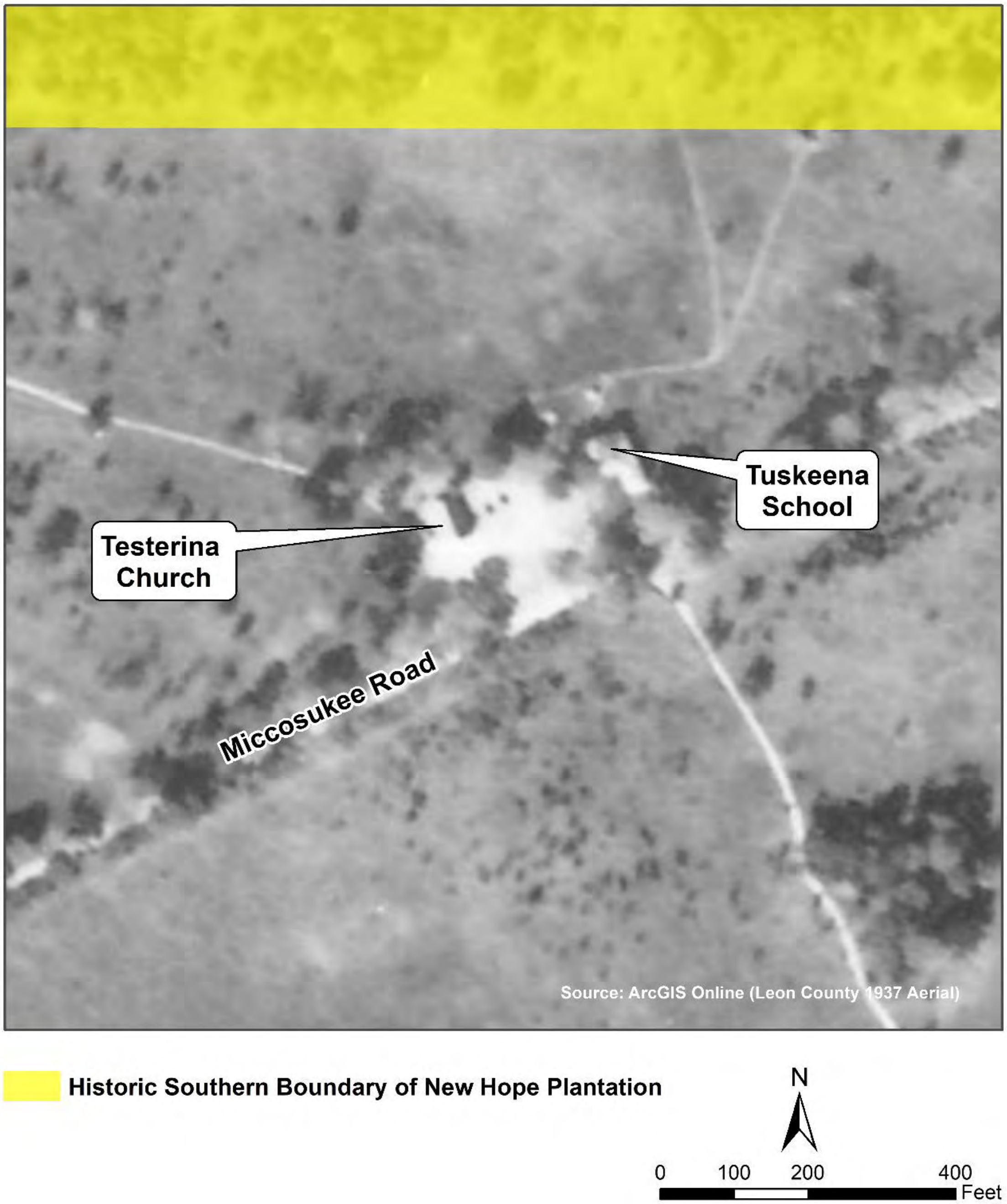

Figure 17. Location of Testerina Primitive Baptist Church and Tuskeena School in 1937. Source: ArcGIS Online.

Figure 18. Tuskeena School at original location adjacent to Testerina Primitive Baptist Church.

renewed for Amy Jackson and Beatrice Norwood at Tuskeena, which by that time had been designated school #59. In May 1947, Marie Adams and Victorine Blake were announced as Tuskeena teachers for the 1947-48 school year (LCSB, Minutes Ledger 1937-1946:86, 217, 250, 312, 376; N.A., WT, 1900, 20 December:8; N.A., WT, 1901, 3 January:4; N.A., WTD, 1906, 18 May:4; N.A., TD, 1915, 14 May:5; N.A., TD, 1947, 11 May:7).

Tuskeena served as a center of the community for not only education, but health, as well. The Leon County Health Unit conducted smallpox examinations and diphtheria and typhoid inoculations at rural schools during the summer of 1931. A total of three doses of typhoid and diphtheria were necessary, so health staff visited Tuskeena on July 22, 29, and August 5. Tuskeena raised $1.00 for the Tallahassee chapter of the Junior Red Cross in December 1945. The entire school system raised a total of $275.28. (N.A., TD, 1931, 17 July:3; N.A., TD, 1945, 2 December:16).

It is unclear whether Tuskeena was rebuilt or replaced in 1936 by a Works Progress Administration (WPA) project, but the *Tallahassee Democrat* reported on September 1, 1936, that "about 10 men are engaged in building two school buildings, one at Kirksey and another at Tuskeena." By 1946 the school was still not on city water lines, so, in 1946, the board approved the digging of wells at both Tuskeena and Barrow Hill Schools (N.A., TD, 1936, 1 September:5; LCSB, Minutes Ledger 1937-1946:495).

Tuskeena was one of 23 "negro" schools on the closure list for school consolidation in 1949. For the 1949-50 school year, six Black bus drivers were hired -- as rural schools were closed, distances to the new schools were so far that students could no longer walk to school (N.A., TD, 1949, 2 February:2; N.A., TD, 1971, 22 October:5).

Other news about Tuskeena included Rebecca Tucker and Margaret Woodbury, from the junior high level, who won the honor of representing Tuskeena and District IV in the *Tallahassee Democrat's* Negro Spelling Bee of 1950. They would be among the 30 students competing at Lincoln High School on Wednesday, April 5. The following June 2, Rebecca Louise Tucker, Margaret Elizabeth Woodberry [sic], and Essie Lee Austin graduated from Tuskeena and advanced to Lincoln High School. (N.A., TD, 1950, 2 June:6).

In 1951 newspaper articles again began discussing the closure of Tuskeena. The plan was to move the "three-room Tuskeena school to the Barrow Hill schoolgrounds." The Leon County Board of Public Instruction placed a legal notice for accepting bids from contractors on April 10, 1951. Tuskeena, Dawkins Pond School, and Bellair School were rural schools slated for moving to other school grounds. Only one contractor submitted bids for moving the three schools: E.M. Davis of Midway requested $10,300.00 to move all three. Bids of $1,325.00 for the Bellair building and $3,125.00 for the Dawkins Pond buildings were accepted by the board, but the $5,850.00 to move Tuskeena was deferred until a committee could investigate the condition of the building. The committee consisted of Ben Willis, Kent Hall, W.T. Moore Jr., and T.B. Revell. At the May board meeting, the $5,800.00 bid was accepted, and the construction of a rock wall beneath the relocated school for $ 480.00 was also approved (N.A., TD, 1951, 4 April:1; N.A., TD, 1951, 10 April:7; N.A., TD, 1951, 16 May:3).

Mrs. Udo Fleischmann protested the moving of Tuskeena School down Miccosukee Road out of concern that trees would be cut down. She owned most of the property on the four-mile route along which the school would be transported, and she noted that when she granted right-of-way for the road to Leon County it was under the stipulation that no trees would be removed at a later date. The County Board of Commissioners assured her "that there would be a minimum of limb cutting," and permission was granted. Also, during this time, it was decided by the school board "to restore the former site of the Tuskeena Negro school to a condition as near as possible to its original condition." (N.A., TD, 1951, 17 May:2; N.A., TD, 1951, 24 June:2).

> "This is in response to a request from Mrs. Udo Fleishmann [sic], owner of the property. She originally gave the property for school purposes, with the stipulation that it was to be returned to her when no longer used as a school site. The property reverted to Mrs. Fleishman [sic] when Tuskeena school was moved from Miccosukee road to a site on Jacksonville highway" (N.A., TD, 1951, 8 August:1).

By August 19, 1951, Tuskeena School had been moved to the Barrow Hill School site, at the corner of Crump Road and Miles Johnson Road. The school was remodeled, deep wells were drilled, and toilet facilities installed. From 1948-1953 the Leon County school system consolidated 30 African American schools, closing 16 schools while enlarging the other 14. Tuskeena was incorporated into the Barrow Hill School, which operated until 1968 (N.A., TD, 1951, 19 August:25; N.A., TD, 1953, 2 December:13; John G. Riley Center & Museum 1996).

Figure 19. Barrow Hill School Building (November 11, 1965). (State Archives of Florida, Florida Memory).

Figure 20. Barrow Hill School Building, side view (November 11, 1965). (State Archives of Florida, Florida Memory).

New Hope/Testerina Cemetery

In June 2020, the Florida Division of Historic Resources (FDHR) conducted a preliminary assessment of the general area around Testerina Church. It was concluded at that time that ground penetrating radar (GPR) for the detection of graves was not an option due to the heavily vegetated nature of the area (Goodwin and Ackermann 2021). Three reconnaissance-level and cadaver dog surveys were conducted in the north and east area of the present church building (Call 2020; Goodwin 2021; Godwin and Ackerman 2021). During the November 2020 cadaver dog assessment,

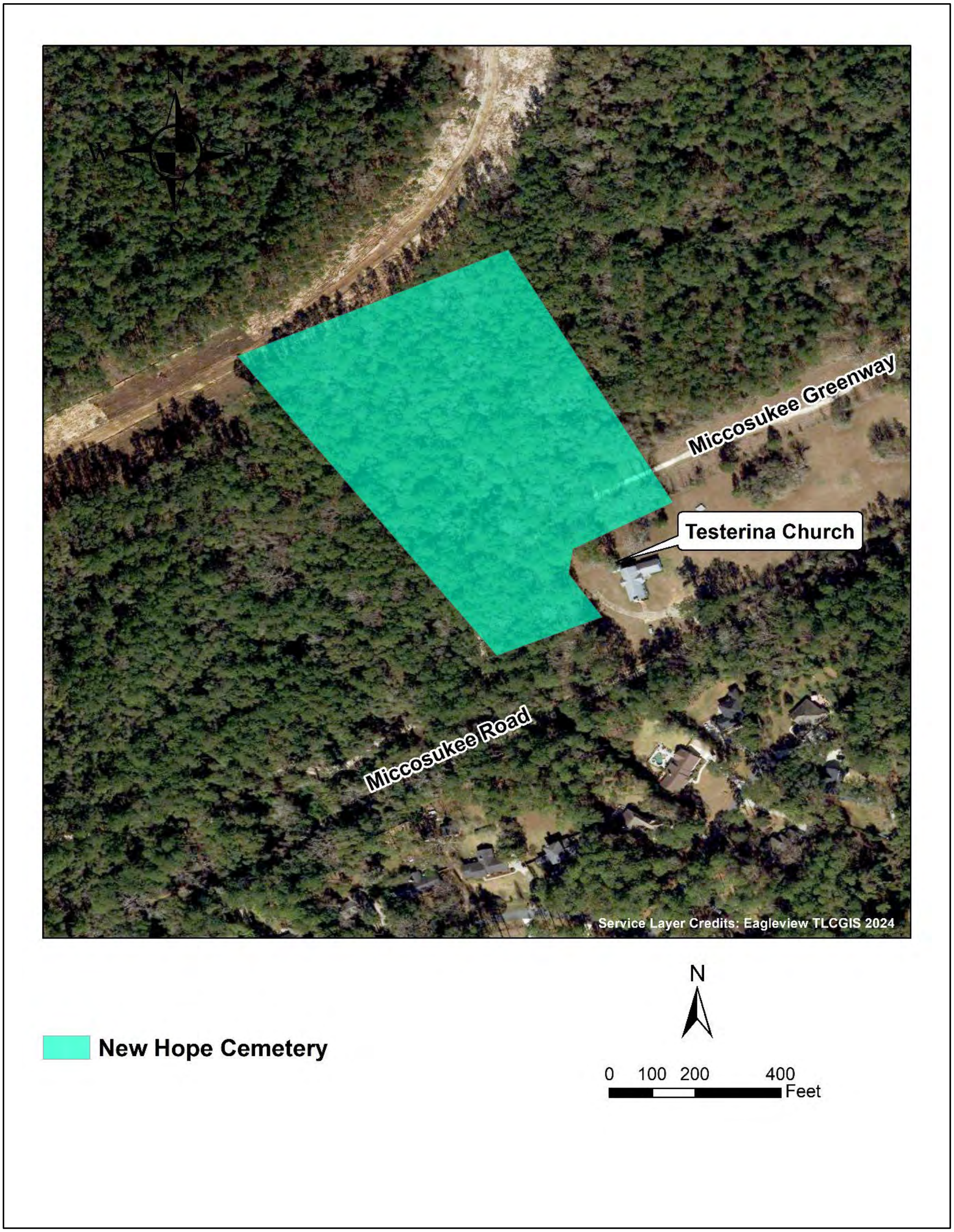

Figure 21. Location of New Hope/Testerina Cemetery (2024).

handlers suggested that the dogs' behavior indicated that the adjacent city-owned property should be evaluated (Goodwin 2021). The investigators surveyed a hilltop and slope to the north in February 2021 and noted depressions, believed to be graves, within the county-maintained Miccosukee Greenway. The dogs alerted at 18 locations during this assessment. As a result, the boundaries of the cemetery were expanded to include these locations. As noted in Goodwin and Ackermann (2021), the current boundary is not exact. Based on current information, however, the boundary provides "an overarching protective diameter" believed to have the greatest potential for interments. The current cemetery boundary extends along the east side of the church property and north of the church and is approximately 10 acres.

No remains of headstones or markers were noted during the survey. Mary Helen Austin Rogers, who attended Tuskeena School in the late in the late 1940s and early 1950s, recollected that she could see simple headstones from her classroom seat (Mary Helen Austin Rogers, personal communication 2025). She believes her ancestors are buried in the New Hope/Testerina Cemetery. Extensive research by Gloria Jefferson Anderson suggested that the cemetery is in an area north of Testerina Primitive Baptist Church, which is within the current boundary shown in Figure 21.

There are three African-American cemeteries within one mile of Testerina Church: Hickory Hill, Munree, originally known as the Fleischmann Cemetery, and Clifford Hill. According to the information on the site file form, land for the Hickory Hill and Munree cemeteries was given to tenant farmers by Ms. Udo Fleischmann. Burials ceased at these cemeteries in 1948 at her request. Local churches were assigned upkeep of the cemeteries after burials ceased.

The New Hope/Testerina Cemetery (8LE06465) was recorded with the Florida Master Site File (FMSF) by Lonnie Mann, member of the Panhandle Archaeological Society in Tallahassee (PAST), on behalf of Ms. Anderson. Her ancestors were enslaved at the antebellum plantations in the area, became tenant farmers in the late nineteenth century, and were interred at the New Hope/Testerina Cemetery. Additionally, it was determined that the New Hope/Testerina Cemetery is within the boundaries of the Welaunee Plantation Resource Group (8LE05007), and the FMSF form for the resource group was updated to reflect the inclusion of New Hope/Testerina Cemetery as a non-contributing resource. According to Mr. Mann, the cemetery was established in 1881 (Lonnie Mann, personal communication, 2021).

Currently there are signs along the Miccosukee Greenway, north of the church, alerting users of the presence of New Hope/Testerina Cemetery. The area is located on a hilltop of pines and mixed hardwoods. The understory consists of a variety of grasses and shrubs. There is no evidence of headstones or ornamental vegetation. Early burials would have probably utilized wooden headstones. If concrete or stone headstones were present, they were removed sometime in the past.

Although there are no markers or headstones to identify who is buried in New Hope/Testerina Cemetery – when or where – the cemetery is a tangible link to those who lived and worked in and around the former site of New Hope Plantation. Despite their anonymity, the cemetery is a monument and memorial to enslaved Americans and their children of the New Hope Community.

New Hope Today

The site of Testerina Church is located between the Miccosukee Canopy Road Greenway, a pedestrian trail to the north, and Miccosukee Road, an automobile throughfare, to the south. It consists of a 1.01-acre tract, upon which the church sits, and a 6.10-acre rectangle-shaped tract that wraps around the church site and runs parallel to Miccosukee Road. Miccosukee Road is now one of eight Canopy Roads designated by Leon County. The road is flanked by huge, moss-draped live oaks, red oaks, sweet gums, hickory trees, and pines that cast a protective shade over the road for almost nine miles. Limbs meet to form a towering canopy above the road. One could say that this stretch of Miccosukee Road is the physical axis of the New Hope Community. The Miccosukee Canopy Road Greenway, which runs behind the church, and possibly through the New Hope/Testerina Cemetery, encompasses, in its entirety, 501.4 acres. It is a public recreational facility that consists of seven miles of maintained trails, running from Fleischmann Road to Crump Road, through picturesque pastureland and forests.

Existing development is low density residential, open space, and agricultural. The City of Tallahassee and Leon County have taken steps to ensure development is completed with respect to the cultural and natural resources in the area. From Fleischmann Road to Crump Road, most residential development exists on the south side of the road, west of the I-10 overpass. This area is zoned mostly RP, for Residential Preservation. North of the road, around Testerina Church, the area is zoned Planned Unit Development (PUD), a type of zoning that allows for a mix of residential, commercial, and recreational uses in a single, master-planned community. The area north of the church, on both sides of I-10, is mostly forested.

A new roadway is being constructed by Blueprint that is designed to improve regional mobility and reduce transportation pressures on existing canopy roads. The Northeast Gateway: Welaunee Boulevard project will create a new gateway into northeast Tallahassee Leon County by extending Welaunee Boulevard five miles to Roberts Road. During extensive planning prior to design of the Northeast Gateway project, a Cultural Resources Assessment (CRA) was conducted for the six mile long, 150-foot-wide project corridor. The CRA consisted of background research and fieldwork to locate any historic resources within the Areas of Potential Effect (APE). This assessment occurred at the same time as the New Hope/Testerina Cemetery 2020-2021 cadaver dog surveys. Based on the findings from the CRA and the cadaver dog surveys, the current boundaries provide an overarching protective diameter around the area believed to be the Cemetery. Additional shovel tests conducted by Atkins, on behalf of Blueprint, to the area north of the recorded boundary of the New Hope Cemetery were negative and confirmed that the proposed roadway would avoid the cemetery area.

West of I-10, land use is agriculture/forestry north of the road, and it is zoned either CPA (Critical Planning Area) or PD (Planned Development). Northeast of I-10 and south of Miccosukee Road, the land is zoned for rural or residential use with a large portion zoned Welaunee PUD. Past Crump Road, most land is zoned for rural use, both north and south of Miccosukee Road. The thoughtful planning of future development along this transportation and recreation corridor has been essential to preserving the historical setting of Testerina Church and New Hope/Testerina Cemetery. This project conducted 77 shovel tests in a +/-1 acre area of the greenway, adjacent the cemetery. There were also seven (7) shovel tests to the west of the cemetery for a grassed parking area and path connecting to the greenway. All shovel tests were negative.

While the exact number of burials and the names of those laid to rest in the New Hope Cemetery is not known, efforts are ongoing toward learning more about them. Descendants of those interred here have established the Descendants of Historic New Hope Cemetery (Testerina) Association, Inc. (Descendants Association). Through their research, they have created a list of surnames of those believed to be buried at the site. This list includes Ardleys, Austin, Banks, Barnes, Brims, Burney, Crewell, Crowell, Ferrell, Footman, Gaphney, Garney, Green, Griffins, Hughes, Jefferson, Jenkins, Joyce, Knight, Knowlons, Lewis, Pemberton, Penny, Reed, Rush, Thompson, Wilson, and Young.

Archival research conducted during the initial project was unable to uncover records to verify any specific burials at the site based on the list of surnames. However, subsequent to the conclusion of the project, death records which may be associated with the New Hope/Testerina Cemetery were uncovered; these are discussed in Appendix B. The founding pastor, Rev. Moses Vaughn is believed to be buried here, though no death or burial records were found. Ms. Anderson, president of the Descendants Association, provided a burial certificate for her great-great-grandmother, Marriah Jefferson, who passed away in 1937, which lists her place of burial as Testerina (Figure 22).

The certificate lists the coroner as W.M. Mitchell, likely referencing the Mitchell Funeral Home, which later became Strong & Jones Funeral Home. Established in 1945 by Thomas Strong and his wife, Mamie Johnson Simmons Strong and incorporated as Thomas Strong Funeral Home in 1947 before Thomas's untimely death that same year, Strong & Jones is Tallahassee's oldest Black-owned business. After her husband's death, Mamie enlisted Elbert W. Jones to take over as the funeral director, and on September 1, 1947, Jones purchased half the business, and thus Strong & Jones was created (Waters 2024). Still in business today, Strong & Jones was more than a funeral home; according to co-owner and daughter of Jones, Linn Ann Griffin, in its early days it also functioned as an ambulance service for Tallahassee's Black community, In an effort to find additional burial records for the New Hope/Testerina Cemetery, staff contacted Strong & Jones Funeral home. To date, no additional records have been located.

Blueprint Intergovernmental Agency and Oneida ESC Group hosted two genealogy workshops for New Hope descendants and local residents with ties to the New Hope Community in August and September 2025. The workshop was held at Eastside Branch Library, 1583 Pedrick Road in Tallahassee. Blueprint and OE staff enlisted the help of Ms. Juanita Gaston to guide the genealogy workshops. Ms. Gaston is a professional genealogist and family historian. She is the founder of JG RootsFinders, LLC, which was established in 2013 as a company that specializes in African American family histories. Her stated mission is to "help others, especially African Americans, better understand where they've come from and some of the pivotal events and circumstances that create their unique family histories," thereby finding inspiration and connection by knowing the paths of their ancestors.

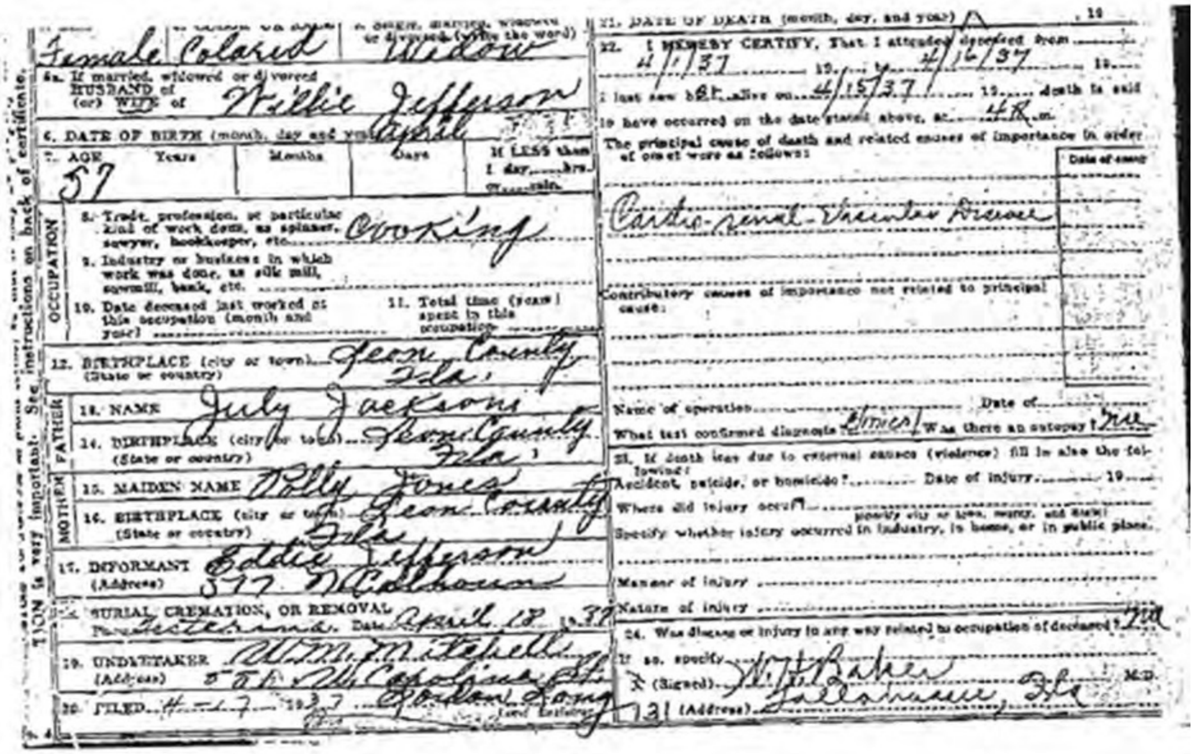
Female Colored | Widow
6a. If married, widowed or divorced HUSBAND of (or) WIFE of Willie Jefferson
6. DATE OF BIRTH (month, day and year) April
7. AGE 57 Years | Months | Days | If LESS than 1 day ... hrs. or ... min.
8. Trade, profession, or particular kind of work done, as spinner, sawyer, bookkeeper, etc. Cooking
9. Industry or business in which work was done, as silk mill, sawmill, bank, etc.
10. Date deceased last worked at this occupation (month and year)
11. Total time (years) spent in this occupation
12. BIRTHPLACE (city or town) (State or country) Leon County Fla.
13. NAME July Jackson
14. BIRTHPLACE (city or town) (State or country) Leon County Fla.
15. MAIDEN NAME Polly Jones
16. BIRTHPLACE (city or town) (State or country) Leon County Fla.
17. INFORMANT Eddie Jefferson (Address) 577 N. Calhoun
18. BURIAL, CREMATION, OR REMOVAL Place Testerina Date April 18, 1937
19. UNDERTAKER W. M. Mitchell (Address) 5 N. McCarolina St.
20. FILED 4-17-1937
21. DATE OF DEATH (month, day, and year) April ..., 19...
22. I HEREBY CERTIFY, That I attended deceased from 4/1/37, 19..., to 4/16/37, 19...; I last saw h... alive on 4/15/37, 19...; death is said to have occurred on the date stated above, at ... 4 P.m.
The principal cause of death and related causes of importance in order of onset were as follows: Date of onset
Cardio-renal-Vascular Disease
Contributory causes of importance not related to principal cause:
Name of operation ... Date of ...
What test confirmed diagnosis Clinical Was there an autopsy? no
23. If death was due to external causes (violence) fill in also the following:
Accident, suicide, or homicide? ... Date of injury ... 19...
Where did injury occur? ... (Specify city or town, county, and State)
Specify whether injury occurred in industry, in home, or in public place.
Manner of injury
Nature of injury
24. Was disease or injury in any way related to occupation of deceased? no
If so, specify
(Signed) W. H. Baker M.D.
(Address) Tallahassee, Fla.

Figure 22. Burial certificate for Marriah Jefferson, stating she was interred at Testerina on April 18, 1937.

Ms. Gaston's passion and expertise made her an outstanding resource to guide the Descendants Association as they embarked on their journey to learn more about their ancestors. Those in attendance included Ms. Gloria Anderson, Ms. Mary Helen Austin Rogers, Sandi Jefferson, Wilbert Jefferson, Wyneva Austin, Carla Lippett, Harry Brown, James Vaughn, Althemese Barnes, Sade Williams, and Iranetta Williams.

The attendees were provided an introduction to genealogy that included tips on how and where to start. Handouts included worksheets and resource guides. Those at the first session were given a “homework assignment” for the next session. During the second workshop, Ms. Gaston provided the class with an array of websites, such as state archives, library resources, and subscription-based databases, through which genealogical information could be obtained. She also informed attendees that she would further facilitate their research through individual guidance, if requested. With descendants actively engaged in family research, their labors will result in identifying those who rest in peace behind the sanctuary of Testerina Primitive Baptist Church.

The most definitive document for learning who is buried at New Hope/Testerina Cemetery, however, is a death certificate that lists the burial site. Death certificates may be obtained from the Florida Department of Health. For death records less than 50 years old that contain the cause of death and full social security number, an *Application for Florida Death or Fetal Death Certificate* (Form DH727), with fee, can be mailed to Florida Department of Health, Bureau of Vital Statistics, Attention: Vital Records Section, P.O. Box 210, Jacksonville, Florida, 32202. Those completing the application must be to the descendant’s spouse or parents; adult children, grandchildren or siblings; person with a documented estate interest, or person working on behalf of the family members with affidavit proving their representation, from each descendant for whom they are working. Anyone of legal age can request death records that omit cause of death and redact the first five social security numbers. To request those records from the Florida Department of Health, applicants need to provide the deceased's name, date or year of death, and location. More information is available at https://www.floridahealth.gov/certificates/certificates/index.html.

It is possible that there are no death records available for an individual. The State of Florida began keeping death records around 1877, but the first state law mandating registration of deaths was passed in 1899. Records kept before 1917 are not complete. Even so, if Descendants Association members create their family trees by using available online records, they can piece together a picture of who their ancestors were. If they can identify their ancestors, they can begin looking for their graves in the cemeteries located in the New Hope Community that have headstones or burial records. Also, although indefinite, one could ultimately conclude who is buried in New Hope/Testerina Cemetery by their absence in other cemeteries.

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APPENDIX A: Site Visit

Several site visits were conducted at Testerina Church and New Hope/Testerina Cemetery to learn more about the church and cemetery. In June 2025, the condition of both the cemetery and the Testerina Church was the subject of a field survey. Located at 5520 Miccosukee Road, Tallahassee, FL, Leon County, 32308 (Figure A-1), the church was constructed in 1961. The building is a central tower church type, a common church type constructed primarily between the 1850s and the 1930s in rural areas and small to medium size towns. There are well maintained shrubs around the building perimeter, and the front tower is flanked by palmetto plants. The structure sits on a gently rolling, well-manicured grassy lawn with densely wooded areas to the north and west. The New Hope/Testerina Cemetery is in the wooded area to the north.

Figure A-1. Testerina Primitive Baptist Church, located at 5520 Miccosukee Road, facing northwest.

The masonry church features a front facing gable roof clad in asphalt shingles with a stepped central tower with two hip roof components; a smaller hip roof section is stacked on top of a larger hip roof section. The structural system is concrete (CMU) block with brick facing set in a running bond pattern on the front (south) elevation, and the tower is also clad in brick. A marble cornerstone is located at the southeastern corner on the east elevation. It states that the church was founded in 1871 by the Rev. Moses Vaughn and the building was remodeled in 1952 by the Rev. G.W. Hill. The spelling of the church's name on the cornerstone, "Testreana," matches its spelling on the United States Geological Service (USGS) topographic map from 1954 (Figure A-2).

Figure A-2. USGS topographic map, Lafayette Quadrangle. 1954, displaying the name of the church as "Testreana Ch."

A round, louvered vent is located above a small tile or stained-glass cross on the smaller, top section of the tower. The lower section is the main entrance. It consists of two wood panel doors with a segmental arched transom window under a segmental arched brick eyebrow. The entrance is accessed via a set of brick steps with metal handrails. The overall façade is symmetrical, with the tower flanked by stained glass windows with triangular arches with brick sills and eyebrows. The side elevations display the same triangular arched stained-glass windows, evenly spaced along the east and west elevations, and divided by concrete block pilasters (Figure A-3). These windows have brick sills and a stepped brick detail above triangular arched brick eyebrows.

Towards the rear of the church are small, gabled, side wings that extend slightly from both sides of the sanctuary. They are constructed of concrete block and have windows that are the same style and design as the windows on the sides of the main block. There is also an open shed roof addition on the west elevation, supported by a single square wood post, that provides shelter for two individual secondary entrances, one of which is accessed via a set of concrete steps. The other provides Americans with Disabilities Act (ADA) access via a wood ramp. The rear elevation of the main structure is largely obscured by attached HVAC equipment. There is a small modern shed to the northwest corner of the church structure.

Figure A-3. West elevation of the Testerina Church, facing east.

A one-story concrete block addition is on the northeast corner of the church (Figure A-5). This addition first appears on aerial photography in 1983. It is constructed in the same style and material as the church's main block. This includes, on the addition's south elevation, the same triangular arched windows divided by concrete block pilasters. It has a side gable roof clad in asphalt shingles. There is a modern panel door at the western end of the addition. Windows on the east elevation consist of two narrow, vinyl 1/1 single-hung-sash windows with brick sills to the south side of the elevation, and one larger vinyl 1/1 single-hung-sash window with a brick sill on the north side of the elevation. There is board-and-batten in the gable end.

The north elevation of this addition has a flush metal door at its eastern corner with a concrete block and poured concrete stoop that has two poured concrete steps. This elevation also displays the concrete block pilasters present elsewhere on the structure but no decorative windows. There is a single window on this elevation that consists of an aluminum three-light awning window with a brick sill. There is a small, shed roof portion, enclosed with vertically pressed plywood, that connects the addition to the rear of the main structure at its rear elevation (Figure A-4).

The Miccosukee Canopy Road Greenway runs generally in an east-west direction north of the church; the path leads directly to the New Hope/Testerina Cemetery, providing access to the site (Figure A-6). While the exact boundaries of the historic cemetery are unknown, previous survey utilizing cadaver dogs has provided an estimated boundary of about 10 acres area north of the Testerina Primitive Baptist Church. The cemetery site is densely wooded. Vegetation consists of mixed pines and hardwoods with an understory of persimmon, smilax, waxmyrtle, beautyberry, coralbean, and other woody shrubs on a gently sloping terrain (Figure A-7). No headstones or markers were noted.

Figure A-4. Concrete block addition at the northeast corner of the east elevation of Testerina Church, facing southwest.

Figure A-5. Concrete block addition at the northeast corner of the east elevation of Testerina Church, facing north.

Figure A-6. View down the Miccosukee Greenway toward the New Hope/Testerina Cemetery, facing west

Figure A-7. New Hope/Testerina Cemetery site, facing south toward the Testerina Primitive Baptist Church

Modern signage has been installed at an unknown time to identify the cemetery location for those using the Miccosukee Canopy Road Greenway trail (Figure A-8). This is a good first step to protecting and preserving the cemetery to avoid further deterioration. During the site visit, several members of the community were observed walking the trail, which is currently open to the public until 9 pm nightly. A historical marker providing history for the New Hope/Testerina Cemetery may be a good way to further protect the cemetery, or to provide history for those using the trail.

Figure A-8. Signage denoting the presence of the cemetery for those using the Miccosukee Greenway trail, facing west.

APPENDIX B: New Hope Death Records May 2026

After the initial site visits and the creation of the main body of this report, additional archival research was conducted which uncovered six death certificates, dated between 1918 and 1937, linked to New Hope Cemetery (Table 1). While these death certificates could not definitively be verified to belong to individuals interred at the New Hope Cemetery located behind the Testerina Primitive Baptist Church, it has been determined that it is probable for at least some of these individuals.

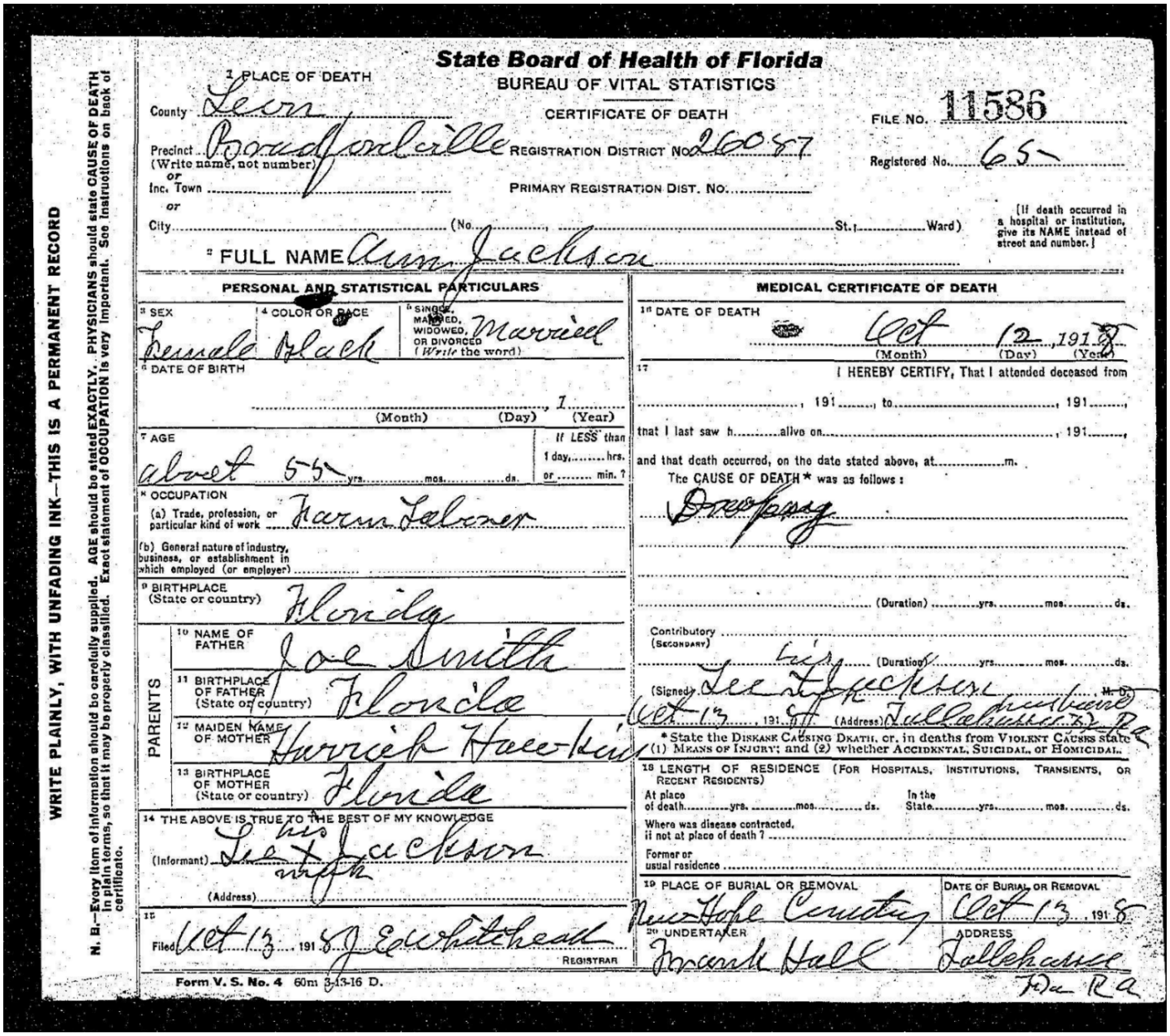
Table 1. Death Certificates for potential New Hope/Testerina Cemetery

Name	Date of Birth	Date of Death	Place of Burial
Jackson, Ann	-	12 October 1918	New Hope Cemetery
Byrd, Daisy	-	6 December 1919	New Hope Cemetery
Burney, Sallie	2 June 1914	19 July 1920	New Hope Cemetery
Ferrell, Annie Louise	15 January 1928	29 January 1928	New Hope Cemetery
Footman, Fannie	-	29 April 1929	New Hope Cemetery
Leon, Maria	-	25 August 1937	New Hope Cemetery

A second New Hope Cemetery was identified close to the Georgia border, located off Apalachee Parkway at 11214 Sunny Hill Road, on the northwest corner of the intersection of Sunny Hill Road and New Hope Church Road, in Leon County; a site visit was conducted to confirm that these death certificates were not associated with this New Hope Cemetery. In May 2026, the site visit revealed thirty marked graves at the New Hope Cemetery north of Tallahassee. The burials date from 1942 and 2011; the oldest burial belongs to Thomas Meeks (1870-1942), and the most recent is for Bruce Meeks Sr. (June 3, 2011). Surnames at this cemetery included Meeks, Lawyer, Gibbs, and Hatcher. None of the surnames on the six death certificates were identified at this New Hope Cemetery, and no evidence of unmarked burials was noted at the time of site visit, though further research would be necessary to definitively establish if this is the case. The New Hope CME Church building is still present but has been abandoned and is in a deteriorated condition. The graves in the adjacent cemetery, located just north of the church, continue to be maintained and recent offerings were present on several of the burial sites.

The team contacted Ms. Gloria Jefferson Anderson, president of the Descendents of Historic New Hope (Testerina) Association, Inc. Ms. Anderson reviewed the uncovered death certificates and recognized surnames that might be associated with families that had been part of the Old Testerina Church and the Old Indian Branch (St. Peter) Church. Information specific to individual death certificates is detailed further below.

Ms. Anderson also stated that her group has collected oral histories from many of the Testerina elders before they had passed away, and that some elders are still living. While oral histories should always be corroborated, obtaining these histories and conducting interviews with the remaining elders could be of value for future research into the New Hope community and the identification of those interred at the New Hope/Testerina Cemetery.



WRITE PLAINLY, WITH UNFADING INK—THIS IS A PERMANENT RECORD

N. B.—Every item of information should be carefully supplied. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact statement of OCCUPATION is very important. See Instructions on back of certificate.

State Board of Health of Florida
BUREAU OF VITAL STATISTICS
CERTIFICATE OF DEATH

1 PLACE OF DEATH
County Leon
Precinct Bradfordville (Write name, not number) REGISTRATION DISTRICT No. 26087
FILE No. 11586
Registered No. 65
or Inc. Town ... PRIMARY REGISTRATION DIST. No. ...
or City ... (No. ... St., ... Ward) [If death occurred in a hospital or institution, give its NAME instead of street and number.]
2 FULL NAME Ann Jackson

PERSONAL AND STATISTICAL PARTICULARS

3 SEX Female
4 COLOR OR RACE Black
5 SINGLE, MARRIED, WIDOWED, OR DIVORCED (Write the word) Married
6 DATE OF BIRTH ... (Month) (Day) (Year)
7 AGE about 55 yrs. ... mos. ... ds. If LESS than 1 day, ... hrs. or ... min.?
8 OCCUPATION (a) Trade, profession, or particular kind of work Farm Laborer
(b) General nature of industry, business, or establishment in which employed (or employer) ...
9 BIRTHPLACE (State or country) Florida
PARENTS
10 NAME OF FATHER Joe Smith
11 BIRTHPLACE OF FATHER (State or country) Florida
12 MAIDEN NAME OF MOTHER Harriet Hawkins
13 BIRTHPLACE OF MOTHER (State or country) Florida
14 THE ABOVE IS TRUE TO THE BEST OF MY KNOWLEDGE
(Informant) Lee his x mark Jackson
(Address) ...
15 Filed Oct 13 1918 J. E. Whitehead REGISTRAR

MEDICAL CERTIFICATE OF DEATH

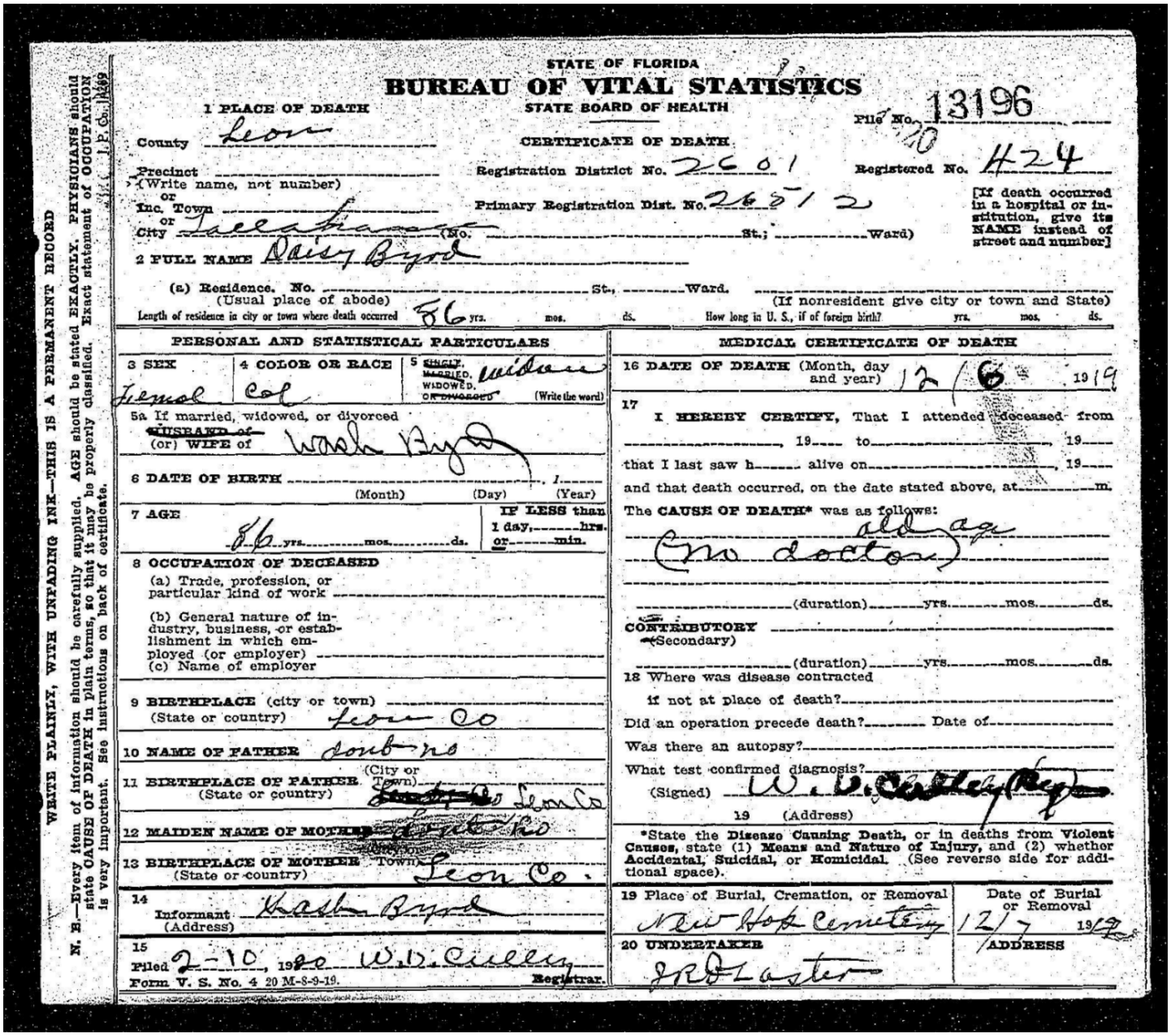
16 DATE OF DEATH Oct (Month) 12 (Day) 1918 (Year)
17 I HEREBY CERTIFY, That I attended deceased from ..., 191..., to ..., 191..., that I last saw h... alive on ..., 191..., and that death occurred, on the date stated above, at ... m.
The CAUSE OF DEATH* was as follows:
Dropsy
(Duration) ... yrs. ... mos. ... ds.
Contributory (Secondary) ... (Duration) ... yrs. ... mos. ... ds.
(Signed) Lee his x mark Jackson husband M.D.
Oct 13, 1918 (Address) Tallahassee Fla
*State the Disease Causing Death, or, in deaths from Violent Causes state (1) Means of Injury; and (2) whether Accidental, Suicidal, or Homicidal.
18 LENGTH OF RESIDENCE (For Hospitals, Institutions, Transients, or Recent Residents)
At place of death ... yrs. ... mos. ... ds. In the State ... yrs. ... mos. ... ds.
Where was disease contracted, if not at place of death? ...
Former or usual residence ...
19 PLACE OF BURIAL OR REMOVAL New Hope Cemetery
DATE OF BURIAL OR REMOVAL Oct 13, 1918
20 UNDERTAKER Frank Hall
ADDRESS Tallahassee Fla RA

Form V. S. No. 4 60m 3-13-16 D.

Figure 1. Death Certificate for Ann Jackson, 1918

Summary:

Ann Jackson is listed on her death certificate as a Black, married female aged approximately 55 years of age at the time of her death. Her occupation is listed as "Farm Laborer." She may have been born into slavery and tying her to one of the area plantations could be helpful in any future research endeavors. She was born to Joe Smith and Harriet Hawkins and lived in the Bradfordville Precinct. She died on October 12, 1918.



STATE OF FLORIDA
BUREAU OF VITAL STATISTICS
STATE BOARD OF HEALTH
CERTIFICATE OF DEATH

File No. 13196

1 PLACE OF DEATH
County Leon
Registration District No. 2601
Registered No. 424
Precinct (Write name, not number) or Inc. Town or City Tallahassee (No. ____ St.; ____ Ward)
Primary Registration Dist. No. 2651/2
[If death occurred in a hospital or institution, give its NAME instead of street and number]

2 FULL NAME Daisy Byrd
(a) Residence. No. ____ St., ____ Ward. (Usual place of abode) (If nonresident give city or town and State)
Length of residence in city or town where death occurred 86 yrs. ____ mos. ____ ds. How long in U. S., if of foreign birth? ____ yrs. ____ mos. ____ ds.

PERSONAL AND STATISTICAL PARTICULARS

3 SEX Femal
4 COLOR OR RACE Col
5 SINGLE, MARRIED, WIDOWED, OR DIVORCED (Write the word) widow
5a If married, widowed, or divorced HUSBAND of (or) WIFE of Wash Byrd
6 DATE OF BIRTH (Month) (Day) (Year)
7 AGE 86 yrs. ____ mos. ____ ds. IF LESS than 1 day, ____ hrs. or ____ min.
8 OCCUPATION OF DECEASED
(a) Trade, profession, or particular kind of work
(b) General nature of industry, business, or establishment in which employed (or employer)
(c) Name of employer
9 BIRTHPLACE (city or town) (State or country) Leon Co
10 NAME OF FATHER dont no
11 BIRTHPLACE OF FATHER (City or Town) (State or country) Leon Co
12 MAIDEN NAME OF MOTHER dont no
13 BIRTHPLACE OF MOTHER (City or Town) (State or country) Leon Co.
14 Informant Wash Byrd (Address)
15 Filed 2-10, 1920 W. D. Cullen Registrar.
Form V. S. No. 4 20 M-8-9-19.

MEDICAL CERTIFICATE OF DEATH

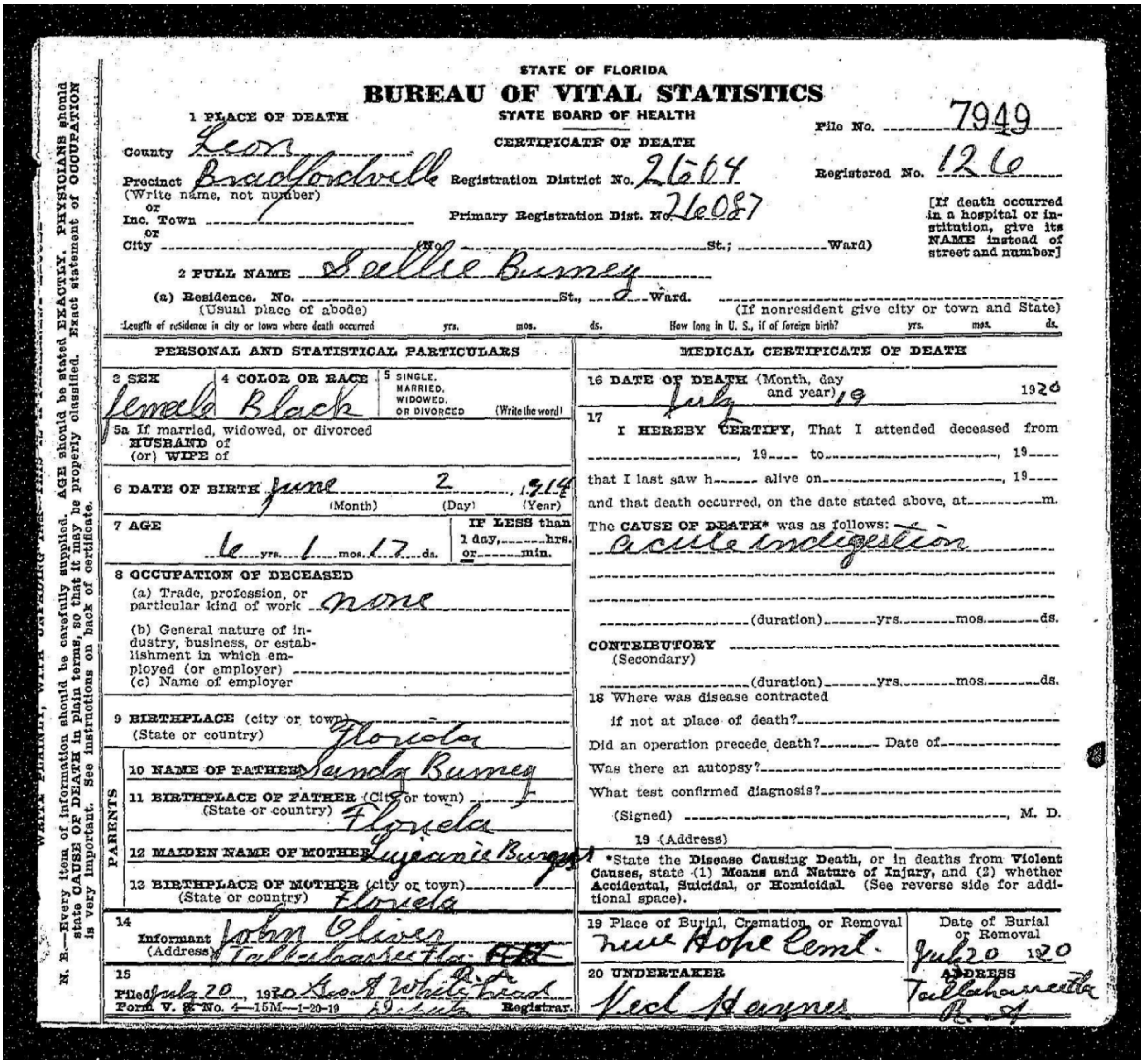
16 DATE OF DEATH (Month, day and year) 12/6 1919
17 I HEREBY CERTIFY, That I attended deceased from ____ 19__ to ____ 19__ that I last saw h__ alive on ____ 19__ and that death occurred, on the date stated above, at ____ m.
The CAUSE OF DEATH* was as follows: old age (no doctor)
(duration) ____ yrs. ____ mos. ____ ds.
CONTRIBUTORY (Secondary) ____ (duration) ____ yrs. ____ mos. ____ ds.
18 Where was disease contracted if not at place of death?
Did an operation precede death? ____ Date of ____
Was there an autopsy?
What test confirmed diagnosis?
(Signed) W. D. Cullen Reg
19 (Address)
*State the Disease Causing Death, or in deaths from Violent Causes, state (1) Means and Nature of Injury, and (2) whether Accidental, Suicidal, or Homicidal. (See reverse side for additional space).
19 Place of Burial, Cremation, or Removal New Hope Cemetery
Date of Burial or Removal 12/7 1919
20 UNDERTAKER J R D Laster
ADDRESS

N. B.—Every item of information should be carefully supplied. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact statement of OCCUPATION is very important. See instructions on back of certificate.
WRITE PLAINLY, WITH UNFADING INK—THIS IS A PERMANENT RECORD

Figure 2. Death Certificate for Daisy Byrd, 1919

Summary:

Daisy Byrd is listed on her death certificate as a colored female who was widow to Wash Byrd. She was aged 86 years at the time of her death and died of "old age (no doctor)." She was born in Leon County and the identity of both mother and father are listed as "don't know." It is possible that she was born into slavery, and tying her to one of the area plantations could be helpful in any future research endeavors. She died on December 6, 1919.


STATE OF FLORIDA
BUREAU OF VITAL STATISTICS
STATE BOARD OF HEALTH
CERTIFICATE OF DEATH

1 PLACE OF DEATH
County Leon
Precinct Bradfordville Registration District No. 2664
(Write name, not number)
or Inc. Town
Primary Registration Dist. No. 26087
or City (No.) St.; Ward)
File No. 7949
Registered No. 126
[If death occurred in a hospital or institution, give its NAME instead of street and number]

2 FULL NAME Sallie Burney
(a) Residence. No. (Usual place of abode) St., Ward. (If nonresident give city or town and State)
Length of residence in city or town where death occurred yrs. mos. ds. How long in U. S., if of foreign birth? yrs. mos. ds.

PERSONAL AND STATISTICAL PARTICULARS
3 SEX Female
4 COLOR OR RACE Black
5 SINGLE, MARRIED, WIDOWED, OR DIVORCED (Write the word)
5a If married, widowed, or divorced HUSBAND of (or) WIFE of
6 DATE OF BIRTH June (Month) 2 (Day) 1914 (Year)
7 AGE 6 yrs. 1 mos. 17 ds. IF LESS than 1 day, hrs. or min.
8 OCCUPATION OF DECEASED
(a) Trade, profession, or particular kind of work none
(b) General nature of industry, business, or establishment in which employed (or employer)
(c) Name of employer
9 BIRTHPLACE (city or town) (State or country) Florida
PARENTS
10 NAME OF FATHER Sandy Burney
11 BIRTHPLACE OF FATHER (City or town) (State or country) Florida
12 MAIDEN NAME OF MOTHER Lujanie Burquet
13 BIRTHPLACE OF MOTHER (city or town) (State or country) Florida
14 Informant John Oliver
(Address) Tallahassee Fla.
15 Filed July 20, 1920 Geo A Whitehead Registrar.
Form V. S. No. 4—15M—1-20-19

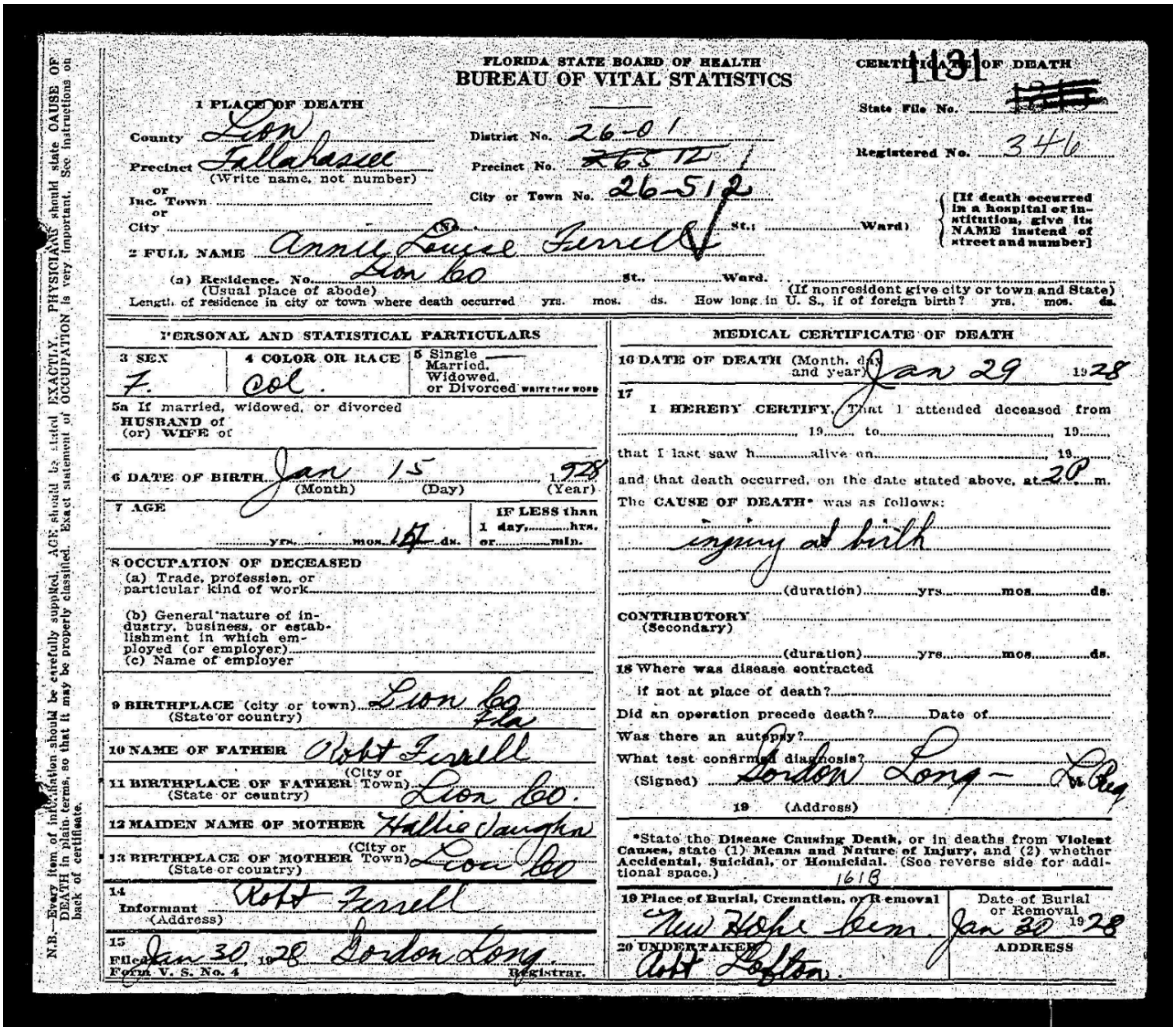
MEDICAL CERTIFICATE OF DEATH
16 DATE OF DEATH (Month, day and year) July 19, 1920
17 I HEREBY CERTIFY, That I attended deceased from , 19 to , 19
that I last saw h alive on , 19
and that death occurred, on the date stated above, at m.
The CAUSE OF DEATH* was as follows: acute indigestion
(duration) yrs. mos. ds.
CONTRIBUTORY (Secondary)
(duration) yrs. mos. ds.
18 Where was disease contracted if not at place of death?
Did an operation precede death? Date of
Was there an autopsy?
What test confirmed diagnosis?
(Signed) , M. D.
19 (Address)
*State the Disease Causing Death, or in deaths from Violent Causes, state (1) Means and Nature of Injury, and (2) whether Accidental, Suicidal, or Homicidal. (See reverse side for additional space).
19 Place of Burial, Cremation, or Removal New Hope Cemt.
Date of Burial or Removal July 20 1920
20 UNDERTAKER Ned Haynes
ADDRESS Tallahassee Fla.

N. B.—Every item of information should be carefully supplied. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact statement of OCCUPATION is very important. See instructions on back of certificate.

Figure 3. Death Certificate for Sallie Burney, 1920

Summary:

Sallie Burney is listed on her death certificate as a Black female born on June 2, 1914 and lived in the Bradfordville Precinct. She was aged 6 years, 1 month, and 17 days at the time of her death. Sallie was born to father Sandy [sic] Burney and mother Lujanie [sic] Burquet [sic]. She died on July 19, 1920. Her cause of death is listed as "acute indigestion."



FLORIDA STATE BOARD OF HEALTH
BUREAU OF VITAL STATISTICS
CERTIFICATE OF DEATH 1131
State File No.
1 PLACE OF DEATH
County Leon
District No. 26-01
Precinct Tallahassee (Write name, not number)
Precinct No. 26512
Registered No. 346
or Inc. Town
City or Town No. 26-512
or City
St.; Ward)
[If death occurred in a hospital or institution, give its NAME instead of street and number]
2 FULL NAME Annie Louise Ferrell
(a) Residence. No. Leon Co St., Ward. (Usual place of abode) (If nonresident give city or town and State)
Length of residence in city or town where death occurred yrs. mos. ds. How long in U. S., if of foreign birth? yrs. mos. ds.

PERSONAL AND STATISTICAL PARTICULARS
3 SEX F.
4 COLOR OR RACE Col.
5 Single, Married, Widowed, or Divorced (write the word)
5a If married, widowed, or divorced HUSBAND of (or) WIFE of
6 DATE OF BIRTH Jan (Month) 15 (Day) 1928 (Year)
7 AGE yrs. mos. 14 ds. IF LESS than 1 day, hrs. or min.
8 OCCUPATION OF DECEASED
(a) Trade, profession, or particular kind of work
(b) General nature of industry, business, or establishment in which employed (or employer)
(c) Name of employer
9 BIRTHPLACE (city or town) (State or country) Leon Co Fla
10 NAME OF FATHER Robt Ferrell
11 BIRTHPLACE OF FATHER (City or Town) (State or country) Leon Co.
12 MAIDEN NAME OF MOTHER Hallie Vaughn
13 BIRTHPLACE OF MOTHER (City or Town) (State or country) Leon Co
14 Informant Robt Ferrell (Address)
15 Filed Jan 30, 1928 Gordon Long Registrar.
Form V. S. No. 4

MEDICAL CERTIFICATE OF DEATH
16 DATE OF DEATH (Month, day and year) Jan 29 1928
17 I HEREBY CERTIFY, That I attended deceased from 19 to 19
that I last saw h alive on 19
and that death occurred, on the date stated above, at 20 m.
The CAUSE OF DEATH* was as follows:
injury at birth
(duration) yrs. mos. ds.
CONTRIBUTORY (Secondary) (duration) yrs. mos. ds.
18 Where was disease contracted if not at place of death?
Did an operation precede death? Date of
Was there an autopsy?
What test confirmed diagnosis?
(Signed) Gordon Long - L. Reg
19 (Address)
*State the Disease Causing Death, or in deaths from Violent Causes, state (1) Means and Nature of Injury, and (2) whether Accidental, Suicidal, or Homicidal. (See reverse side for additional space.) 1618
19 Place of Burial, Cremation, or Removal New Hope Cem
Date of Burial or Removal Jan 30 1928
20 UNDERTAKER Robt Lofton
ADDRESS

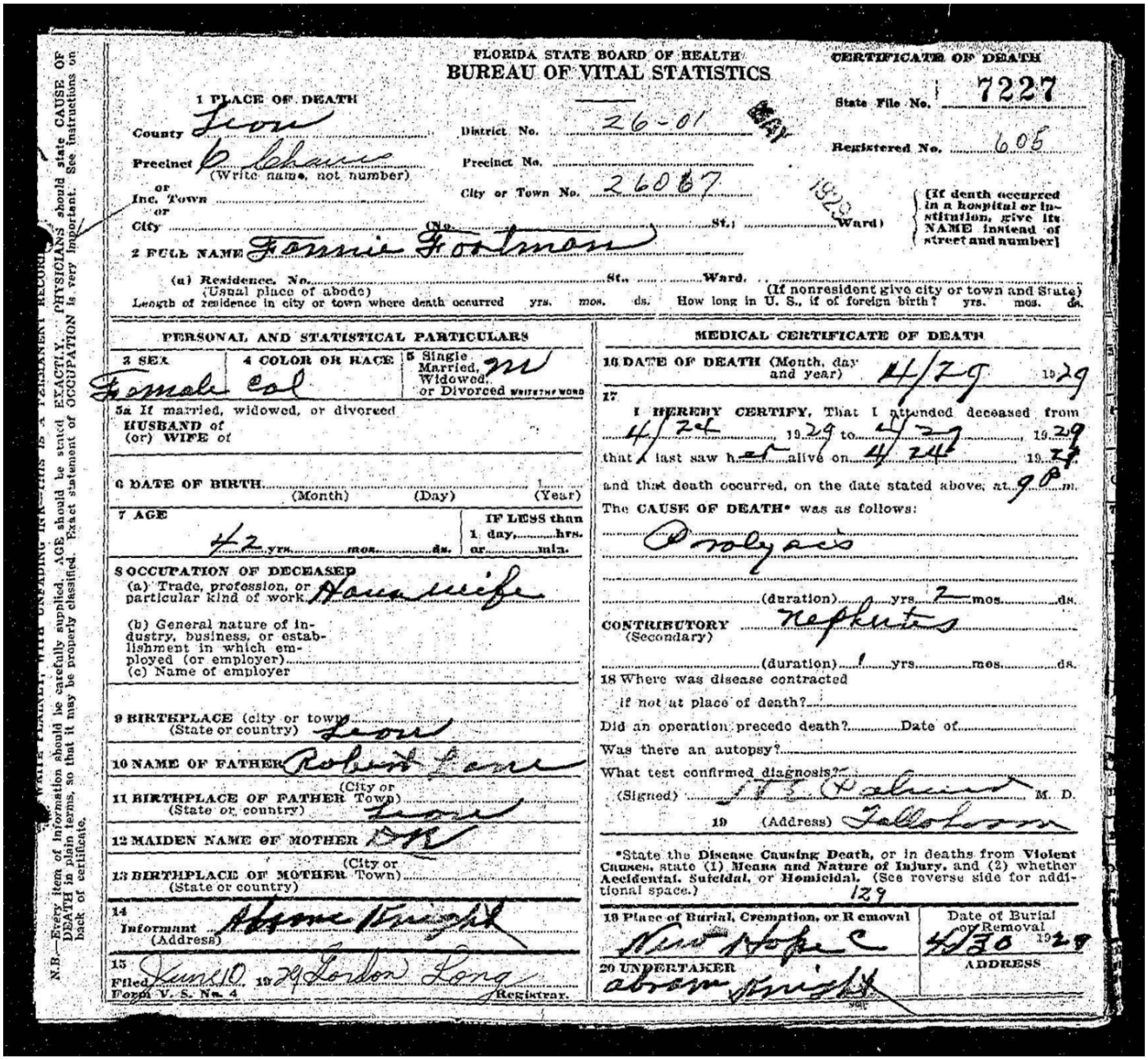
N.B.—Every item of information should be carefully supplied. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact statement of OCCUPATION is very important. See instructions on back of certificate.

Figure 4. Death Certificate for Annie Louise Ferrell, 1928

Summary:

Annie Louise Ferrell is listed on her death certificate as a female colored child born on January 15, 1928 in the Tallahassee Precinct to Robert Ferrell and Hallie Vaughn (maiden name). Annie died just two weeks later on January 29, 1928 with the cause of death listed as "injury at birth."

According to information provided by Ms. Anderson, Hallie Vaughn, mother to Annie Louise Ferrell, was the daughter of Moses Vaughn, founding preacher of the Testerina Church (Anderson 2026). According to the Find a Grave website, Hallie Vaughn Ferrell (1909-1988) and husband Robert Ferrell Sr. (1906-1953) are both interred at Clifford Hill Cemetery. The headstone for the Ferrells includes the monikers "mother" and "father," respectively. The website lists an associated grave for son, Clarence Ferrell (1941-2020), but no other burials for additional children at Clifford Hill Cemetery (Find a Grave 2026).



FLORIDA STATE BOARD OF HEALTH
BUREAU OF VITAL STATISTICS
CERTIFICATE OF DEATH

State File No. 7227
Registered No. 605

1 PLACE OF DEATH
County Leon
District No. 26-01
Precinct P. Chaires (Write name, not number)
Precinct No.
or Inc. Town
or City
City or Town No. 26067
No. St.; Ward) [If death occurred in a hospital or institution, give its NAME instead of street and number]

2 FULL NAME Fannie Footman

(a) Residence. No. St., Ward. (Usual place of abode) (If nonresident give city or town and State)
Length of residence in city or town where death occurred yrs. mos. ds. How long in U. S., if of foreign birth? yrs. mos. ds.

PERSONAL AND STATISTICAL PARTICULARS

3 SEX Female
4 COLOR OR RACE Col
5 Single, Married, Widowed, or Divorced (write the word) M
5a If married, widowed, or divorced HUSBAND of (or) WIFE of
6 DATE OF BIRTH (Month) (Day) (Year)
7 AGE 42 yrs. mos. ds. IF LESS than 1 day, hrs. or min.
8 OCCUPATION OF DECEASED
(a) Trade, profession, or particular kind of work House wife
(b) General nature of industry, business, or establishment in which employed (or employer)
(c) Name of employer
9 BIRTHPLACE (city or town) (State or country) Leon
10 NAME OF FATHER Robert Leon
11 BIRTHPLACE OF FATHER (City or Town) (State or country) Leon
12 MAIDEN NAME OF MOTHER DK
13 BIRTHPLACE OF MOTHER (City or Town) (State or country)
14 Informant Abrome Knight (Address)
15 Filed June 10 1929 Gordon Long Registrar.
Form V. S. No. 4

MEDICAL CERTIFICATE OF DEATH

16 DATE OF DEATH (Month, day and year) 4/29 1929
17 I HEREBY CERTIFY, That I attended deceased from 4/24 1929 to 4/29 1929
that I last saw her alive on 4/24 1929
and that death occurred, on the date stated above, at 9 P.m.
The CAUSE OF DEATH* was as follows:
Paralysis
(duration) yrs. 2 mos. ds.
CONTRIBUTORY (Secondary) Nephritis
(duration) 1 yrs. mos. ds.
18 Where was disease contracted if not at place of death?
Did an operation precede death? Date of
Was there an autopsy?
What test confirmed diagnosis?
(Signed) J. T. E. Palmer M. D.
19 (Address) Tallahassee

*State the Disease Causing Death, or in deaths from Violent Causes, state (1) Means and Nature of Injury, and (2) whether Accidental, Suicidal, or Homicidal. (See reverse side for additional space.)

19 Place of Burial, Cremation, or Removal New Hope C.
Date of Burial or Removal 4/30 1929
20 UNDERTAKER Abrom Knight
ADDRESS

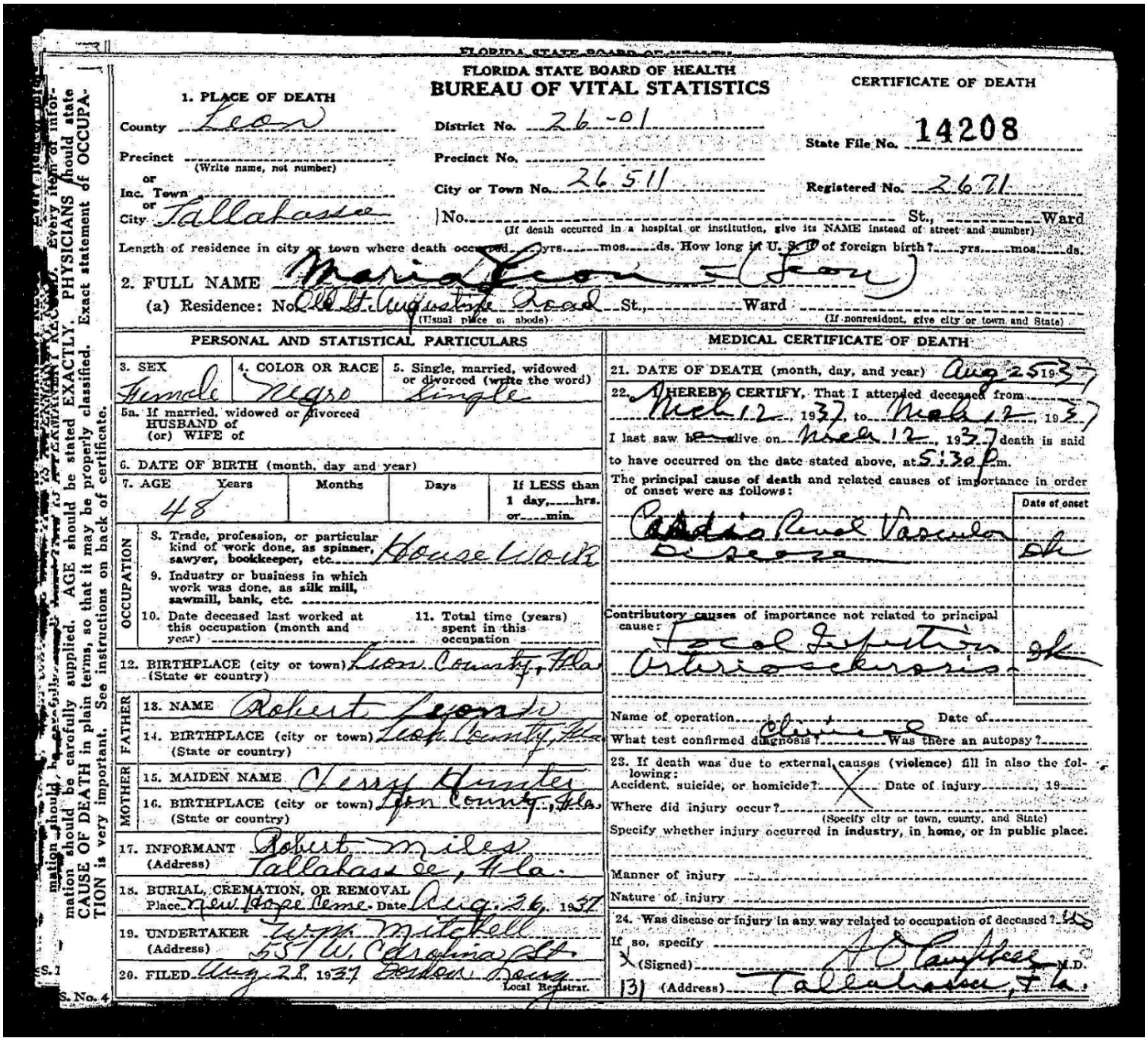
N.B.—Every item of information should be carefully supplied. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact statement of OCCUPATION is very important. See instructions on back of certificate.

Figure 5. Death Certificate for Fannie Footman, 1929

Summary:

Fannie Footman is listed as a married, colored female on her death certificate aged 42 years old at the time of her death. Her occupation is listed as that of a housewife. Her father is listed as Robert Leon. Ms. Footman died on April 29, 1929, and her cause of death is listed as paralysis for a duration of two years.

According to information provided by Ms. Anderson, the Leon family are members of the descendants of Testerina; it is possible that Ms. Footman and her father, Robert Leon, are ancestors to the Leon's associated with the descendants of Testerina (Anderson 2026).


FLORIDA STATE BOARD OF HEALTH
BUREAU OF VITAL STATISTICS
CERTIFICATE OF DEATH

1. PLACE OF DEATH
County Leon
District No. 26-01
State File No. 14208
Precinct (Write name, not number)
Precinct No.
or Inc. Town or City Tallahassee
City or Town No. 26511
Registered No. 2671
No. (If death occurred in a hospital or institution, give its NAME instead of street and number) St., Ward
Length of residence in city or town where death occurred yrs. mos. ds. How long in U. S. if of foreign birth? yrs. mos. ds.

2. FULL NAME Maria Leon (Leon)
(a) Residence: No. Old St. Augustine Road St., Ward (Usual place of abode) (If nonresident, give city or town and State)

PERSONAL AND STATISTICAL PARTICULARS
3. SEX Female
4. COLOR OR RACE Negro
5. Single, married, widowed or divorced (write the word) Single
5a. If married, widowed or divorced HUSBAND of (or) WIFE of
6. DATE OF BIRTH (month, day and year)
7. AGE Years 48 Months Days If LESS than 1 day, hrs. or min.
OCCUPATION
8. Trade, profession, or particular kind of work done, as spinner, sawyer, bookkeeper, etc. House Work
9. Industry or business in which work was done, as silk mill, sawmill, bank, etc.
10. Date deceased last worked at this occupation (month and year)
11. Total time (years) spent in this occupation
12. BIRTHPLACE (city or town) (State or country) Leon County, Fla.
FATHER
13. NAME Robert Leon
14. BIRTHPLACE (city or town) (State or country) Leon County, Fla.
MOTHER
15. MAIDEN NAME Cherry Hunter
16. BIRTHPLACE (city or town) (State or country) Leon County, Fla.
17. INFORMANT Robert Miles
(Address) Tallahassee, Fla.
18. BURIAL, CREMATION, OR REMOVAL
Place New Hope Ceme. Date Aug. 26, 1937
19. UNDERTAKER Tupp Mitchell
(Address) 537 W. Carolina St.
20. FILED Aug. 28, 1937 Local Registrar.

MEDICAL CERTIFICATE OF DEATH
21. DATE OF DEATH (month, day, and year) Aug 25 1937
22. I HEREBY CERTIFY, That I attended deceased from March 12, 1937, to March 12, 1937
I last saw her alive on March 12, 1937 death is said to have occurred on the date stated above, at 5:30 P.m.
The principal cause of death and related causes of importance in order of onset were as follows: Date of onset
Cardio Renal Vascular Disease
Contributory causes of importance not related to principal cause:
Focal Infection
Arteriosclerosis
Name of operation Date of
What test confirmed diagnosis? Clinical Was there an autopsy?
23. If death was due to external causes (violence) fill in also the following:
Accident, suicide, or homicide? Date of injury 19
Where did injury occur? (Specify city or town, county, and State)
Specify whether injury occurred in industry, in home, or in public place.
Manner of injury
Nature of injury
24. Was disease or injury in any way related to occupation of deceased? No
If so, specify
(Signed) M.D.
(Address) Tallahassee, Fla.

Figure 6. Death Certificate for Mary Lyon, 1937

Summary:

Maria Leon is listed as single, female negro on her death certificate. She was approximately 48 years of age at the time of her death. Ms. Leon's occupation is listed as that of housework. She was born to Robert Leon and Cherry Hunter (maiden name) in Leon County. Her residence is listed as Old St. Augustine Road, which no longer appears to be extant under this name. She died of cardiovascular disease on August 25, 1937.

According to information provided by Ms. Anderson, the Leon family are members of the descendants of Testerina; it is possible that Maria and her father, Robert Leon, are ancestors to the Leons associated with the descendants of Testerina (Anderson 2026).

References for Appendix B

Anderson, Gloria Jefferson
2026 “New Hope Death Records” received by Sarah McDonald. 1 May 2026, Email Correspondence

Find a Grave
2026 Hallie Vaughn Ferrell, website https://www.findagrave.com/memorial/70738919/hallie-ferrell. Accessed 13 May 2026.

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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #4

September 24, 2026

Title:	Status Report on the Impact of Technology on the Local Workforce
Category:	Consent
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, PLACE Keith Bowers, Director, Office of Economic Vitality Dan Lucas, Business Intelligence Manager, Office of Economic Vitality

STATEMENT OF ISSUE:

As requested at the June 11, 2026, meeting of the Blueprint Intergovernmental Agency Board of Directors (IA Board), this item presents a status report on the impact of technology, and of artificial intelligence in particular, on the local workforce, and seeks the IA Board's acceptance of that report. Artificial intelligence, commonly shortened to AI, is computer software that performs tasks that have historically required a person, such as drafting written material, answering customer questions, and analyzing data. The report addresses six matters: the composition of the local labor market and the degree to which it is exposed to AI; the pace at which technologies of this kind are adopted; the benefits and risks AI adoption presents for the local economy; the results of the Office of Economic Vitality (OEV) AI Readiness and Workforce Development Survey, completed in July 2026 by 66 local employers; the current national research on AI's effect on employment, including the points on which that research disagrees; and the measures OEV has identified and already implemented, including the Accelerate AI Initiative, a collaboration agreement OEV executed on July 2, 2026 that provides AI solutions to up to 120 local businesses at no design or implementation cost to those businesses or to the Agency. Staff recommends that the IA Board accept the report.

FISCAL IMPACT:

This item has no fiscal impact.

RECOMMENDED ACTION:

Option 1: Accept the status report on the Impact of Technology on the Local Workforce.

SUPPLEMENTAL INFORMATION:

At its June 11, 2026, meeting, the Board directed staff to return with an analysis of the potential impacts of technology, specifically artificial intelligence, on the local workforce. This report responds to that direction. It first explains what distinguishes artificial intelligence from earlier technologies, because that distinction determines how broadly and how quickly AI reaches local jobs. It then addresses, in the following order: the composition of the Tallahassee metropolitan area labor market and the degree to which that composition is exposed to AI; the pace at which new technologies are adopted; the benefits and risks AI adoption presents for the local economy; what several local employers reported in OEV's July 2026 survey; what current national research does and does not establish; the principal companies supplying AI tools; the measures staff identified to prepare the local economy; and the actions OEV has already taken, including the Accelerate AI Initiative and OEV's longer-standing economic diversification, talent pipeline, and small business programs. At its June 11, 2026, meeting, the Board also directed staff to bring back policy options to prohibit Blueprint funding or allowing incentives for Data Centers using OEV funds. That item is scheduled for the IA Board's November 12, 2026, meeting.

At its foundation, technology is the practical application of scientific knowledge to solve problems. Technologies do not all affect a workforce in the same way, and the difference matters to the analysis that follows. Incremental technologies are small, continuous improvements made to an existing product or service to keep it competitive, reliable, and up to date, such as an operating system update for a computer or mobile device. Sustaining technologies are innovations that improve the performance of established products along dimensions that mainstream customers already value, such as new models of mobile phone that offer new features. Breakthrough technologies create completely new industries that did not exist previously, such as the invention of the airplane. Disruptive technologies enter an existing market and displace the businesses that led it, such as digital cameras replacing film cameras. The first two categories (Incremental and Sustaining) rarely change what workers do; the second two (Breakthrough and Disruptive) change which jobs exist and what those jobs require.

Artificial intelligence (AI) falls into all four categories at the same time. It is an adaptable core technology that improves continuously, it makes established products more capable, it has created industries that did not exist a decade ago, and it displaces existing ways of performing work. That combination is what separates AI from a single new product: it is a general capability that spreads across every industry rather than a tool confined to one. AI has accordingly become a mainstream operating input for organizations of nearly every size and sector, and local economic development organizations are increasingly expected to help ensure regional workforces and small businesses are not left behind.

The report reaches three conclusions. First, the local economy is stable, and the composition of its employment base, concentrated in professional, government, and other office-based work, places Tallahassee-Leon County among the communities where AI will be felt earliest. That timing is an advantage when preparation begins now. Second, local employers are already using AI, and they have told OEV directly that they intend to retrain their existing employees rather than reduce their workforces. Third, the capability those employers most want is practical skill in using AI tools, which is training the community is positioned to deliver. OEV has already begun delivering it through the Accelerate AI Initiative, and the measures described below build on that work.

The Tallahassee MSA Labor Market

The Tallahassee Metropolitan Statistical Area (MSA) is characterized by a labor market with a composition that makes it distinctively exposed to the kind of task automation AI enables. While there is no economy-wide employment collapse imminent, the Tallahassee MSA labor market is heavily weighted toward government, professional, and knowledge-based office work rather than manufacturing or goods production.

In fact, government, professional and business services, and education and health together account for well over half of MSA employment. These are the office- and knowledge-work environments where generative AI tools are being adopted fastest nationally. National research consistently finds administrative, clerical, and business-operations occupations face the highest task-automation exposure, and, as shown in Table #1 below, these are heavily represented in Tallahassee's base.

Table 1: Tallahassee MSA Employment Sectors

Sector (2025 average)	Employment	Approx. share of nonfarm
Government (federal, state, local)	~63,300	~31%
Professional & business services	~29,600	~15%
Private education & health services	~27,300	~14%
Leisure & hospitality	~20,500	~10%
Total nonfarm (all sectors)	~203,600	100%

Source: U.S. Bureau of Labor Statistics, Current Employment Statistics (CES), 2025 monthly average (thousands of persons, not seasonally adjusted). Shares are approximate and rounded; sectors shown are illustrative of AI-exposed categories and do not sum to 100%.

Current local indicators are steady. The MSA unemployment rate of 5.0% sits modestly above the recent local low of approximately 4.0% in mid-2025, and the labor force has remained broadly stable near 208,600, as shown in Table 2 below. Total nonfarm employment, which is the standard federal count of all jobs other than farm work, grew by approximately 900 positions, or 0.5%, over the year. Growth at that pace means the community's response to AI-driven change will rest primarily on preparing the workers already employed here, which is the approach reflected in the measures described later in this report.

Table 2: Tallahassee MSA Economic Indicators

Indicator	Value	Notes
Civilian labor force	~208,600	LAUS, smoothed, June 2026
Unemployment rate (MSA)	5.0%	LAUS, June 2026; up 0.9 pts year-over-year
Total nonfarm employment	~198,600	CES, June 2026
Net nonfarm job change, June 2024–June 2025	+~900 jobs	CES; up +0.5% year-over-year

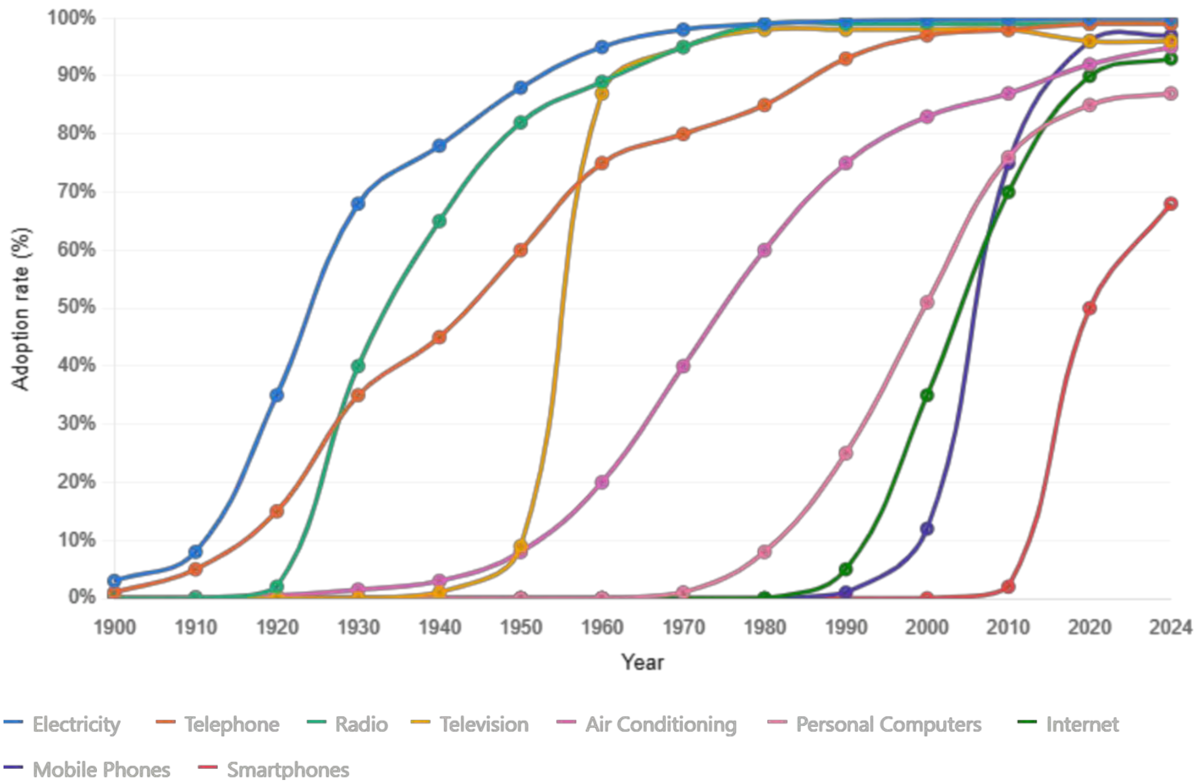
Source: U.S. Bureau of Labor Statistics. Unemployment and labor force from the Local Area Unemployment Statistics (LAUS) program; nonfarm employment and job change from the Current Employment Statistics (CES) establishment survey. Metro-area figures are not seasonally adjusted unless noted and are subject to revision.

As described in more detail in the sections below, OEV is working to provide opportunities for reskilling the existing workforce in AI tools, to increase diversity of employment sectors, and to recruit and expand businesses to create new job opportunities.

Rapid Technology Adoption

Historically, technology adoption follows a classic s-curve pattern. That is, adoption starts with slow growth, accelerates steeply in the middle as momentum builds, and flattens out as the technology becomes widespread. Figure 1 below shows the adoption curves for various technologies over more than a century in the United States and other developed countries.

Figure 1: Technology Adoption Curves



A few important patterns are illustrated by Figure 1:

Early technologies (1900–1960) — Electricity and the telephone show slow initial growth, then rapid acceleration through the mid-20th century, eventually plateauing near universal adoption. Radio experienced explosive growth in the 1920s–1940s before being displaced by television.

The television era (1950–1980) — TV adoption was remarkably fast, reaching 87% by 1960 and plateauing in the decades after. It is one of the fastest-adopted technologies, though smartphone adoption is now outpacing it.

The digital revolution (1980–present) — Personal computers, the internet, mobile phones, and smartphones each follow the classic S-curve but at increasingly accelerated timescales. The internet went from 5% to 90% adoption in just 25 years (1990–2015). Smartphones, launched in 2007, reached 50% adoption by 2020 — faster than any predecessor.

The speed-up effect — Each successive technology seems to adopt faster than the last, likely due to existing infrastructure, network effects, and consumer familiarity with digital adoption. Electricity took 70 years to reach widespread adoption; smartphones achieved similar penetration in roughly a decade.

Technology Displacement —Newer technologies don't fully displace predecessors. For example, television and radio still exist but newer technologies capture the growth energy and new users' attention.

As seen with other recent technologies, the adoption of AI is anticipated to be rapid.

Benefits And Risks of AI Adoption

AI adoption offers meaningful benefits for the local economy: productivity and cost efficiency by automating repetitive administrative tasks; competitiveness for small businesses that can adopt AI-assisted marketing, forecasting, and customer service without proportionally larger headcounts; new and higher-skilled roles carrying a documented wage premium; better decision-making through improved analytics; and stronger positioning to attract investment and talent.

The risks are equally concrete. Job displacement is concentrated in administrative and clerical work, operations, and certain sales and marketing functions. Readiness varies across businesses, with adoption in many cases running ahead of formal planning, which is the gap the support measures described later in this report are designed to close. Skills and training gaps persist. Data privacy and cybersecurity exposure is the challenge local employers cite most often. A distributional risk also exists, meaning the workers displaced by AI and the workers who gain the new roles are frequently not the same people. Finally, wage and opportunity gaps could widen if access to AI-skills training is not broadly available.

OEV Survey Findings

The preceding sections describe national and structural conditions. To ground the issue in local conditions, OEV surveyed area employers directly. In July 2026, OEV distributed a survey to local business owners to assess current AI awareness and adoption, anticipated uses, and potential workforce impacts within the Tallahassee-Leon County business community. The survey received 66 responses, primarily from employers in Professional Services (25) and the nonprofit sector (10), with small businesses comprising the majority of respondents. Fifty-five percent reported having 1–10 employees, while 23% reported having 11–50 employees. More than half (55%) described themselves as “very familiar” with AI and actively using it, and 88% reported using AI either extensively or for limited applications. Only 5% indicated that they have no plans to adopt AI. The most common current or anticipated uses include marketing and content creation (35 responses), data analysis and forecasting (34), and process automation (26).

When asked how AI is expected to affect their workforce over the next three years, the largest number of respondents (35) anticipated retraining or upskilling existing employees, compared with 15 who anticipated workforce reductions and 12 who expected no significant impact. Administrative and clerical functions were identified as the most exposed to AI-related changes (38 responses), followed by sales and marketing (24), operations and production (23), and IT and data analytics (20).

Respondents also placed considerably greater emphasis on practical AI proficiency than on technical development skills. The ability to use AI tools (52 responses) and process automation and workflow optimization (37) ranked as the most important skills, while programming and coding (7) and machine learning (2) ranked substantially lower. Employee training and upskilling programs were identified as the most valued form of support (41 responses, 39%). Additionally, 94% of respondents indicated at least some willingness to partner with OEV on future AI workforce initiatives, with 44% responding "yes" and 50% responding "maybe."

Latest Research and Analyses

Local survey results describe what employers intend to do. National research describes what has already occurred in labor markets where AI adoption began earlier. Credible research on AI's workforce impacts generally falls into four categories, and a more complete picture emerges when the findings are considered together.

1) Projection studies. The World Economic Forum's "Future of Jobs Report 2025" projects that, by 2030, approximately 92 million jobs could be displaced while 170 million new jobs are created, resulting in a net gain of 78 million jobs. The report also estimates that nearly 40% of workers' existing skills will change and that 85% of employers plan to prioritize workforce upskilling. Similarly, the McKinsey Global Institute estimates that activities representing approximately 40% of total U.S. wages have the potential to be automated.

2) Real-time empirical evidence. Research from the Stanford Digital Economy Lab provides early evidence of how AI exposure may already be affecting employment. Its study, "Canaries in the Coal Mine," by Brynjolfsson, Chandar, and Chen, analyzed ADP payroll data across more than 730 occupations. The researchers found that early-career workers ages 22–25 in occupations with the greatest AI exposure experienced an approximately 13% relative decline in employment, while employment among workers age 30 and older remained stable or increased.

3) Labor-market and industry research. Three major 2024–2025 reports, Lightcast's "Beyond the Buzz" and "Fault Lines," and IBISWorld's "Are Human Workers Replaceable?" provide additional insight into how AI is changing skills, occupations, and workforce needs. Lightcast's "Beyond the Buzz" found that more than half of job postings requiring AI skills are now outside IT and computer science, indicating that demand for AI capabilities is spreading across the broader economy. Positions requiring AI skills also offered salaries approximately 28% higher than comparable positions without those requirements, an annual premium of roughly $18,000. Lightcast further found that the average job experienced a 32% change in required skills over just three years, while job postings referencing generative AI exceeded 80,000 in 2024.

   Lightcast's "Fault Lines" identifies three structural forces complicating workforce planning: geopolitical competition affecting talent availability and migration; AI-driven disruption that is occurring unevenly across industries; and persistent labor shortages. Together, these factors are accelerating changes in employer skill requirements and making long-term workforce planning increasingly difficult.

IBISWorld provides an important distinction between task automation and job elimination. Most occupations consist of multiple tasks, meaning AI may automate or augment certain responsibilities without eliminating the position itself. As a result, the more likely near-term outcome for many occupations is job transformation rather than wholesale job replacement. The report also emphasizes that successful technology adoption requires complementary investments in employee training, organizational processes, and infrastructure—factors that can slow the pace of AI adoption across industries.

4) Productivity and wage-premium findings. PwC's Global AI Jobs Barometer finds that productivity growth has nearly quadrupled in industries with the greatest AI exposure. Workers with AI-related skills also command a substantial wage premium, estimated at approximately 56% to 62%. However, that premium is considerably smaller in government and public-sector occupations (approximately 16%), a distinction particularly relevant to the Tallahassee-Leon County economy.

A counterpoint to predictions of rapid workforce disruption comes from the Budget Lab at Yale and related research from the Brookings Institution. Their findings indicate no discernible economy-wide labor-market disruption during the approximately 33 months following the release of ChatGPT, with layoffs attributed specifically to AI remaining relatively small compared with those resulting from broader economic conditions.

Taken together, the research points to a labor market undergoing significant transformation rather than imminent, economy-wide job displacement. The evidence suggests that AI is placing measurable pressure on some entry-level and highly exposed office occupations while simultaneously increasing demand and wage premiums for workers with practical AI skills. The central workforce challenge, therefore, is likely to be less about widespread job elimination and more about how quickly workers, employers, and workforce systems can adapt to changing tasks and skill requirements.

Major Companies Shaping the AI Landscape

The AI vendor landscape remains concentrated among a small number of frontier developers alongside a broader enterprise and infrastructure ecosystem: OpenAI (ChatGPT/GPT, integrated with Microsoft); Anthropic (Claude, safety-focused, widely used in enterprise and regulated industries); Google DeepMind (Gemini, across Google Workspace and Cloud); Microsoft (Copilot across Word, Excel, Outlook, Teams, and Azure — the most common entry point for small businesses on Microsoft 365); Meta (open-source Llama); and NVIDIA (the hardware underlying nearly all frontier AI). For local planning, the tools already in front of most employees, chat-based assistants embedded in everyday office software, are most relevant to near-term training investment, aligning with the survey's finding that "use of AI tools" far outranks coding or machine learning in local employer demand.

Future-Proofing the Local Economy

The preceding sections establish the local exposure, the pace of adoption, the benefits and risks, what local employers report, the national evidence, and the tools in common use. The remainder of this report addresses what staff identified in response and what OEV has already done. "Future-proofing" is the process of building, designing, or planning systems, technology, or careers today so they remain useful and resilient when future changes happen. Within the context of technology, particularly the capacity to adapt as AI capability and adoption evolve, staff identified the following measures, organized around the support types local employers identified as most valuable:

- Employee training and upskilling (top-ranked local priority): Sponsor practical, tool-level AI literacy training targeted at the small-business majority, prioritizing the most-exposed functions, such as administrative/clerical, sales/marketing, and operations, for early reskilling cohorts.
- Advisory support and implementation guidance: Establish an AI adoption advisory service or office hours to address the top-cited barrier, uncertainty about how to implement AI, and provide baseline data-privacy and cybersecurity guidance.
- Education and training partnerships: Pursue formal partnerships with local colleges and technical schools, building on the interest of 17 survey respondents and the broader 94% openness to collaboration.
- Small-business and sector-specific support: Develop sector-specific guidance reflecting how Professional Services and Nonprofit employers are adopting AI and coordinate targeted outreach to underrepresented sectors such as construction and healthcare.
- Monitoring and equity safeguards: Track local AI adoption and workforce impact over time, and design training access to reach the most-exposed functions and smallest firms first.

OEV's Proactive Response: The Accelerate AI Initiative

OEV has already taken concrete steps towards implementing the measures identified above. On July 2, 2026, OEV executed a Collaboration Agreement with Nub8, a consulting firm certified by Amazon Web Services (AWS) as an Advanced Tier Services Partner, meaning it has met the AWS requirements for staff certification and completed project work. The agreement launched the Accelerate AI Initiative, which helps local small and mid-sized businesses adopt practical AI solutions at no design or implementation cost to the businesses or to OEV. The initiative directly addresses the adoption and implementation barriers local employers identified as their leading challenges. The key terms of the initiative are summarized in Table 3 below.

Table 3: Key Features of the Accelerate AI Initiative

Program feature	Provision under the Agreement
Partners	OEV and Nub8 (an AWS Advanced Tier Services Partner), leveraging Amazon Web Services
Scale	Up to 120 local businesses over the 12-month initial term
Pace	Target of up to ~10 businesses per month (may vary by season and capacity)
Business selection	Businesses selected by OEV; one AI solution per business via a joint needs assessment
Cost to businesses / OEV	No cost for design and implementation; businesses pay only ongoing AWS hosting after deployment (AWS credits possible)
Governance	Joint Oversight Committee with monthly reporting and formal quarterly reviews

Each participating business receives one of four solutions, matched to the business through a joint assessment of its needs: An AI Assistant (customer-inquiry automation), Inventory Management and Sales Forecasting, 360 Customer Dashboards, or Intelligent Document Processing. The solution is matched to the business's profile through a joint needs assessment. These correspond directly to the survey's leading AI uses and to the practical tool-fluency local employers most value. Staff notes one important boundary: the initiative is principally a solution-adoption program, whereas the survey's single most-requested form of support was employee training and upskilling. It is therefore complementary to, but not a substitute for, the workforce training and education-partnership measures above, which staff recommends pursuing alongside the Nub8 partnership so that adoption and workforce readiness advance together.

Other Efforts to Future-Proof the Local Economy

OEV's efforts to prepare the Tallahassee-Leon County economy for technological change extend beyond AI adoption. A central component of long-term economic resilience is building a more diversified economy and developing a workforce capable of adapting as industries, occupations, and required skills evolve.

OEV's Target Industry strategy supports this objective by focusing business recruitment, retention, and expansion efforts on industries that broaden the region's economic base and create employment opportunities across a range of occupations and skill levels. These efforts help reduce the region's dependence on any single sector while strengthening industries positioned for continued growth and innovation.

The four Targeted Industry sectors are:

- Applied Sciences & Innovation
- Manufacturing & Transportation Logistics
- Professional Services & Information Technology
- Healthcare

OEV's Targeted Business Program offers incentives to businesses that are expanding or relocating to Tallahassee-Leon County. OEV has engaged with 171 prospective companies considering relocation or expansion opportunities in Tallahassee-Leon County, resulting to date in five formally announced projects involving economic development incentives. Prospective projects are assigned code names to protect the identity of companies during the confidential and competitive site-selection process.

Once a company commits to relocating to or expanding in Tallahassee-Leon County and the project is formally announced, OEV publicly discloses the company's identity and key project commitments, including applicable local and state incentives, jobs to be created, saved, or retained, planned capital investment, and the projected economic impact of the project. This approach protects company confidentiality while a location decision is pending while ensuring transparency and accountability once an incentivized project is finalized.

Attachment #3 provides a list of named projects and approved Incentive Projects.

As noted earlier, OEV will be bringing policy options to prohibit Blueprint funding or allowing incentives for Data Centers using OEV funds to the IA Board at their November 12, 2026, meeting.

Additionally, OEV works with education, workforce, and industry partners to strengthen the local talent pipeline and expose students to career opportunities across the regional economy. Leon Works routinely engages more than 600 high school students each year, providing opportunities to explore skilled career pathways and interact with more than 150 employers and community partners. Over the last five years, Leon Works facilitated insights to career paths for more than 4,000 students. North Florida Worlds of Work (WOW) reaches more than 1,000 students through immersive, hands-on experiences representing a cross section of local industries and occupations.

Finally, OEV works to "future proof" the economy by supporting the small businesses in the community. OEV's efforts to diversify the Tallahassee-Leon County economy extend beyond the recruitment and expansion of larger employers and include strengthening the community's existing base of small and locally owned businesses. Through its Minority, Women, and Small Business Enterprise (MWSBE) Division, OEV connects local businesses with resources that can help them build capacity, compete for new opportunities, and grow within the community.

The MWSBE Division serves as a connector between small businesses and available local, state, federal, and partner resources, including grants, financing programs, technical assistance, business counseling, and training. The Division also works to expand access to procurement opportunities by certifying eligible businesses, communicating upcoming contracting opportunities with the City of Tallahassee, Leon County Government, and Blueprint Intergovernmental Agency, and helping firms better understand and navigate public procurement processes. Outreach, workshops, and capacity-building initiatives further connect businesses with procurement professionals, prime contractors, financial institutions, and other business-support organizations.

These efforts contribute to economic diversification by strengthening the number, capacity, and competitiveness of locally owned businesses across a range of industries. Helping small businesses secure contracts, access capital, develop new capabilities, and expand their customer base supports business growth and job creation while increasing the share of economic activity generated and retained within Tallahassee-Leon County. In this way, OEV's small business development activities complement its business recruitment, expansion, workforce development, and targeted-industry strategies to create a broader, more resilient local economy.

Together, these initiatives represent complementary elements of OEV's broader economic resilience strategy. Target Industry recruitment and expansion help diversify the types of jobs available in the community; Leon Works and North Florida Worlds of Work help prepare the next generation to enter those career pathways; supporting small businesses help broaden the economy and ensure that the economy is not dependent upon a small number of large employers, and initiatives such as Accelerate AI and the workforce-training measures recommended in this report help existing businesses and workers adapt to technological change. Collectively, these efforts strengthen the region's capacity to withstand economic and technological disruptions while positioning Tallahassee-Leon County to capture new opportunities as the economy evolves.

CONCLUSION:

The Tallahassee-Leon County economy is stable; however, the labor market composition is distinctively exposed to AI-driven change because its employment base is concentrated in the government and knowledge-work functions where AI is being adopted fastest. The evidence does not indicate an imminent, economy-wide jobs collapse, but it does show real pressure on entry-level office roles and a growing premium for practical AI skills.

Local employers report high AI usage but limited maturity, and they overwhelmingly favor reskilling their existing workforce over layoffs. To meet this need, OEV executed a Collaboration Agreement with Nub8 to launch the Accelerate AI Initiative that helps local small and mid-sized businesses adopt practical AI solutions at no implementation cost to the businesses or to OEV.

OEV's approach to future-proofing the local economy extends beyond responding to AI alone. Through its Target Industry strategy, OEV continues to diversify the regional economy and expand employment opportunities across a broader range of industries and occupations. At the same time, workforce development initiatives such as Leon Works and North Florida Worlds of Work expose thousands of students to career pathways and connect the emerging workforce with employers across a cross section of the local economy. Additionally, efforts to support small businesses promote entrepreneurship and broaden the business base so the local economy is not dependent on a few large employers. These efforts complement initiatives focused on helping today's businesses and workers adapt to technological change while positioning Tallahassee-Leon County to capture the opportunities created by an evolving economy.

OPTIONS:

Option 1: Accept the status report on the Impact of Technology on the Local Workforce.

Option 2: Do not accept the status report on the Impact of Technology on the Local Workforce.

Option 3: IA Board direction

RECOMMENDED ACTION:

Option 1: Accept the status report on the Impact of Technology on the Local Workforce.

Attachments:

1. OEV AI Readiness & Workforce Development Survey — Full Results (66 responses).
2. Collaboration Agreement between the Tallahassee-Leon County Office of Economic Vitality and Nub8 (executed July 2, 2026).
3. Current list of named projects and incentive projects.

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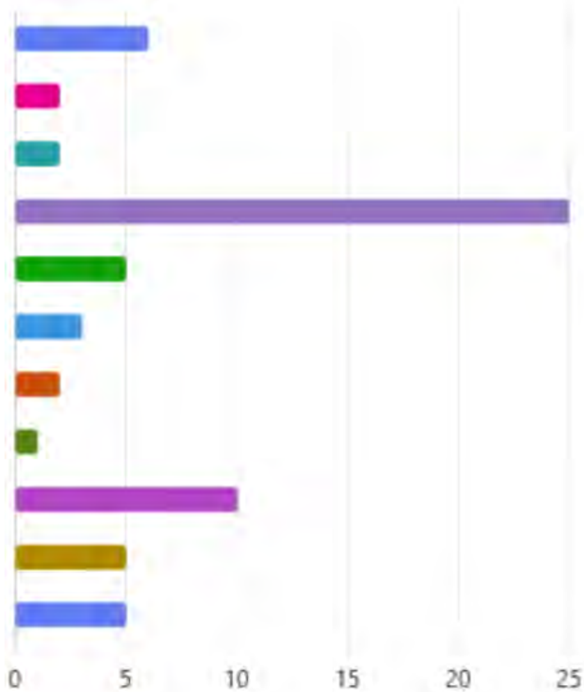
Responses Overview

Active

Responses	Average Time	Duration
66	09:08	18 Days

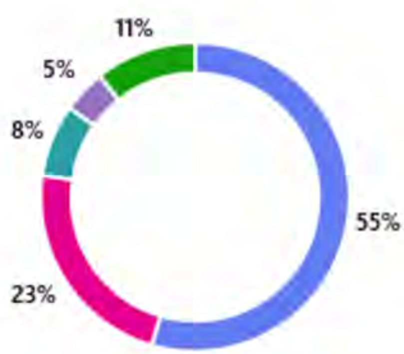
1. Which industry best describes your organization's primary business activity? *(Select one)*

Healthcare	6
Manufacturing	2
Transportation	2
Professional Services	25
Information Technology	5
Retail	3
Construction	2
Government	1
Nonprofit	10
Education	5
Other	5



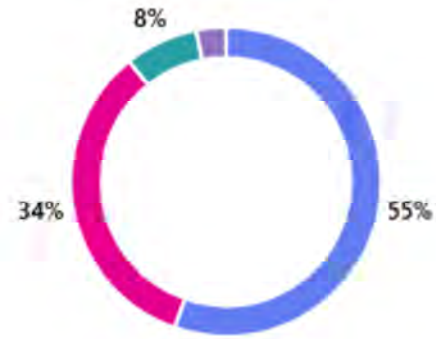
2. How many employees does your organization have?

1-10	36
11-50	15
51-100	5
101-250	3
251+	7



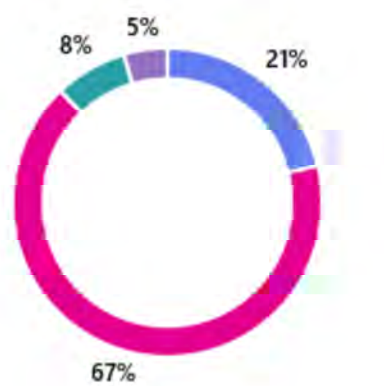
3. How would you rate your organization's familiarity or working knowledge of artificial intelligence (A I)?

Very familiar (actively using AI tools and strategies)	36
Somewhat familiar (basic understanding or limited use)	22
Limited familiarity (aware of AI but not currently using it)	5
Not familiar	2



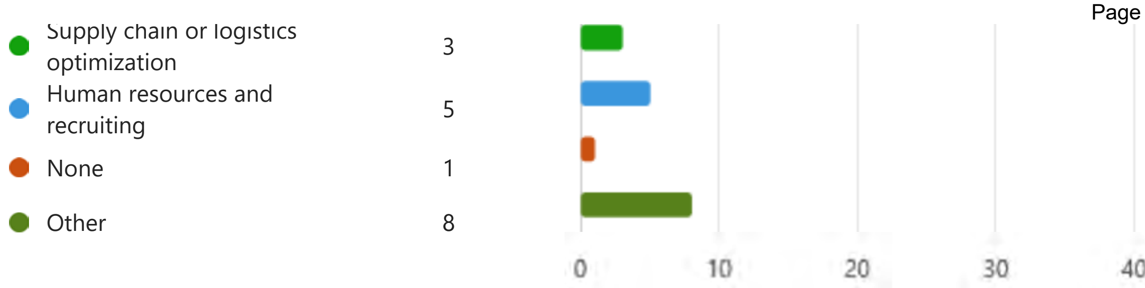
4. Is your organization currently using AI or automation tools?

Yes – extensively	14
Yes – in limited applications	44
Not yet, but planning to within the next 1–2 years	5
No plans at this time	3

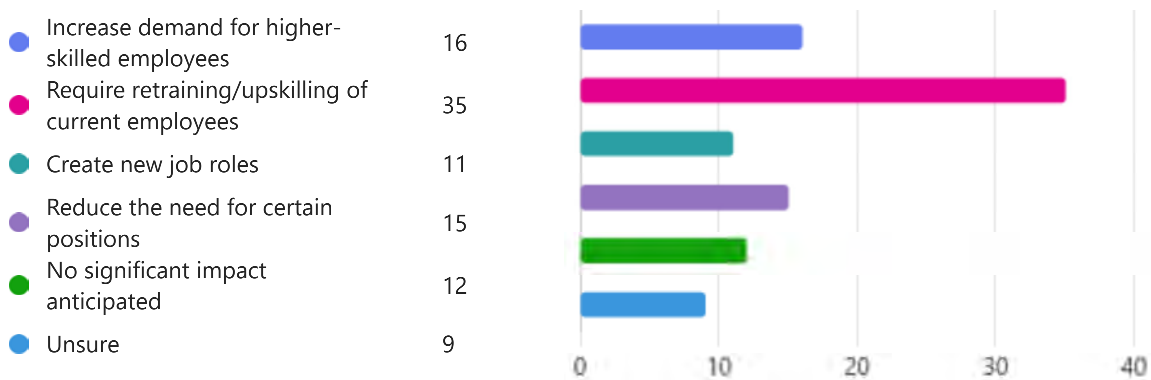


5. What are your organization's primary uses (or anticipated uses) of AI? (Select up to two)

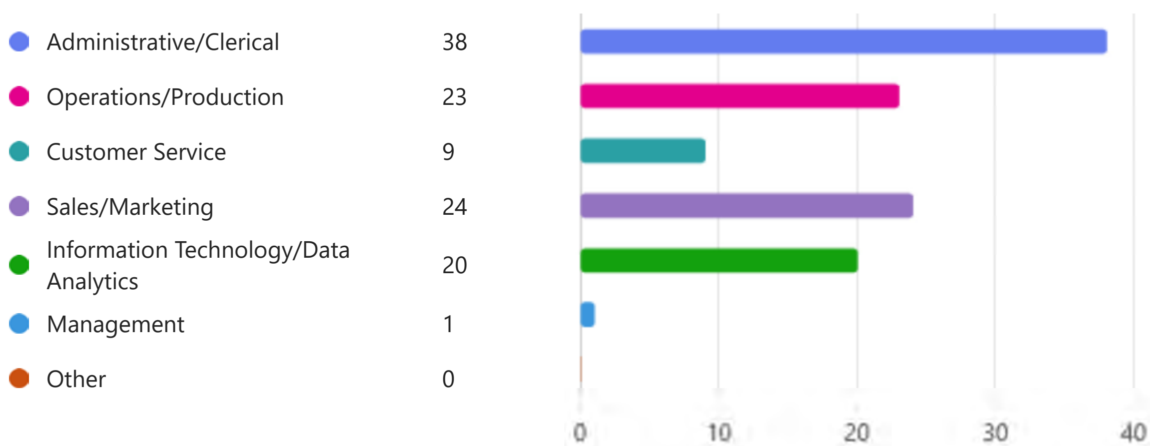
Data analysis and forecasting	34
Process automation	26
Customer service/chatbots	7
Marketing and content creation	35



6. How do you expect AI to impact your workforce over the next three years? (Select up to two)

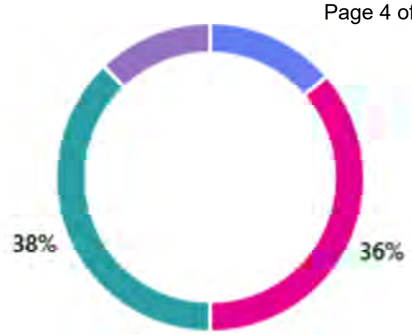


7. Which job functions within your organization are most likely to be impacted by AI? (Select up to two)



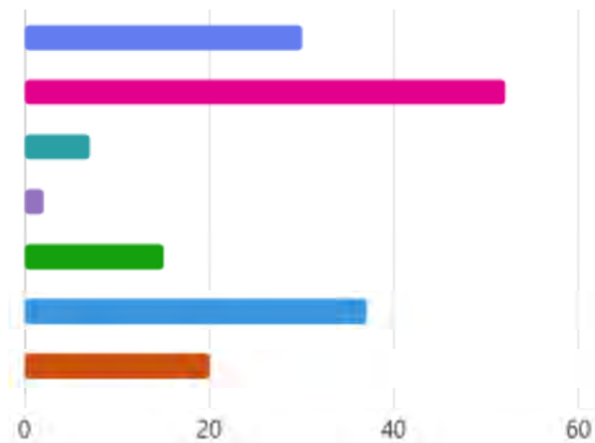
8. Do you anticipate hiring employees with AI-related skills during the next 1–3 years?

Yes – significant hiring anticipated	9
Yes – limited hiring anticipated	24
No, but we expect to upskill existing employees	25
No anticipated need	8



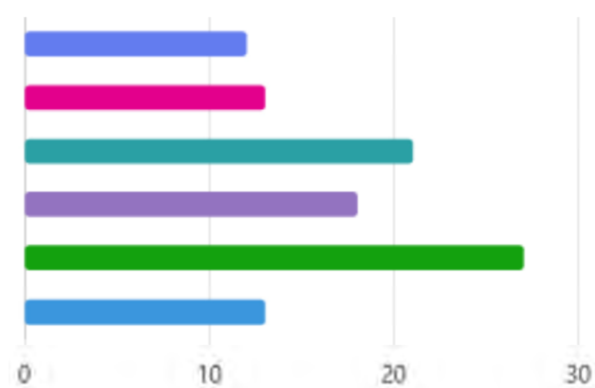
9. Which AI-related skills are most important to your organization? (Select up to three)

Data analysis and interpretation	30
Use of AI tools (e.g., ChatGPT, Copilot, Gemini, Claude)	52
Programming/coding	7
Machine learning or advanced AI applications	2
Cybersecurity and data privacy	15
Process automation and workflow optimization	37
General digital literacy skills	20



10. What are the biggest challenges your organization faces related to AI? (Select up to two)

Lack of qualified talent	12
Cost of training or hiring	13
Uncertainty about how to implement AI	21
Limited internal expertise	18
Data privacy and cybersecurity concerns	27
Not currently a priority	13

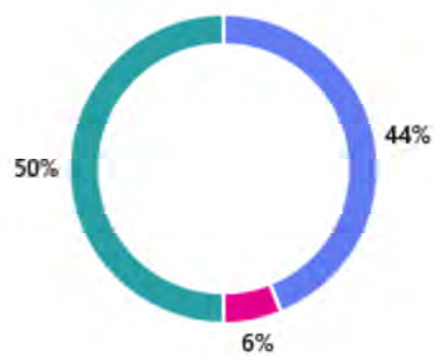


11. What types of workforce support would be most valuable to your organization? (Select up to two)

- Employee training and upskilling programs 41
- Internships or apprenticeships 7
- Partnerships with local colleges or technical schools 17
- Customized employer-based training 20
- Advisory support regarding AI adoption 21

12. Would your organization be interested in partnering with OEV and other community stakeholders on future workforce initiatives related to AI?

- Yes 29
- No 4
- Maybe 33



13. What would help your organization better prepare for AI-driven changes in the workplace?

39

Responses

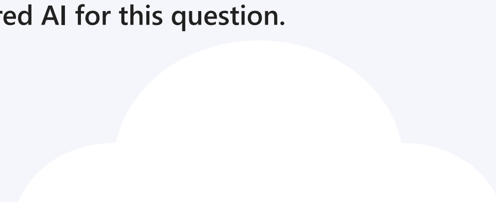
Latest Responses

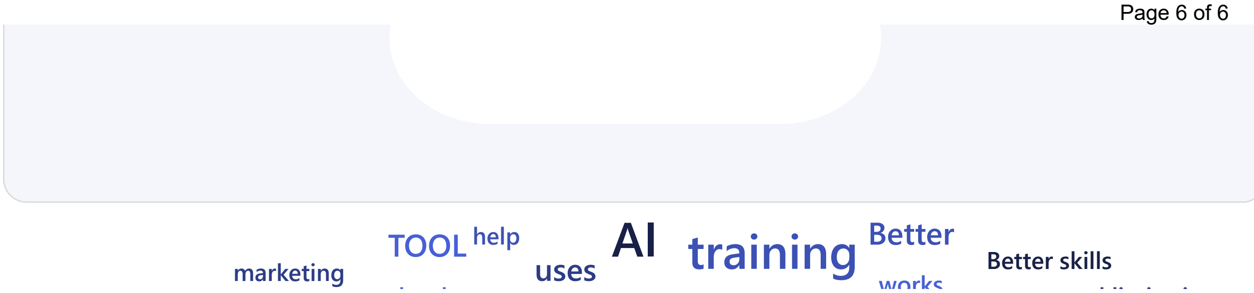
"training of AI via OEV"

"Construction specific AI technology identification and uses ..."

...

9 respondents (23%) answered AI for this question.




marketing
TOOL
help
uses
AI
training
Better
Better skills
works

Collaboration Agreement between The Tallahassee-Leon County Office Of Economic Vitality and Nub8

In the City of Tallahassee, Florida, on the 2nd day of July, 2026, **ON ONE HAND**: the Tallahassee-Leon County Office of Economic Vitality (hereinafter "OEV"), a division of the consolidated Department of Planning, Land Management, and Community Enhancement (PLACE), jointly governed by the City of Tallahassee and Leon County through the Intergovernmental Agency Board, represented in this act by Keith Bowers, Director, with offices located at 315 S. Calhoun Street, Suite 110 Tallahassee, FL 32301; **AND ON THE OTHER HAND:** NUB8 (hereinafter "Nub8"), represented by Federico Decia Martinez, Legal Representative, with offices located at 1111 Brickell Ave, Floor 10, Miami Florida, 33131; the parties agree to enter into this Collaboration Agreement under the following terms and conditions:

FIRST: BACKGROUND

A. TALLAHASSEE-LEON COUNTY OFFICE OF ECONOMIC VITALITY (OEV)

The Tallahassee-Leon County Office of Economic Vitality (OEV) is the central economic development hub and the economic development organization of record for Tallahassee-Leon County, Florida. Established on February 29, 2016, OEV was created as a joint initiative between the City of Tallahassee and Leon County, operating within the consolidated Department of Planning, Land Management, and Community Enhancement (PLACE).

OEV serves as a one-stop-shop that coordinates economic development efforts among community partners, implements the Tallahassee-Leon County Economic Development Strategic Plan, and drives the region's economic competitiveness. Its principal programs and services include:

- **Business Advising:** The Business Development Division provides personalized guidance on business growth, site selection, retention, and expansion, connecting entrepreneurs and companies with the resources they need to succeed.
- **Financing & Grants:** OEV manages a wide variety of state and local funding and support options to help businesses access capital for research, relocation, training, and staffing needs.
- **Research Services & Data Center:** OEV tracks over 80 economic metrics, including employment, taxable sales, and GDP, making them available to businesses and investors for data-driven decision-making.
- **Minority, Women, and Small Business Enterprise (MWSBE) Program**: OEV administers certification and support programs to empower minority, women, and small business owners with equitable access to procurement opportunities.

- **Talent Development:** Through workforce development partnerships and the annual Leon Works Expo, OEV connects businesses with the skilled talent needed to grow and compete.
- **Targeted Industry Development:** OEV supports key growth sectors including technology, defense and national security, life sciences, professional services, and supply chain/logistics.

OEV's central objective is to foster a business-friendly environment that promotes job creation, business formation, and economic inclusion across Tallahassee-Leon County, maximizing the community's competitiveness as Florida's capital and the "Magnetic Capital of the World."

B. NUB8

Nub8 is a company specialized in the design, development, implementation, operation, and management of Cloud, Data, and Artificial Intelligence solutions throughout their entire lifecycle, with the purpose of solving business challenges and generating sustainable value for its clients. Nub8 is an AWS Advanced Tier Services Partner, with expertise in cloud adoption, migration, modernization, and workload optimization, as well as data analytics and AI-powered applications aimed at transforming customer experience.

As part of its portfolio, Nub8 offers the following solutions:

- AI Assistants for the automation of customer interaction and response through digital channels.
- 360 Customer Dashboards, integrating sources such as POS, CRM, website, and social media to build a unified view of the customer.
- Inventory Management and Sales Forecasting, using data analytics and historical data to improve operational planning and reduce stockouts or excess inventory.
- Intelligent Document Processing, automating the extraction of information from documents such as invoices, contracts, and KYC forms.
- The program through which Nub8 delivers AI solutions to local SMBs in partnership with economic development organizations, as described in this Agreement, is referred to herein as the **"Accelerate AI Initiative"** (the "Program").

C. AMAZON WEB SERVICES (AWS)

Amazon Web Services ("AWS") is a global provider of cloud computing services offering infrastructure, platforms, and managed services to enable the creation, migration, modernization, and operation of workloads with high standards of security, scalability, and availability. Nub8 maintains a collaboration relationship with AWS as part of its alliance ecosystem, allowing Nub8 to access capabilities, best practices, programs, and enablement resources to design and implement solutions on AWS aligned with customer needs and applicable technical guidelines.

SECOND: GENERAL OBJECTIVE

To support the economic development mission of the Tallahassee-Leon County Office of Economic Vitality by accelerating the growth and competitiveness of local small and medium-sized businesses (SMBs) in Tallahassee-Leon County through the implementation of accessible, high-impact Artificial Intelligence solutions, powered by Nub8 and Amazon Web Services.

THIRD: SPECIFIC OBJECTIVES

To implement, over the 12-month initial term of this Agreement, the following AI solutions in up to 120 local businesses selected by OEV across eligible industry sectors, at a target pace of up to ten (10) businesses per month. Note: The monthly number of participating businesses may vary depending on seasonality, industry availability, and program capacity, provided the overall pace remains aligned with this target over the term of the Agreement.

1. AI Assistant

An artificial intelligence-based solution that enables businesses to automate the handling and response of customer inquiries through digital channels. It facilitates interaction management, improves service availability, and helps optimize commercial communication and support processes.

2. Inventory Management and Sales Forecasting

An analytics tool that uses historical data to estimate future sales trends and inventory needs. It supports operational planning, improves decision-making, and reduces inefficiencies associated with overstocking or product shortages.

3. 360 Customer Dashboards

A solution that integrates information from multiple sources to build a unified view of customers. It enables the analysis of customer behaviors, supports commercial strategies, and improves customer relationships through a more efficient use of available data.

4. Intelligent Document Processing

A solution designed to automate the extraction and processing of information contained in digital documents such as invoices, contracts, or other forms. It reduces manual tasks, minimizes errors, and improves operational efficiency.

Additional specific objectives of this Collaboration Agreement include:

- Deploy accessible technology that enables local businesses to grow, professionalize their operations, and reach more customers.

- Strengthen OEV's business assistance programs by adding an AI adoption pathway aligned with the Tallahassee-Leon County Economic Development Strategic Plan.
- Contribute to the economic diversification and competitiveness of Tallahassee-Leon County through practical, results-oriented AI implementation.

- Each participating business shall receive one (1) AI solution selected from the options listed above, based on a needs assessment conducted jointly by Nub8 and OEV prior to implementation, considering the business's operational profile, sector, and readiness. No single business shall be enrolled in more than one solution under this Agreement.

FOURTH: OBLIGATIONS OF NUB8

- Provide the technology platform and cloud services through its partnership with Amazon Web Services ("AWS").
- Bring visibility, best practices, and strategic support through its partnership with Amazon Web Services ("AWS").
- Design and implement the AI solutions for the businesses selected by OEV.
- Support selected businesses in the adoption of each chosen AI solution through advisory services, monitoring, and ongoing technical support.
- Measure results and report impact to OEV on a monthly basis, including progress indicators, adoption metrics, and business outcomes.
- Maintain confidentiality of all information related to OEV and the participating businesses.

FIFTH: OBLIGATIONS OF THE TALLAHASSEE-LEON COUNTY OFFICE OF ECONOMIC VITALITY

- Convene and select local business participants through OEV's established programs, networks, and outreach channels, prioritizing businesses aligned with the Economic Development Strategic Plan's goals.
- Facilitate institutional coordination and communication with selected businesses within the framework of this Collaboration Agreement.
- Provide institutional accompaniment and support to the selected businesses throughout the program duration to help ensure the success of the initiative.
- Promote the Accelerate AI program as a tool for economic development for the Tallahassee-Leon County business community.
- Designate an OEV point of contact to serve on the Joint Oversight Committee described in Clause Seventh.

SIXTH: COMPLEMENTARY AGREEMENTS

By mutual agreement, the parties may request the participation of other public or private entities for the execution and financing of activities covered under this Agreement, as well as enter into any other specific agreement within their respective competencies. Any such additional agreements shall be documented in writing and annexed to this Agreement as supplements.

SEVENTH: PROGRAM SUPERVISION AND JOINT OVERSIGHT COMMITTEE

For the purpose of evaluating and coordinating the progress of this Agreement, and of introducing any necessary adjustments by mutual consent, each party shall designate one (1) responsible representative to form a Joint Oversight Committee. This Committee shall be responsible for monitoring the progress of all activities under this Agreement and reporting to OEV and Nub8 no less than once per month. The Committee shall also convene a formal quarterly review to assess program outcomes and discuss any adjustments to the scope, timeline, or list of participating businesses.

EIGHTH: TERM AND DURATION

This Agreement shall enter into force on the date of its execution indicated above. Notwithstanding the foregoing, the initial term of twelve (12) months referenced in this Agreement shall commence on the Project Start Date of the 1st day of September, 2026 (the date on which the first business cohort begins), and shall remain in effect for twelve (12) months from that date, automatically renewable for successive annual periods, unless either party provides written notice of its intention not to renew at least sixty (60) calendar days prior to the expiration date of the then-current term.

NINTH: PERSONNEL INDEPENDENCE

The technical staff and other personnel of Nub8 shall remain under the sole responsibility and direction of Nub8 and shall have no employment, functional, or legal relationship whatsoever with the Tallahassee-Leon County Office of Economic Vitality, the City of Tallahassee, Leon County, or any other governmental entity. Each party shall be solely responsible for the compensation, benefits, and legal compliance of its own personnel.

TENTH: DEFAULT AND TERMINATION FOR CAUSE

In the event of a material breach of any obligation under this Agreement by either party, the non-breaching party shall provide written notice of the alleged breach. The breaching party shall have thirty (30) calendar days from receipt of such notice to cure the breach. If the breach is not cured within that period, the non-breaching party may terminate this Agreement by written notice, without liability for damages arising from such termination. Termination for cause shall not preclude either party from pursuing any available legal remedies.

ELEVENTH: DISPUTE RESOLUTION

Any dispute arising from the interpretation, application, or execution of this Agreement, or from any document derived from its execution, shall first be communicated to the other party in writing via the email addresses specified in this Agreement. The parties shall endeavor to resolve such disputes through good-faith direct negotiation within thirty (30) days of written notification. If no resolution is reached through direct negotiation, the parties agree to seek mediation before pursuing any other remedy.

TWELFTH: COMMUNICATIONS AND SPECIAL ADDRESSES

For all purposes arising from this Agreement, the parties designate the following as their official addresses and contacts for notice purposes. Written notices delivered to these addresses — including by email with confirmation of receipt — shall be deemed valid and effective:

FOR THE TALLAHASSEE-LEON COUNTY OFFICE OF ECONOMIC VITALITY:
Keith Bowers, Director
Tallahassee-Leon County Office of Economic Vitality
315 S. Calhoun Street, Suite 110
Tallahassee, FL 32301
Email: kbowers@oevforbusiness.org

FOR NUB8:
Federico Decia Martinez, Legal Representative
1111 Brickell Ave, Floor 10, Miami Florida, 33131
Nub8
Email: fdecia@nub8.net

THIRTEENTH: PROGRAM FUNDING

The costs associated with the design and implementation of AI solutions delivered to participating businesses under this Agreement shall be covered through Nub8's partnership and funding arrangements with Amazon Web Services ("AWS"). OEV and participating businesses shall have no financial obligation to Nub8 in connection with the design and implementation of program services.

Following the completion of implementation, each participating business shall be solely responsible for the ongoing monthly costs of the AWS cloud services hosting its solution. These costs shall be billed directly to each business according to actual AWS service consumption.

AWS may, at its sole discretion, provide additional support in the form of AWS credits to participating businesses. Such credits, if granted, may be applied toward the monthly AWS hosting costs described above. The availability, amount, and duration of any AWS credits are not guaranteed and shall not constitute a financial obligation of Nub8 or OEV under this Agreement.

Any modifications, customizations, or enhancements requested by a participating business beyond the scope of the standard solution delivered under this Program shall not be covered by program funding and shall be billed separately by Nub8 to the requesting business as customized professional services, under a separate written agreement between Nub8 and that business. OEV shall have no obligation or liability in connection with any such customized services arrangements.

Any changes to the funding model described in this clause shall be documented in a written amendment signed by both parties prior to taking effect.

FOURTEENTH: INTELLECTUAL PROPERTY

All intellectual property developed by Nub8 in connection with this Agreement — including but not limited to AI models, software configurations, algorithms, workflows, integrations, and technical documentation — shall remain the sole and exclusive property of Nub8. OEV shall have no ownership interest in any such intellectual property. Each participating business shall receive a limited, non-exclusive, non-transferable license to use the AI solution implemented for it under this program, solely for its internal business operations and for the duration of the program. Upon expiration or termination of this Agreement, continuation of any solution shall be subject to a separate written agreement between Nub8 and the relevant business. OEV and participating businesses shall not reverse-engineer, copy, sublicense, or otherwise exploit any solution or component thereof beyond the scope of this license.

FIFTEENTH: GOVERNING LAW AND JURISDICTION

This Agreement shall be governed by and construed in accordance with the laws of the State of Florida, without regard to its conflict of laws principles. Any dispute not resolved through the procedures set forth in Clause Eleventh shall be submitted to the exclusive jurisdiction of the state or federal courts located in Leon County, Florida. Each party irrevocably consents to personal jurisdiction and venue in such courts and waives any objection based on improper venue or inconvenient forum.

IN WITNESS WHEREOF, the duly authorized representatives of the parties have executed this Collaboration Agreement in two (2) original counterparts of equal force and effect, on the date and at the place indicated above.

Keith Bowers

Keith Bowers
Director
Tallahassee-Leon County Office of Economic Vitality

Federico Decia

Federico Decia Martinez
Legal Representative
Nub8

3D Construction Printing	3D Print	Access	Ahab
AIE	Alexander	Alpha	Alvin
Amazon-hassee	Apollo	Apop	Avion
AWS	Azul	Azul 3D	Banner
Big Ben	Big Chem	Blackbird	Brown Silver
Bugatti	Bull	Campus	Cavendish
CBS	Chilly Business	Chipmunk	Clean
Clover	Cold Storage Development	Compass	Concrete Polish
Cooler	Cosylab	Crown	Custom Cannabinoid
Cypress	Dorothy	Dr Beehive	Duke
E-Boat	Echo	Eclipse	Egret
Electric Vehicles	Energon	Engineering the Future	EquipmentShare
Falcon	Fast Fulfillment	FBO	Fenway
Filming Florida	First	First Class Build	Flavorful Future
Fox	Fueling the Flight	Galaxy	Genesis
Glove Story	Gold	Grail	Green
Green Harvest	Greenlight	Guard	Guten
HDG Hotel	Heavy Metal	Hedron	Hitch
IDC - TLH Airport	Indra	Insert	Intelligent
Ironman	Javelin	Jem	Juggernaut
KA Tools	Kap	Kars	Kong 2025
Ladder Company	Lane	Leaf	Life
Line	Long Haul	Longleaf	Loop
Mango	Margarita	Marketing Co	Match
Matrix	Mega Materials	Memos	Metal Fab
MGL	Michelangelo	Minecraft	Modern Farming
Molecule	Morgan	Movement	Music
Neutral	New Steel	Nightcrawler	Parkshore

Pegasus	Pelican	Petra	Pharm to Table
Phil	Phone	Phoenix	Polar
Ponsse North America	Power Up	Presidential	Prestige
Quatro	Quiksilver	Rain	Rainbow Brite
Ranger	Ratchet	Ray	Red Baron
Red Hills	Renegade	Renaissance	Revere
Rhino	Ribbon	RipJet	Rise
Robin	RoboCop	Rose	Ryan
Sanders	Santa	Scope	Shamrock
Silverhawks	Skyforge	Smile	Spectrum
Steel Housing	Storm	SunRISE	Sunrise
SunSHINE	Taz	Telula	Tesla
Test Tube	Thomas	TSC Athletics	Up
Upcycle	USDA	Vertigo	Violet
Volkswagen	Vortex	Waterfall	Whirlwind
Woodhaven	X	Zelda	

Blueprint Intergovernmental Agency Board of Directors

Agenda Item #5

September 24, 2026

Title:	Approval of Appointments and Reappointments to the Economic Vitality Leadership Council
Category:	Consent
Intergovernmental Management Committee	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, Department of PLACE Susan Dawson, Blueprint Attorney Keith Bowers, Director, Office of Economic Vitality

STATEMENT OF ISSUE:

This item seeks the Blueprint Intergovernmental Agency Board of Directors (IA Board) approval of eight new appointments and two reappointments to the Economic Vitality Leadership Council (EVLC). The EVLC is the 14-member advisory body that the IA Board established in 2017 to advise the Office of Economic Vitality (OEV) and the IA Board on economic development matters. Eight of the EVLC's 14 seats are currently open because five members' terms have expired, two members have resigned, and one seat is vacant. Two additional members have completed a first term and are eligible for a second. The EVLC Bylaws, which the IA Board adopted, establish a two-step process for filling seats: OEV staff identifies and nominates candidates, and the IA Board makes each appointment. Consistent with that process, OEV staff has nominated Emily Saras, Marsha Asbury-Turner, Dr. Andrea Friall, Kay Ignacio, Justin Varn, Jay Morrell, Andrew Harrison, and Allyson Watson for the IA Board's consideration to fill the eight open seats, each for a three-year term, and recommends that Adrienne Johnson and Kimberly Crowell be reappointed to a second and final three-year term.

FISCAL IMPACT:

This item does not have a budgetary impact.

RECOMMENDED ACTION:

Option 1: Appoint Emily Saras, Marsha Asbury-Turner, Dr. Andrea Friall, Kay Ignacio, Justin Varn, Jay Morrell, Andrew Harrison, and Allyson Watson to the Economic Vitality Leadership Council, each to serve a three-year term; and reappoint Adrienne Johnson and Kimberly Crowell to the Economic Vitality Leadership Council, each to serve a second and final three-year term.

ECONOMIC DEVELOPMENT STRATEGIC PLAN:

The EVLC was created in accordance with the 2017 Second Addendum to the Second Amended and Restated Interlocal Agreement, the agreement between Leon County and the City of Tallahassee that governs the Blueprint Intergovernmental Agency and OEV. The EVLC advises and works with OEV staff to carry out the *Economic Development Strategic Plan* (2022), the plan that sets Tallahassee-Leon County's economic development priorities. The Plan's core and enabling strategies are: Increasing the reach and results of OEV's programs; Recruiting new businesses and retaining and expanding existing ones; Supporting the growth of minority-, women-, and small-business enterprises; Encouraging entrepreneurship and the formation of new businesses; and Leveraging the community's existing economic assets.

SUPPLEMENTAL INFORMATION:

This item seeks IA Board approval of eight new appointments and two reappointments to the EVLC. To provide the basis for that action, this section first describes what the EVLC is and what its members do; second, explains how EVLC members are appointed under the EVLC Bylaws; third, identifies the eight seats that are open and why; and fourth, presents OEV staff's nominee for each open seat and the two members recommended for a second term.

The EVLC serves in an advisory capacity to OEV and the IA Board. It was created under the 2017 Second Addendum to the Second Amended and Restated Interlocal Agreement, and it carries out a recommendation in Section C of the first *Economic Development Strategic Plan* (2016), titled *Engaging the Community through a New Advisory Structure*, that the community's business leaders be engaged through a standing advisory group. The EVLC advises; it does not approve funding, enter into agreements, or direct staff. Those decisions remain with the IA Board.

EVLC members are business and institutional leaders drawn from the industries that OEV works with. The EVLC has met quarterly since 2017. At those meetings, members review OEV's programs, incentives, and results; describe, from the standpoint of their own industries, what local businesses need to start, stay, and grow in Tallahassee-Leon County; and advise OEV staff on how OEV's programs can better meet those needs. Between meetings, members carry information about OEV's programs back to the businesses and organizations in their industries and bring those businesses' questions and concerns back to OEV. In this way the EVLC keeps OEV's work informed by the businesses it serves and keeps those businesses informed of what OEV offers. The EVLC's standing charge covers the four areas in which the community competes for economic growth: entrepreneurial and small business growth; new business investment; growth of existing industries; and a workforce with the skills employers need.

The EVLC Bylaws (Attachment #1), which the IA Board approved and last amended on September 27, 2021, set the EVLC's membership and the process for filling seats. The EVLC has 14 seats, and each seat represents one industry sector or business area: Workforce Development; Entrepreneurial Business; Major Employer; Economic Development; Financial Sector; Higher Education; Advanced Manufacturing; Healthcare; Applied Science; Information Technology/Professional Services; Non-Profit; Small Business; one At-Large seat that is not tied to a particular industry; and the Chairperson of the Minority, Women, and Small Business Enterprise Citizens Advisory Committee (MWSBE CAC), the citizen committee that advises the IA Board on OEV's program for minority-, women-, and small-business enterprises.

Senate Bill 1134 takes effect January 1, 2027, and on that date the MWSBE Program ends. The proposed Small Business Enterprise (SBE) program, Item #7 on this agenda, provides the race- and gender-neutral SBE Program that, with IA Board approval, replaces the MWSBE Program. The transition reaches the EVLC through one seat, the one held by the Chairperson of the MWSBE CAC. Staff will present to the IA Board, at the November 12, 2026, meeting, the action reconstituting the MWSBE CAC as the citizens advisory committee for the SBE Program, effective January 1, 2027, together with the conforming amendment to the EVLC Bylaws. On that date, the seat passes from the Chairperson of the MWSBE CAC to the Chairperson of the reconstituted committee. Until then, the Chairperson of the MWSBE CAC continues to hold the seat. No vacancy on the EVLC results from the transition, and the appointments in this item are not affected.

The current membership roster is provided as Attachment #2. Under the Bylaws, EVLC members are appointed by the IA Board for three-year terms, and no member may serve more than two consecutive terms. Section 3.3 of the Bylaws sets out the two-step process for filling a seat: OEV staff, which works with the business community daily, identifies and nominates candidates for each seat, and the IA Board, as the appointing authority, considers each nominee and makes the appointment. Each individual presented in this item has been nominated by OEV staff in accordance with that process and is before the IA Board for appointment.

Eight of the 14 seats are open. Six seats are open because the members' three-year terms have expired: Dr. Temple Robinson (Healthcare), Katrina Rolle (Non-Profit), Mindy Perkins (Information Technology/Professional Services), Cissy Proctor (Economic Development), Richard Darabi (At Large) and Mark O'Bryant (Major Employer). Two seats are open because the members resigned: Sam Varn (Advanced Manufacturing) and Tom Barron (Financial Sector). In addition, two members have completed their first three-year term, are eligible under the Bylaws for a second and final term and are seeking reappointment: Adrienne Johnson (Workforce Development) and Kimberly Crowell (Entrepreneurial Business).

OEV Nominees

To replace the out-going members on the EVLC, the OEV recommends to the IA Board the individuals, as reflected in Table 1 below, to represent the industry or business sector seats that are now vacant on the EVLC. Resumes, CVs, or bios for the recommended new appointees are included in Attachment #3.

Table 1. Recommended New Appointees to EVLC

Sector:	Former Member:	OEV Recommendation
IT/Professional Services	Mindy Perkins (Resigned)	Emily Saras
Economic Development	Cissy Proctor (Resigned)	Marsha Asbury-Turner
Healthcare	Dr. Temple Robinson (Term Expired)	Dr. Andrea Friall
Non-profit Sector	Katrina Rolle (Term Expired)	Kay Ignacio
Advanced Manufacturing	Sam Varn (Resigned)	Justin Varn
At-Large	Richard Darabi (Term Expired)	Jay Morrell
Financial Sector	Tom Barron (Resigned)	Andrew Harrison
Major Employer	Mark O'Bryant (Term Expired)	Allyson Watson

OEV also recommends that the two members shown in Table 2 below, be reappointed to a second and final three-year term. Each has completed one full term and remains eligible under the two-term limit in the Bylaws.

Table 2. Recommended Reappointments to EVLC

Sector:	Member:	OEV Recommendation
Workforce Development	Adrienne Johnson	Reappoint
Entrepreneurial Business	Kimberly Crowell	Reappoint

In summary, the EVLC is the 14-member body through which the IA Board and OEV receive the advice of the community's business and institutional leaders on economic development. Under the EVLC Bylaws, OEV staff nominates candidates, and the IA Board appoints members for three-year terms of no more than two consecutive terms. Eight seats are open through expired terms and resignations, and two members have completed a first term and are eligible for a second. OEV staff nominated an individual for each open seat, whose background is provided in Attachment #3, and nominated both eligible members for reappointment. Approval of Option #1 fills all open seats, follows the process set out in the Bylaws, and allows the EVLC to continue its work with OEV at full membership.

OPTIONS:

Option 1: Appoint Emily Saras, Marsha Asbury-Turner, Dr. Andrea Friall, Kay Ignacio, Justin Varn, Jay Morrell, Andrew Harrison, and Allyson Watson to each serve a three-year term on the Economic Vitality Leadership Council; and reappoint Adrienne Johnson and Kimberly Crowell to a second and final three-year term on the Economic Vitality Leadership Council.

Option 2: IA Board direction.

RECOMMENDED ACTION:

Option 1: Appoint Emily Saras, Marsha Asbury-Turner, Dr. Andrea Friall, Kay Ignacio, Justin Varn, Jay Morrell, Andrew Harrison, and Allyson Watson to each serve a three-year term on the Economic Vitality Leadership Council; and reappoint Adrienne Johnson and Kimberly Crowell to a second and final three-year term on the Economic Vitality Leadership Council.

Attachments

1. EVLC Bylaws, Policies, and Procedures
2. Current EVLC Membership Roster
3. Nominees' CVs, resumes or bios

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OFFICE OF ECONOMIC VITALITY LEADERSHIP COUNCIL

BYLAWS, POLICIES, AND PROCEDURES

ADOPTED July 20, 2017

1. PREAMBLE

The Tallahassee-Leon County Office of Economic (OEV) Vitality Leadership Council (EVLC) has been created in accordance with the Interlocal Agreement, dated December 9, 2015, as may be amended from time to time, between the Tallahassee City Commission and Leon County Board of County Commissioners ("Interlocal Agreement"), and the one cent sales tax extension referendum approved by the voters at the November 4, 2014, General Election. The intent of these Bylaws, Policies, and Procedures is to provide guidance for the operation of the EVLC to ensure the accomplishment of objectives identified in the Economic Development Strategic Plan and as assigned by the Blueprint Intergovernmental Agency Board of Directors ("the Board"), consistent with the language and intent of the referendum approved by the voters.

2. EVLC PURPOSE AND FUNCTION

2.1. The EVLC shall fulfill its responsibilities to the citizens of Tallahassee-Leon County in accordance with the Economic Development Strategic Plan approved by the Board.

2.2. The role of the EVLC is to serve in an advisory capacity to the OEV.

2.3. The EVLC shall continually look at Tallahassee-Leon County's ability to be competitive in each of the six identified economic development areas of focus (business formation, technology and commercialization, business retention and expansion, business recruitment, talent development, and the creative economy) as well as the community overall.

2.4. To carry out its function as an advisory committee to the OEV, the EVLC shall:

2.4.1. Encourage knowledge of all local programs and collaboration across each.

2.4.2. Recommend improvements for competitiveness.

2.4.3. Outline a plan to increase the community's ability to compete across the six identified economic development initiatives and overall as a community.

3. EVLC MEMBERSHIP

3.1. EVLC membership is established in the Interlocal Agreement, setting forth the minimum standards for the EVLC, which shall be comprised of the following:

3.1.1. One (1) major employer representative

3.1.2. One (1) institute of higher education representative

3.1.3. One (1) entrepreneurial business representative or a representative from that community

3.1.4. One (1) financial sector representative

3.1.5. One (1) economic development representative

3.1.6. One (1) workforce development representative

3.1.7. One (1) at-large member

3.1.8. One (1) MWSBE CAC Chairperson

- 3.1.9. One (1) advanced manufacturing representative
- 3.1.10. One (1) healthcare representative
- 3.1.11. One (1) applied science representative (Magnetic Taskforce Chair)
- 3.1.12. One (1) professional services representative
- 3.1.13. One (1) non-profit representative
- 3.1.14. One (1) small business representative

3.2. The Director of PLACE and the Director of OEV shall serve as ex officio non-voting members. Upon the recommendation of the Director of OEV, and majority vote of the EVLC, the Director of OEV may appoint former EVLC members to serve as non-voting subject matter experts to assist the EVLC with special projects or to serve as a resource to the EVLC. The subject matter experts are not required to be appointed by the Board.

3.3. The appointment of EVLC members shall be made by the Board. In order to be eligible for appointment by the Board, a person must be nominated by OEV staff. It is the intention that the makeup of the EVLC be representative of the diversity of the businesses and organizations in Tallahassee-Leon County. EVLC members serve at the pleasure of the Board.

3.4. EVLC members are appointed for three-year terms. If a member wishes to no longer serve on the EVLC, or is removed from the EVLC, the Board shall appoint a replacement from the membership category from which the member was nominated.

3.5. The initial terms for members appointed by the Board in 2017 shall be staggered in two and three year terms so that memberships will not expire concurrently. The initial term for members appointed by the Board in 2020 shall be for a period of three years. The term for members whose term expires in 2021 shall be extended by one year.

3.6. Memberships are subject to a two consecutive-term limitation.

3.7. If more than one person is nominated to serve as a representative for a membership category, OEV staff will review the nominations and provide a recommendation to the Board.

4. VACANCIES

A member's position shall become vacant when:

4.1. A member is absent from 33% of scheduled meetings in a given calendar year, regardless if such absence is excused or unexcused. All absences will be duly recorded in the meeting minutes. Absences from emergency or special called meetings will not be recorded against a member in calculating the percent of absences. However, attendance at emergency or special called meetings may be used to offset absences from regularly scheduled meetings. Special exceptions on the removal of members for absences may be made by the Director of PLACE when the absences are due to health or time-limited extenuating circumstances and the absences do not affect the ability of the council to maintain quorum; or

4.2. When a member no longer meets eligibility requirements; or

4.3. When a member's term expires; or

4.4. When a member resigns.

VOTING

5.1. Each member of the EVLC shall have one vote.

5.2. Proxy votes and absentee ballots shall not be permitted.

6. EVLC OFFICERS, ELECTIONS, AND DUTIES

6.1. The Chair of the EVLC shall also serve as the At-Large member of the Competitive Projects Cabinet.

6.2. The Chairperson and Vice-Chairperson shall be elected by a majority of the votes of EVLC members present.

6.3. The Chairperson shall serve as Chair for a period of one year effective January 1 of each year. At the last meeting of the EVLC each year, a new Vice-Chairperson shall be elected for a term of two years, the first to serve as the Vice-Chairperson and the second year as the Chairperson. Nominations for the Vice-Chairperson shall be made at the meeting.

6.4. The EVLC Chairperson shall preside at all meetings. In the event of the absence of the Chairperson, or at his/her direction, the Vice-Chairperson shall assume the authority and duties of the Chairperson. In the event that neither the Chairperson nor Vice-Chairperson can preside at the meeting, the EVLC members shall elect one of its members to serve as temporary Chairperson for the meeting.

6.5. In the event that either the Chairperson or the Vice-Chairperson position becomes vacant, a replacement shall be elected at the next scheduled EVLC meeting for immediate assumption of duties and shall hold the position for the remainder of the calendar year.

7. EVLC MEETINGS AND AGENDAS

7.1. The EVLC shall meet quarterly at times and places as approved by the EVLC Chair in consultation with OEV staff.

7.2. Meeting dates and times may be changed to accommodate holidays or for other valid reasons.

7.3. Every attempt shall be made to send agenda packages to EVLC members seven (7) days prior to a regular EVLC meeting.

7.4. There shall be an official agenda for every EVLC meeting. The agenda shall be prepared by OEV staff.

7.5. The agenda and supporting information for each EVLC meeting shall be prepared and emailed to each member.

7.6. Any EVLC member, the Board, or OEV staff may place additional items on the EVLC agenda, with the approval of the Director of OEV.

8. OFFICIAL ACTIONS

8.1. All official actions of the EVLC shall require a quorum, and shall be upon motion and affirmative vote of a majority of those voting members present.

8.2. All official and formal positions of the EVLC, regardless of whether adopted or rejected, shall be recorded in the minutes. Verbatim minutes are not required, but minutes shall include an accurate summary of discussions and actions taken.

9. CONDUCT OF MEETING

9.1. All EVLC meetings shall be conducted under the requirements of the Florida "Government in the Sunshine" law and be open and accessible to the public.

9.2. The public will have the right to speak at EVLC meetings in accordance with section 286.0114, Florida Statutes.

9.3. In the absence of rules covered in this document, Roberts Rules of Order shall govern all EVLC meetings.

9.4. A quorum for EVLC meetings shall consist of a majority of current members appointed to the EVLC.

9.5. Any EVLC member who has a conflict of interest on any particular matter shall declare the conflict of interest before discussion and a vote is taken and shall abstain from voting on that issue.

9.6. As related to members who cannot physically attend the EVLC meeting, the EVLC will utilize, as appropriate, the intent of the "Telephonic Participation in Agency Meetings Policy" (Policy 105) as adopted by the Board on February 16, 2004. The following specific items are noted:

9.6.1. A member participating telephonically will not count in the determination of a quorum;

9.6.2. A member participating telephonically shall be able to vote as required and in accordance with the Bylaws;

9.6.3. Only two members may participate telephonically at any meeting.

9.7. The Director of PLACE or the Director of OEV shall preside at all meetings of the EVLC and shall direct the EVLC with regard to its purpose, function, goals, and responsibilities.

10. ADMINISTRATION

10.1. Meetings shall be held quarterly at dates, times, and places approved by the EVLC Chair in consultation with OEV staff.

10.2. Meeting dates, times, and places shall be provided to the City Communications Department and County Public Information Office, and will be made available at www.OEVforBusiness.org.

10.3. A special meeting may be called by the Director of PLACE or Director of OEV. Each member of the EVLC shall receive a notification of such special meeting, stating the date, hour, and place of the meeting, and the purpose for which the meeting is called.

10.4. An emergency meeting may be called by the Director of PLACE or Director of OEV when an emergency exists which requires immediate action by the EVLC. When such a meeting is called, each member shall be notified, stating the date, hour, and place of meeting, and the purpose for which it is called, and no other business shall be transacted at that meeting. At least a twenty-four (24) hour advance notice of such emergency meeting shall be given before the time the meeting is held.

10.5. If, after reasonable diligence, it becomes impossible to give notice to each EVLC member, such failure shall not affect the legality of the emergency meeting, if a quorum is present.

10.6. The Director of PLACE and the Director of OEV shall serve as ex officio non-voting members of the EVLC.

10.7. OEV staff shall be responsible for the preparation and recording of minutes of all EVLC meetings and all notices and agendas for the EVLC meetings.

10.8. The Director of PLACE and Director of OEV shall transmit EVLC's decisions or recommendations to the Board by incorporating such decisions or recommendations into the applicable agenda item at the next available meeting.

11. AMENDMENT

11.1. These bylaws may be amended from time to time, upon a two-thirds vote of those voting members present at a regularly scheduled EVLC meeting.

11.2. Amendments to the bylaws shall become effective immediately after the approval of the Board.

12. EFFECTIVE DATE

12.1. These Bylaws, Policies, and Procedures shall become effective immediately upon approval of the Board.

Revised:

July 9, 2020

September 27, 2021

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OFFICE OF ECONOMIC VITALITY

Economic Vitality Leadership Council Membership

No.	Position	Member	Industry Sector	Organization	1st Term	2nd Term
1	Member, Vacant		IT/Professional Services			
2	MWSBE CAC Chair	Tracey Cohen	MWSBE	Target Print & Mail	*Based on MWSBE CAC Chairmanship*	
3	Member	Adrienne Johnson	Workforce Development	CareerSource Florida	November 2022 – November 2025	
4	Member	Valerie McDevitt	Institution of Higher Education	Florida State University	May 2024 – May 2027	
5	Member, Vacant		Economic Development			
6	Chair	Dr. Temple Robinson, MD	Healthcare	Bond Community Health Center	July 2020 – July 2023	July 2023 – July 2026
7	Member	Terry Simpkins	Small Business	National Flooring	May 2024 – May 2027	
8	Vice Chair	Katrina Rolle	Non-profit Sector	Community Foundation of North FL	July 2020 – July 2023	July 2023 – July 2026

No.	Position	Member	Industry Sector	Organization	1st Term	2nd Term
9	Member	Kimberly Crowell	Entrepreneurial Business	KALO Companies	November 2022 – November 2025	
10	Member, Vacant		Major Employer			
11	Member	Sam Varn	Advanced Manufacturing	Awards4U	May 2024 – May 2027	
12	Member, Vacant		At-Large			
13	Member	Tom Barron	Financial Sector	Capital City Bank	November 2022 – November 2025	
14	Member	Bill Lickson	Applied Science	Jim Moran College of Entrepreneurship	May 2024 – May 2027	

*Each term is three (3) years. Two (2) consecutive term limitations.

Bylaws: EVLC-Bylaws.pdf

Updated: 5/18/26

EVLC Nominees, CVs, Resumes, or Bios

Emily Šaras, PhD

Emily serves as the CEO and a Data Scientist at Knowli, a data science and research firm based in Tallahassee, FL. She is a Mensa Member and a graduate of Wellesley College (BA), Central European University (MA), Northeastern University (Graduate Studies in Leadership), and Florida State University (MS, PhD). A Leadership Tallahassee Class 41 member, Emily received the Tallahassee 2024 Rotary Ethics in Business Award for her data-driven, person-centered approach to health, human services, and education work. She was named as one of the 2025 25 Women to Know in Tallahassee and one of the 2026 40 Under Forty by the News Service of Florida. Under her leadership, Knowli has achieved a 25% compound annual growth rate in recent years, leading to recognition as 2026 JMI 30 Recipient (Jim Moran Institute) and a 2026 Seminole 100 Award Recipient (Florida State University).

Marsha Asbury – Turner

Marsha serves as a Business Development Officer for North Florida & Panhandle and South Georgia and is based in Tallahassee. Marsha joined Florida First Capital in 2018 and has nearly 20 years of banking experience on both the commercial and retail side. She is a native of Tallahassee and provides comprehensive service throughout the SBA loan process. Prior to joining the company, Marsha served as commercial lender with Prime Meridian Bank, where she worked closely with borrowers in both commercial and consumer lending. She received a B.S. in Finance & Real Estate from Florida State University. Marsha has been involved with her local Rotary Club since 2014, and has served on other local boards throughout her career. Marsha is responsible for the following North Florida & Panhandle counties: Bay, Calhoun, Dixie, Franklin, Gadsden, Gulf, Hamilton, Holmes, Jackson, Jefferson, Lafayette, Leon, Liberty, Madison, Suwannee, Taylor, Wakulla, Walton and Washington. In South Georgia, Marsha covers the following counties: Atkinson, Baker, Berrien, Brooks, Clay, Clinch, Coffee, Colquitt, Cook, Crisp, Decatur, Dougherty, Early, Echols, Grady, Irwin, Lanier, Lee, Lowndes, Miller, Mitchell, Seminole, Terrell, Thomas, Tift, Turner, Ware and Worth.

Andrea K. Friall, MD

Dr. Andrea K. Friall provides expert gynecology care for women in Tallahassee and North Florida. She has cared for women in the community for over 20 years, bringing warmth, skill, and a patient-focused approach to every visit.

Dr. Friall completed her medical training in obstetrics and gynecology and has served the Tallahassee community as a board-certified OB-GYN at North Florida Women's Care since 2001. She specializes in gynecologic care, minimally invasive procedures, and preventive women's health, tailoring treatment to each patient's needs.

Dr. Friall serves as Vice President and Chief Medical Officer at Tallahassee Memorial HealthCare, leading initiatives to improve patient safety, quality, and healthcare outcomes across the region. She also serves as an Associate Clinical Professor at the Florida State University College of Medicine, mentoring future physicians in gynecology and women's health.

She holds Fellow status with the American College of Obstetricians and Gynecologists (FACOG) and advocates for women’s health at both the state and national levels. Her leadership and dedication have earned her multiple community and professional awards.

Dr. Friall focuses exclusively on gynecology, offering comprehensive care for women at every stage of life. She emphasizes compassionate, personalized care, helping patients navigate routine care, complex gynecologic issues, and advanced minimally invasive procedures.

Kay Ignacio (Meyer)

Kay Ignacio is the Chief Executive Officer of 211 Big Bend, Inc., a nonprofit leader dedicated to strengthening connections to critical health and human services across the Big Bend region. Under her leadership, 211 Big Bend has been revitalized through improved financial stability, stronger operations, and a renewed focus on sustainable community impact.

As CEO, Kay leads a lifeline organization connecting individuals and families to mental health support, crisis services, healthcare, housing, and other essential community connections. 211 Big Bend also serves as the 988 Suicide & Crisis Lifeline provider for an eight-county area, providing compassionate support when people need it most.
Known for her positive outlook, collaborative leadership, and commitment to service, Kay is focused on building a stronger future for 211 Big Bend and the communities it serves. She is also a current board member of United Partners for Human Services.

Justin Varn

Justin Varn has been a driving force in the awards and recognition industry since 2011. Over more than a decade with Awards4U, a second-generation company based in Tallahassee, Florida, he contributed to nearly every facet of the business, leading efforts in sales, marketing, IT, shipping, customer relations, and operations. His adaptability and hands-on leadership played a pivotal role in the company's growth, and on January 1, 2025, he officially became owner of Awards4U, ushering in a new era of vision and commitment to excellence. Today, under his leadership, Awards4U has grown into a technology-forward production operation with nearly 40 years of history serving corporate, athletic, and organizational clients, including Florida A&M University and Florida State University, specializing in laser engraving, UV printing, sublimation, and large-scale recognition programs.

Beyond his own company, Justin is deeply engaged in advancing the broader industry. He serves as President and a board member of the Awards & Personalization Association (APA) and chairs the AI Committee for Awards Associates of America (AAA), where he advises approximately 65 of the nation's largest awards companies on AI strategy and delivers keynotes and educational content to business owners at every level of technical experience.

Justin's work focuses on translating AI into tangible operational results: automating order intake, accelerating proof generation, optimizing production scheduling, and building intelligent workflows that reduce friction without sacrificing craftsmanship. His approach is grounded in the belief that AI should amplify the people behind the work, not replace them.

As a second-generation industry professional, Justin brings a rare combination of production expertise, strategic vision, and communication clarity, making him a sought-after voice on practical AI implementation for small and mid-sized businesses. Through his leadership roles, he continues to shape the future of the awards industry, driving innovation and championing best practices for recognition professionals across the country.

Jay Morrell

Morrell is a respected culinary professional, entrepreneur, and co-owner of Early's Kitchen, a beloved local establishment with roots dating back to 1984. Alongside his wife, he purchased the restaurant in 2008, building upon its longstanding tradition while bringing his own vision, leadership, and commitment to serving the community.

Before becoming a small business owner, Morrell served as Executive Chef at Florida A&M University, where he developed his culinary expertise and strengthened a passion for hospitality and service that would ultimately help prepare him for entrepreneurship.

His entrepreneurial spirit, however, was shaped long before his professional career began. The son of migrant farm workers, Morrell grew up traveling the East Coast with his family as they followed the harvest seasons. Those early experiences taught him the value of hard work, perseverance, and taking pride in a job well done. One memory in particular left a lasting impression: watching his father take the initiative to start his own hauling business. Seeing his father create an opportunity for himself planted the seed that Morrell, too, could one day build something of his own.

Today, through Early's Kitchen, Morrell carries those lessons forward—combining culinary excellence, entrepreneurship, and a deep commitment to community. His journey from the son of migrant farm workers to executive chef and successful small business owner reflects the determination, resilience, and entrepreneurial spirit that continue to define his leadership and his legacy.

Andrew Harrison

Andrew "Andy" Harrison is a lifelong Tallahassee native, growing up and attending public school on the Southside of the City. He went on to attend and received his undergraduate and graduate degrees from Florida State University. While at FSU he met his future wife Kristin and after finishing school they tied the knot and have been happily married for 28 years as of this August. Their 2 sons Drew and Trent are currently enrolled as students at FSU keeping up the family tradition and making them 3rd generation Seminoles.

Andy has worked in the Banking and Finance industry for 22 years, 19 of which have been with Bank of America where he specializes in Commercial and Business Banking helping clients to run and grow their businesses through advisory application of financial efficiencies. In the middle of his career in Banking he did take a 6-year hiatus where he served as the Chief of Staff for 1 of our local elected officials on the Leon County Board of County Commissioners. There he learned a great deal about our local governmental structure and just fortunate we are here in Tallahassee / Leon County to have such a strong origination of dedicated public servants working everyday to make our Community the great place that it is to Live, Work and raise a family. Outside of family and work, in his free time Andy enjoys doing pretty much everything outdoors and gardening related, working in his workshop and as an aging soccer player, doing everything he can do to keep playing with his soccer club The Draggins without terribly embarrassing or injuring himself.

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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #6

September 24, 2026

Title:	Acceptance of a Status Update on the Northwest Connector Corridor: Tharpe Street Project and Information on the Process for Blueprint Infrastructure Projects Reprioritization
Category:	General Business
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, PLACE Autumn Calder, Director, Blueprint Susan Dawson, Esq., Blueprint Attorney Martha Hodgson, Project Manager

STATEMENT OF ISSUE:

As requested by the Blueprint Intergovernmental Agency Board of Directors (IA Board) at the June 11, 2026, meeting, this item presents a status update on the Northwest Connector Corridor (NWCC) Tharpe Street project and presents the process for reprioritizing the project for the IA Board's consideration. It addresses the following in the order presented, all of which inform that consideration: (1) the IA Board's prior direction; (2) the project's current status; (3) the project's funding; and (4) the process required to change the priority of this project and what it could mean for the three projects currently prioritized ahead of Tharpe Street in the funding order, including deferring, re-scoping, or not building segments of those projects.

FISCAL IMPACT

This agenda item does not have a fiscal impact.

RECOMMENDED ACTION:

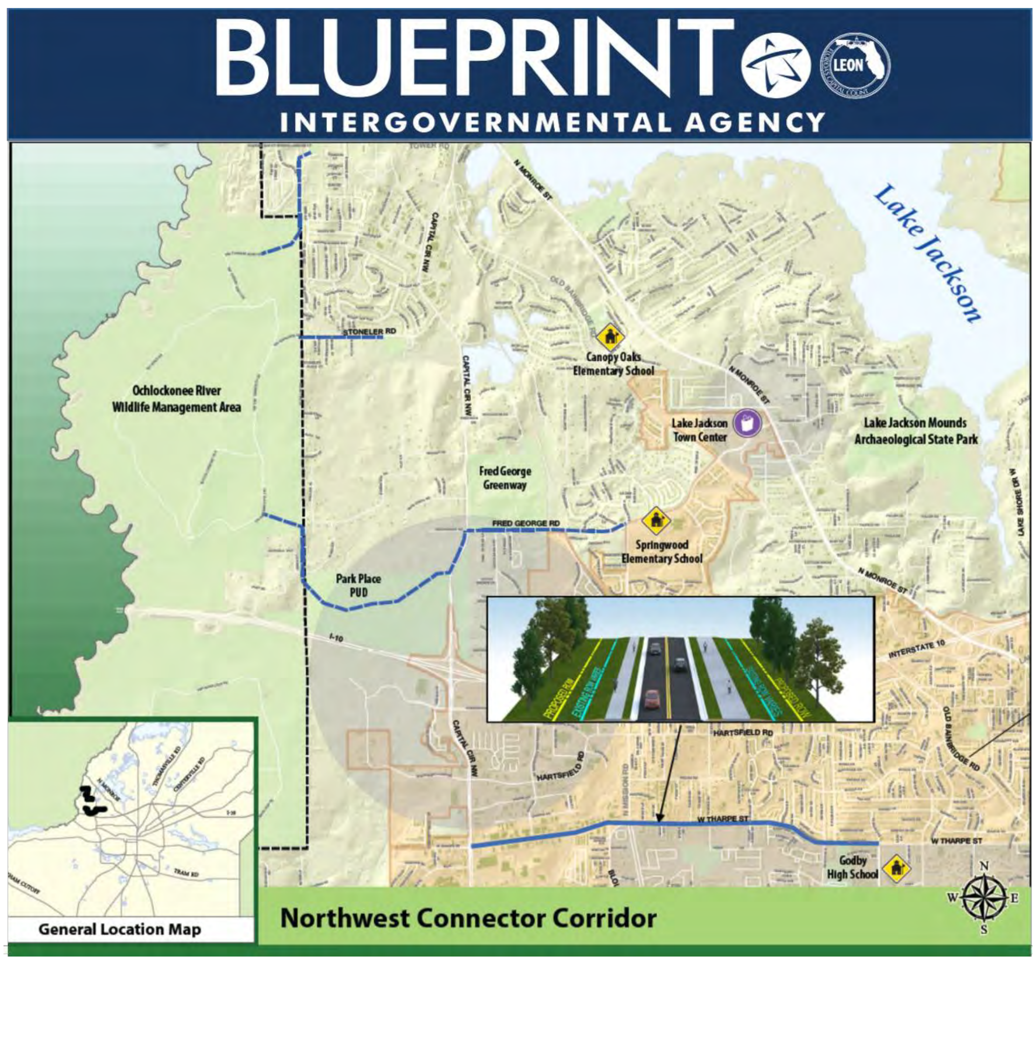
Option #1: Accept the status update on the Northwest Connector Corridor: Tharpe Street project.

SUPPLEMENTAL INFORMATION

Project Overview

The Northwest Connector Corridor (NWCC) Tharpe Street project provides improvements to the 2.61-mile Tharpe Street corridor from Ocala Road to Capital Circle Northwest, as shown in Figure 1 (also included as Attachment #1). Tharpe Street is currently a two-lane, undivided roadway owned and maintained by Leon County (County Road 158). The project will build sidewalks, where most of the corridor has none today; add turn lanes for drivers waiting to turn, so they no longer block traffic behind them; and replace the open ditches with a piped drainage system. The Project Development and Environment (PD&E) Study for the project was completed in May 2026, and the project is now moving into design and permitting. The sections that follow address, in order, the four matters previewed in the Statement of Issue: (1) the IA Board's direction to date; (2) the project's current status and schedule; (3) the project's funding; and (4) the process for reprioritizing Blueprint projects and what reprioritization would mean for this project's schedule and for the other Blueprint roadway projects.

Figure 1: Blueprint Northwest Connector Corridor Project



IA Board Direction to Date

Project progress and funding allocations to date for the NWCC Tharpe Street project are the result of strategies developed and approved by the IA Board through workshops and public hearings. Blueprint has made significant progress in advancing infrastructure projects based on the existing IA Board direction, most specifically the project prioritization and long-term funding and implementation plans. The following history of the project summarizes IA Board direction on Tharpe Street to date.

The project was approved by referendum in November 2014 as one of the 27 Blueprint 2020 Infrastructure projects. The proposed improvements for the project were estimated to cost $53.2 million, an estimate based on generalized costs, not on a PD&E Study or design. As approved in 2014, the project scope was the widening of Tharpe Street to four travel lanes.

In the four years following the November 2014 voter approval of the sales surtax extension, the IA Board provided direction regarding the prioritization of the 27 Blueprint 2020 Infrastructure projects, developed an implementation plan for the first five years of the Blueprint 2020 program that included estimated funding for completion of the remaining Blueprint 2000 projects, and initiated some of the Blueprint 2020 projects through advanced funding in the annual capital budget. Each year, Blueprint provides a five-year capital improvement program (CIP). The annual budget only allocates funding to specific projects for the upcoming fiscal year, and the CIP serves as a planning tool to help manage project funding schedules based on known variables, such as revenue projections and market predictions. Confidence in projections is greater in Year 1 of the CIP compared to Year 5, given the lack of information relative to the amount of time between the forecast and actual conditions.

Projects were categorized as part of the prioritization process, and the NWCC Tharpe Street project was included in the Regional Mobility and Gateways project category. The IA Board's direction on the project's priority, scope, and funding, and Blueprint's implementation of that direction, include the following:

<u>February 21, 2017</u>: At the February 21, 2017, meeting, staff recommended a strategy that projects on state roads would be primarily funded through the Florida Department of Transportation (FDOT) Work Program, leveraging state dollars to implement Blueprint projects like Southside Gateway, Westside Gateway, and Orange Avenue Widening. As a result, the IA Board directed the larger, holistic roadway projects be prioritized consistent with the Capital Region Transportation Planning Agency's (CRTPA) Regional Mobility Plan (RMP). Projects on local roadways were also prioritized through the RMP. State and federal funding for local projects has facilitated numerous Blueprint infrastructure projects moving forward, ensuring Blueprint is well-positioned to partner with FDOT and maximize leveraging opportunities. To ensure these important partnerships continue and maximum leveraging opportunities are achieved, staff recommended the IA Board include the remaining Blueprint projects on state roadways in the RMP.

June 21, 2018: The IA Board held a special workshop on June 21, 2018, to discuss three implementation plan options that addressed funding and project delivery for the first five years of the Blueprint 2020 program, as noted earlier the five year CIP is a planning tool to help manage project funding schedules based on known variables, such as revenue projections and market predictions, and confidence in projections is greater in Year 1 compared to Year 5. At this workshop, staff presented the FY 2019 – 2024 Implementation Plan (Attachment #2), which included $128 million in bond and state infrastructure bank loan financing to fund large-scale Regional Mobility and Gateway projects, including Tharpe Street, as well as the five highest priority Community Enhancement, Connectivity, and Quality of Life (CCQ) projects. The IA Board direction provided at that meeting also included prioritizing funding for the Northeast Connector: Bannerman Road project ahead of funding for the Northwest Corridor: Tharpe Street project allowing Blueprint to capitalize on the significant public and ongoing private investments already made in the area. Leon County completed the PD&E study and 30% design plans for this project in 2012 and started construction in 2015 to complete the first segment of this project from Thomasville Road to Quail Common Drive. Advancing the completion of the remaining portion of this project capitalized on those investments, and also supported the additional vehicles anticipated with increased residential and commercial development along the Bannerman Road corridor.

Advancing the Bannerman Road project placed the Tharpe Street project fourth in priority order for regional mobility and gateway projects behind NE Gateway, Airport Gateway, and NE Connector Corridor Bannerman Road, listed in order. Priority order was established via leveraging opportunities, capitalizing on prior investments, and consistency with the Capital Region Transportation Planning Agency (CRTPA)'s Regional Mobility Plan (RMP). The 2018 Implementation Plan included funding for the Tharpe Street PD&E by FY 2024, which ensured that this project could move forward and be well positioned for grant funding. As discussed in more detail below, this PD&E study was recently completed by Blueprint in May 2026.

May 27, 2021: Facing falling sales surtax revenues from COVID impacts and rising project and interest rates, staff prepared a long-term implementation plan that adjusted for these new market conditions. The 2021 Implementation Plan and Preliminary Project Funding Schedule (Attachment #3) did not change the project priority previously approved by the IA Board; however, it did provide additional funding direction for initiated projects. Specifically, the Tharpe Street project was intentionally positioned to receive leveraged external funding, such as federal grants, for construction by fully funding design and providing partial construction funding by 2030. Blueprint is still progressing the project in accordance with this IA Board direction.

September 29, 2022: At the September 29, 2022, meeting, the staff proposed FY 2023-2027 capital budget, identified the majority of funding for the NWCC Tharpe Street project later in the Blueprint program, beginning in FY 2034. Stated plainly, at that time the project as originally scoped was to be funded near the end of the program. The approved FY 2023 budget included a $1.5 million allocation to initiate the project. This allocation provided funding for the PD&E Study as well as the strategic acquisition of a property for a future stormwater management facility.

March 9, 2023: At the March 9, 2023, meeting, staff presented a status update on the NWCC project, which included an overview of the findings of the 2019 CRTPA Traffic and Operations Analysis for Tharpe Street. The CRTPA study identified safety and operational enhancements to improve Tharpe Street without the need to widen to four lanes. Based on those findings, the IA Board authorized Blueprint to advertise and award a contract for planning and design services for the enhanced two-lane Tharpe Street Project prioritizing sidewalks and operational improvements to improve safety, beautification and accessibility.

This re-scoping — delivering the corridor's pedestrian safety, drainage, and operational needs without the four-lane widening — reduced the project's estimated cost from $68.8 million to $49.5 million and is the action that moved the project's planned construction from FY 2037 — two years before the one-cent sales surtax that funds Blueprint expires in 2039 — to FY 2030 while maintaining the IA Board approved project prioritization. Using alternative funding sources and a phased construction approach, staff presented a long-range funding plan at the May 11, 2023, budget workshop showing the re-scoped project as fully funded within projected program revenues — in part through a planned State Infrastructure Bank (SIB) loan, discussed in the Project Funding section below — and advanced its construction date by seven years, from FY 2037 (as presented in the IA Board approved 2021 Long Range Implementation Plan) to FY 2030.

September 21, 2023: The FY 2024 budget, approved by the IA Board at the September 21, 2023, meeting, included a $2 million allocation to fund design services for the NWCC Tharpe Street project, following the completion of the PD&E study.

April 2024: The Tharpe Street PD&E began in April 2024 in accordance with previous IA Board direction. Importantly, this process followed the National Environmental Policy Act (NEPA) requirements to ensure eligibility for federal funds. The PD&E was completed in May 2026.

September 11, 2025: An additional $6 million was allocated to further fund design services and right-of-way for the NWCC Tharpe Street project at the September 11, 2025, meeting in the FY 2026 budget. To date, $9.5 million has been allocated to the project through the Blueprint capital budget to fund the first project phases. The funding allocated to the project to date supported the recently completed PD&E Study and will fund the design and permitting for the project. The current allocation of funding is anticipated to fund critical segments of sidewalk while Blueprint continues to pursue grants and outside funding for the remainder of the construction consistent with IA Board direction.

May 2026: The PD&E Study was completed in May 2026, producing the preferred alternative — an enhanced two-lane roadway with curb and gutter, sidewalks on both sides, and a piped drainage system — and the project's first study-based cost estimate,

$62.3 million. The Project Status and Schedule section below describes the study, the preferred alternative, and the remaining schedule in detail.

May 26, 2026: Blueprint applied for the 2026 United States Department of Transportation (USDOT) Safe Streets for All (SS4A) Grant Program. This program is awarded on a competitive basis to support planning, infrastructure, and behavioral and operational initiatives to prevent fatalities and serious injuries on roads and streets involving all roadway users, including pedestrians, bicyclists, public transportation, motorists, and commercial vehicle operators. The application requested $20,135,384 to support design and construction for the first phase of the Tharpe Street improvements from Ocala Road to Mission Road. The selection for this award is expected to be announced in December 2026.

Consistent with IA Board direction, Blueprint has pursued leveraging opportunities within USDOT grant programs in recent cycles. These programs include Better Utilizing Investments to Leverage Development (BUILD), Reconnecting Communities (RCP), Rebuilding American Infrastructure with Sustainability and Equity (RAISE) and SS4A. Blueprint will continue identifying and applying for leveraging opportunities for this project through FDOT, USDOT and other partners. This project has ranked highly based on the merit criteria and eligibility for these grant applications; however, these programs are highly competitive, and selection is ultimately made at the discretion of the USDOT Secretary.

This practice of supplementing sales surtax dollars with outside funding is not unique to Tharpe Street. Under the IA Board's Leveraging Policy (Blueprint Policy No. 104), it is how every Blueprint project is delivered, and it has produced results: since 2004, Blueprint has leveraged more than $425 million in outside funding across its projects, primarily along state-owned roadways. The Safe Streets and Roads for All (SS4A) program to which Blueprint has applied for Tharpe Street has already produced an award in this community for the Blueprint program. In December 2025, USDOT awarded Leon County a $16.8 million SS4A grant for the North Monroe Street Safety Implementation project, a $21 million safety project whose required local match is funded through Blueprint. Like Tharpe Street today, North Monroe was not fully funded until that grant was awarded. Another recent roadway project example includes a $4 million grant awarded through the FDOT Transportation Regional Incentive Program (TRIP), a state program that matches regional transportation investments, for the Northeast Gateway: Welaunee Boulevard project.

In sum, the IA Board placed the project fourth in the funding order among Blueprint's four large local roadway projects, allocated funding to the project as it has advanced through its phases, and, in 2023, re-scoped the project in a manner that reduced its estimated cost thereby moving its planned construction date forward by seven years. In alignment with the funding strategy for the project, Blueprint continues to apply for grants to fund this construction. The next section describes the project's current status and schedule.

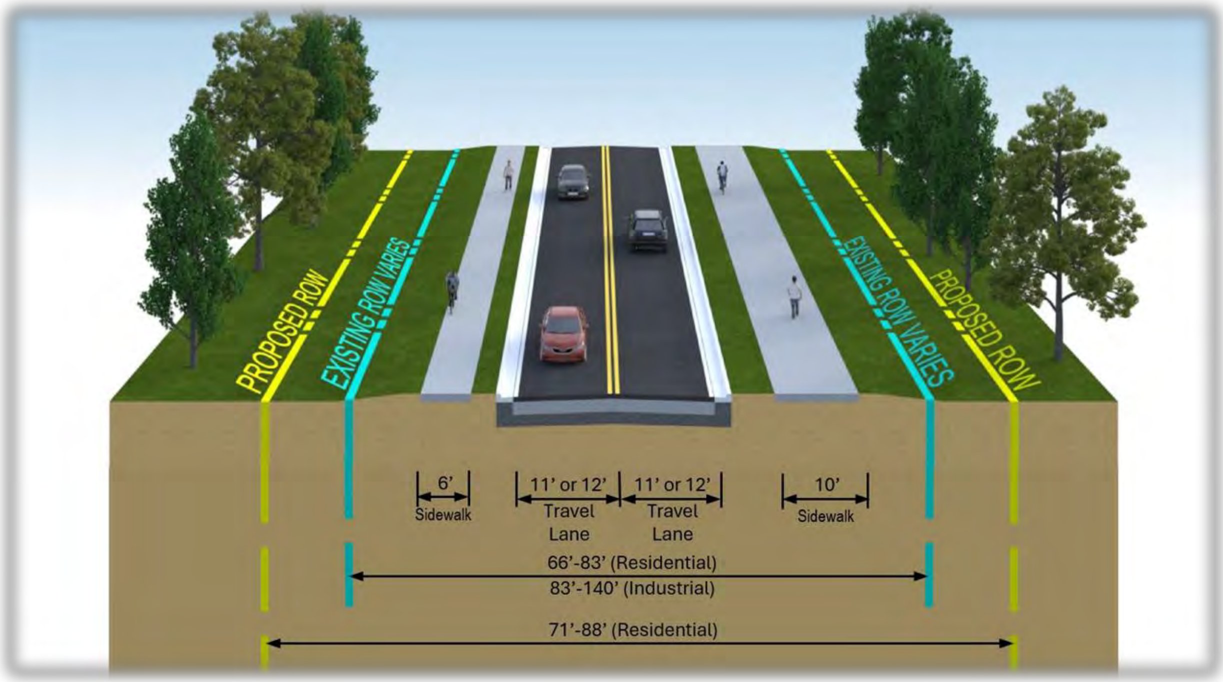
Project Status and Schedule

The project has completed the planning phase and is entering design. This section describes the completed PD&E Study, the preferred alternative and cost estimate it produced, the public input received, and the schedule for the design, permitting, right-of-way, and construction phases that remain.

PD&E Study: The Project Development and Environment (PD&E) Study began in April 2024 and was completed in May 2026. A PD&E Study is a formal planning study, conducted under the NEPA and other federal and state laws and regulation that identifies a project's purpose and need, evaluates the alternatives for meeting that need with public involvement, considers the social, natural, cultural, and physical effects of each alternative, and selects a preferred alternative to carry into design. Completing the study under NEPA preserves the project's eligibility for federal funding, consistent with the IA Board's 2021 direction.

The preferred alternative, shown in Figure 2, selected through the PD&E Study consists of a two-lane undivided roadway with curb and gutter. The preferred alternative addresses pedestrian safety, multimodal transportation needs, and stormwater management. The corridor will have a minimum six-foot sidewalk on the north side of the roadway and a ten-foot sidewalk on the south side of the roadway. A landscape buffer is provided between the curb and gutter and the sidewalk. During design a landscape plan with appropriate street trees and shrubs will be developed to enhance the corridor. A closed drainage system will convey the stormwater to improved stormwater management facilities. The PD&E Study estimates the cost of the project at $62.3 million. As with all projects, the cost estimate will continue to be refined as it goes through design, permitting, and right of way acquisition, adjusting for real estate values, material/labor market changes, and permitting requirements.

Figure 2: PD&E Study Preferred Alternative Typical Section



Public Involvement: Blueprint held a public meeting concerning the NWCC Tharpe Street PD&E Study on Thursday, February 12, 2026, at Abundant Life and Restoration Ministries (ALARM) International Church, 2532 W Tharpe Street. The public within the project area, property owners, federal, state, and local government agencies and officials were notified about the public workshop, and over 100 people attended the meeting. The preferred alternative was well received by the public and many comments and surveys were submitted for the project study. From the many comment forms and opinion survey forms that were collected from the meeting, the most frequently cited comments were related to the need for sidewalks/pedestrian safety, ditch improvements, bus stops and shelters, and general support for the proposed improvements. Attendees were asked to identify the roadway segment with the highest need for improvement. The highest ranked segment was from Trimble Road to Valley Green Drive. This input informs the phasing of design and construction, which Blueprint will carry out in segments to reduce traffic and utility disruptions and to deliver the most needed improvements first.

Design, Permitting, and Right-of-Way: Moving into design, the project will be divided into two segments. Segment 1 includes Tharpe Street from Mission Road to Ocala Road. Segment 2 includes Tharpe Street from CCNW to Mission Road. Dividing into two segments provides flexibility to keep the project advancing into construction while waiting for funding. Within the project, Segment 1 is the higher priority. Blueprint has advertised for design services for both Segments, and the selected consultant is planned to begin work later this year.

Design and permitting, the phase in which the preferred alternative is converted into detailed construction plans and the required federal, state, and local environmental and stormwater permits are obtained, is expected to take 24 months, with completion anticipated in FY 2029. When the design reaches 60 percent completion, the point at which the plans are detailed enough to identify exactly which properties are affected, Blueprint will finalize the project's right-of-way needs and begin acquiring the additional land, permanent easements (the right to use part of a private property for a public purpose, such as drainage, without purchasing it), and temporary easements (the same right during construction only) that the project requires. Blueprint anticipates beginning right-of-way acquisition in 2028. Right-of-way acquisition, together with the relocation of utility lines that conflict with the new roadway and drainage and coordination with the Florida Gulf & Atlantic Railroad (for the railroad crossing near Mission Rd), is expected to take 18 months and will proceed in parallel with final design rather than after it.

Construction: With design, permitting, and right-of-way complete, the project will be ready for construction in 2030.

Table 1 summarizes each phase, its schedule, and its funding status, which the next section explains.

Table 1: NWCC: Tharpe Street Project Phases, Schedule, and Funding Status

Phase	What the Phase Involves	Schedule	Funding Status
PD&E Study	Purpose and need, evaluation of alternatives, environmental review under NEPA, selection of the preferred alternative	April 2024 – May 2026 (complete)	Complete; funded by the FY 2023 allocation
Design, permitting, railroad coordination, utility coordination	Detailed construction plans, specifications, and cost estimates; federal, state, and local permits, coordination with utilities and railroads.	Begins late 2026 (FY 2027); 24 months; complete FY 2029	Segment 1 fully funded by current allocations. Positioning the project for leveraging opportunities.
Right-of-way acquisition, utility relocation.	Purchase of additional land and easements identified at 60 percent design; relocation of conflicting utilities	Begins 2028; 18 months, in parallel with final design	Segment 1 fully funded by current allocations. Positioning the project for leveraging opportunities.
Construction – Segment 1 (Ocala Road to Mission Road)	A. Construction of the most critical sidewalk section from Trimble Drive to Valley Green Drive.	Following right-of-way; ready by 2030	A. Critical sidewalk section expected to be fully funded by current allocations.
	B. Construction of all improvements on Segment 1 from Ocala Road to Mission Road		B. Pursuing funding through grant applications with matching funds provided by current allocations.
Design, Right of Way and Construction – remaining corridor (Segment 2, CCNW to Mission Road)	Roadway, sidewalk, and drainage improvements on the remaining segment.	2030 and later	Funded through grants and other leveraging and through sales surtax revenues in the later years of the program.

Project Funding

The questions raised at the June 11, 2026, meeting centered on whether the NWCC project is fully funded and whether funding has been moved from the project to other Blueprint projects. This section answers those questions by describing how Blueprint funds projects; what has been allocated to the project and what it covers; how project budgets and revenues change over the life of a long-term program, and the tools Blueprint uses on this and every project to keep projects moving as they change; how the balance of the project's cost will be funded; the grant application now pending; and how the project's funding relates to the three local roadway projects ahead of it in the funding order.

Consistent with standard practice for multi-year capital programs, Blueprint funds each project by phase as the project advances, in the priority order the IA Board established, rather than allocating a project's full estimated cost when the project begins. Every Blueprint project is funded this way, and it is the reason many projects can advance at the same time: the highest-priority projects receive construction funding while planning, design, or right-of-way work continues on others. A project is therefore fully funded for the phases it has reached, with later phases programmed in the five-year Capital Improvement Program (CIP), the schedule of planned project funding that accompanies each annual budget. Each year, as part of the annual budget process, a new fifth year is added to the CIP, and funding is allocated to the projects based on IA Board prioritization, revenue projection, and project readiness.

Measured against that practice, the NWCC project has funding allocated through design and permitting and for a portion of the project construction. As referenced earlier, there is an allocation of $9.5 million to the project. Approximately $1.5 million has been expended on the PD&E Study and the purchase of a property for a stormwater management facility, and approximately $8.0 million remains available to the project. Every dollar allocated to the project remains committed; no allocation to the project has been transferred to any other Blueprint project. The remaining $8.0 million allocation is to fund design and permitting for the full corridor, initial right-of-way acquisition, and construction of the most critical sidewalk section from Trimble Drive to Valley Green Drive, to directly address the pedestrian safety need, the highest priority expressed by the public during the PD&E Study.

As described in the grant section below, should the SS4A grant application be successful, or any future grant of a similar amount, Segment 1, Ocala Road to Mission Road, will be designed, permitted and all improvements in Segment 1 will begin construction in 2030 including roadway, stormwater, and pedestrian improvements. If grant awards are not received, using the $9.5 million prior year funding allocation, Blueprint will prioritize the construction of the most critical sidewalk section identified in the PD&E, from Trimble Road to Valley Green Drive, while continuing to apply for grants for construction of the remaining roadway, stormwater, and pedestrian improvements.

<u>How Project Budgets Change and How Blueprint Moves Projects Forward</u>: Project prioritization is the first step in implementation for Blueprint projects. Projects are initiated through direction from the IA Board, typically through the authorization to procure services for the initial project phases. Regardless of size, every Blueprint infrastructure project generally moves through the same sequence of phases: Planning (which may include Preliminary Engineering or a Project Development and Environment (PD&E) Study for large projects), Design, Permitting, Right-of-Way Acquisition, Construction, and Grand Opening. A primary function of this process, and one central to understanding how infrastructure organizations like Blueprint manage their budgets, is that the cost of a project is refined and updated at every phase as more project-specific information becomes available.

A project's cost estimate is not a single fixed number; it is updated with the project. The estimate prepared for the 2014 referendum was a planning-level figure based on generalized costs. The PD&E Study replaced it with an estimate based on a selected alternative, and design, right-of-way appraisals, and construction bids will each replace assumptions with actual figures. Estimates and revenues also move for reasons outside any one project: construction material and labor prices, real estate values, permitting requirements, and — as described below — state legislative actions that change how much sales surtax the program collects. Every project in a multi-decade capital program experiences these movements, in both directions.

Blueprint manages these movements with the same set of tools on every project. Each year, the annual budget and the five-year CIP re-balance the program against current estimates and revenues. Projects are divided into segments so that construction can begin on the highest-need portions while funding for the remainder is assembled. Outside funding is pursued under the IA Board's Leveraging Policy (Blueprint Policy No. 104), which directs Blueprint to seek grants and partner contributions to supplement local sales surtax dollars, and partner agencies, such as FDOT, deliver portions of projects under agreements. During design, Blueprint applies value engineering — a structured review that looks for ways to deliver the same function at a lower cost, such as adjusting drainage design, alignment, or materials — and, where conditions warrant, brings a re-scoping to the IA Board. The Tharpe Street project is itself the clearest example of these tools moving a project forward: the 2023 re-scoping, informed by the CRTPA traffic analysis, reduced the estimated cost, made the project fully fundable within the long-range plan of that time, and advanced its construction date by seven years.

<u>Changes Since 2023:</u> The long-range funding plan presented at the May 11, 2023, budget workshop showed the re-scoped project fully funded within projected revenues through the end of the program, with construction in FY 2030 to be partially funded through a planned State Infrastructure Bank (SIB) loan, a low-interest loan program through which the State lends transportation funds that are repaid from future revenues. Two things have changed since that plan was prepared. First, the 2026 PD&E Study replaced the $49.5 million planning-level estimate with a project estimate of $62.3 million. In addition, projected surtax collections for the remainder of the program have been reduced by state legislative actions, including expanded sales tax holidays and the repeal of the sales surtax on commercial real property leases effective this fiscal year. Second, funding from the SIB program available to local government entities like Blueprint has been substantially reduced. During the 2023 Legislative Session, the Governor proposed, and the Florida Legislature subsequently enacted, the Moving Florida Forward Infrastructure Initiative, which provides $7 billion to advance 20 critical transportation projects statewide, including Capital Circle Southwest in Tallahassee-Leon County. According to FDOT State Infrastructure Bank (SIB) Loan Program staff, the $7 billion initiative draws from several funding sources, including resources that otherwise support the SIB Loan Program. Consequently, FDOT does not anticipate SIB funding being available for new loans for the foreseeable future. The $20.0 million SIB loan previously contemplated for the project has therefore been removed from the long-range funding plan.

With that funding source no longer anticipated, the Line-Item Cost Estimate Summary presented at the June 11, 2026, budget workshop identifies $9.5 million currently allocated to the project and a remaining projected funding need of $52.8 million for FY 2027 through FY 2040. That remaining need is anticipated to be met through sales surtax revenues programmed in the later years of the Blueprint program and future grant awards. The PD&E Study's compliance with the National Environmental Policy Act (NEPA) maintains the project's eligibility to pursue federal funding opportunities.

The same Line-Item Cost Estimate Summary shows projected funding needs for all four Regional Mobility and Gateway projects, totaling $194.1 million, including a need of $19.6 million for Northeast Gateway: Welaunee Boulevard, the first project in the funding order. Beyond the fiscal year for which the budget is adopted, the Line-Item Cost Estimate Summary is a forecast: each year Blueprint updates the budget with cost estimates in effect at that time. The grant applications Blueprint has submitted to close the NWCC project's $52.8 million funding need, and the leveraging it continues to pursue, are described in the next section.

Grants and Leveraging: Under the Leveraging Policy, Blueprint pursues outside funding to supplement local sales surtax dollars, and to date the Agency has leveraged approximately $425 million in grants and partner contributions across its projects. For the NWCC Tharpe Street project, Blueprint has applied in recent grant cycles to programs of the USDOT, including BUILD, RCP, RAISE, and SS4A. These programs award funding on a competitive, nationwide basis, and selection rests with the USDOT Secretary. The project's completed PD&E Study and NEPA compliance, documented safety needs, and multimodal scope address the eligibility and merit criteria of these programs, and Blueprint will continue to apply for opportunities through FDOT, USDOT, and other partners.

As part of this, Blueprint applied to the 2026 SS4A program, which funds projects that prevent roadway fatalities and serious injuries. Specifically, Blueprint, in partnership with the City of Tallahassee, applied for a $23.5 million grant award. Blueprint's share of the grant is $20.1 million to support design and construction of Segment 1 of the Tharpe Street improvements, from Ocala Road to Mission Road. If the grant is awarded, the funding the IA Board has already allocated to the project serves as the required local match (the share of a project's cost the recipient must contribute as a condition of the grant). If the grant is not awarded, the design will proceed, and Blueprint will prioritize construction of the most critically needed sidewalk segments, based on the findings from the PD&E Study, and continue to apply for grants as they are announced. USDOT is expected to announce awards for SS4A in December 2026. Should additional funding be available from partnerships or sales surtax revenues, additional segments of sidewalk and roadway operational improvements can be implemented.

Funding in Relation to the Other Regional Mobility and Gateway Projects: The three local roadway projects the IA Board placed ahead of the NWCC project in 2018 and 2021 are in later and more costly phases: segments of Northeast Gateway: Welaunee Boulevard are under construction; Northeast Connector Corridor: Bannerman Road has reached 90 percent design, is acquiring right-of-way, and is procuring a contractor for its first construction phase; and Airport Gateway is delivering segments through design, right-of-way, and construction. Each project's allocation reflects the phase it has reached under the funding order the IA Board established. Tharpe Street is the earliest-phase project of the four, and its allocation funds design, permitting, and construction of the most critical sidewalk section, from Trimble Road to Valley Green Drive (within Segment 1, Ocala Road to Mission Road). Additional improvements in Segment 1 and Segment 2 would be constructed if a grant is awarded or if cost estimates are reduced as the project moves into construction, as described above under How Project Budgets Change and How Blueprint Moves Projects Forward.

Process for Reprioritizing Blueprint Projects

As requested by the IA Board at the June 11, 2026, meeting, the following provides information on the process to reprioritize Blueprint projects and then addresses what reprioritizing the NWCC Tharpe Street project would and would not accomplish for the project's schedule, and what it would mean for the other Blueprint roadway projects. In plain terms, reprioritizing means moving Tharpe Street ahead of one or more of the three projects the IA Board placed before it in the funding order. Because all four projects draw on the same sales surtax revenues, moving one project up the order moves money with it: future allocations now programmed for the higher-ranked projects would be redirected to Tharpe Street.

Reprioritizing a project is a substantial change. Under the Bylaws of the Blueprint Intergovernmental Agency (Section D (1)), substantial changes include reprioritizing projects by advancing or delaying them, deleting projects, adding projects not on the original approved lists, and changing a project's scope in a way that alters its original intent or location. Moving the NWCC Tharpe Street project ahead of any of the three projects ranked above it falls within the first of these categories.

Under the Bylaws and the Interlocal Agreement (Part V, Section 10), a substantial amendment proceeds in several steps:

1. First, the IA Board votes to initiate the substantial amendment process by majority vote. This will direct staff to prepare agenda items for the meetings described below and to draft required supporting documents, i.e. revised project descriptions, if applicable, or revised prioritization charts/tables, and relevant fiscal analyses.
2. At the next scheduled Citizens Advisory Committee (CAC) meeting a public hearing will be held regarding the proposed substantial amendment. See Attachment #4 for details on the CAC membership and role.
3. At the next scheduled Technical Coordinating Committee (TCC) meeting, the proposed substantial amendment is discussed, and a recommendation is provided to the Blueprint Director to relay to the IA Board. See Attachment #5 for details on the TCC membership and role.
4. The Intergovernmental Management Committee (IMC) will provide its recommendation through its management review of the draft materials and

agenda item that staff is required to prepare and present to the IA Board. See Attachment #6 for details on the IMC membership and role.

5. At the IA Board's next meeting, which will also serve as the second and final hearing on the proposed substantial amendment, the IA Board will vote (supermajority), after hearing from the public, as to the proposed substantial amendment.
6. The vote must be a supermajority of the members who are County Commissioners and a supermajority of the members who are City Commissioners, thus 4 City Commissioners and 5 County Commissioners must vote in the affirmative for the proposed substantial amendment to pass.
7. This process does not require separate meetings of the City or County Commission; under the Interlocal Agreement, changes to the Blueprint Projects and Programs are made by the IA Board itself.

The process begins and ends with IA Board direction. The IA Board can direct staff to bring back an agenda item to initiate this process and to schedule the required public hearings with the CAC and the IA Board. Option 2 provides that direction; if the IA Board votes to start the substantial amendment process at the next scheduled meeting, November 12, 2026, then, assuming the voting thresholds are met, the process could be complete by the following meeting, which is proposed for March 11, 2027. Reprioritization by the IA Board would change the priority order of the large transportation projects and future proposed budgets would reflect this change.

<u>What Reprioritization Would and Would Not Change</u>: Reprioritizing the project would not change when construction can begin. It would change where the funding for construction comes from and how much of the corridor that funding builds. The date construction can begin is set by the completion of phases that precede it. Design and permitting take 24 months; right-of-way acquisition, utility relocation, and railroad coordination take a further 18 months beginning at 60 percent design; and construction cannot begin on a segment until Blueprint controls all of the property needed to build it. Additional funding shortens none of these phases, and the corridor is projected to be ready for construction in 2030 with or without reprioritization.

The funding source is the part reprioritization would change. Under the 2021 Long-Term Implementation Plan, design for the Tharpe Street project is fully funded, construction of the sidewalk for the most critical section, as identified in the PD&E Study, is funded by 2030, and the remainder of construction is to be funded through outside sources such as federal grants. Construction of the complete corridor improvements therefore depends on additional funds such as grant awards, partnerships, and/or sales surtax revenues. Committing local funding in place of those awards would remove that dependence and would fund additional construction needs without waiting for grant awards.

The funding that would be redirected to Tharpe Street is currently programmed for the three higher-ranked projects under the IA Board's prior prioritization. Funding already spent or under contract on those projects, also known as encumbered, is committed and would not move; what reprioritization reassigns is the unencumbered prior year allocations and future funding programmed for the currently higher ranked projects. The current budget and five-year CIP implement the 2021 Long-Term Implementation Plan, and under that plan the sales surtax revenues are committed to segments of Northeast Gateway, Airport Gateway, and Bannerman Road — projects with segments complete, in right-of-way acquisition, in final design, and under construction, several of them delivered under agreements with partner agencies such as FDOT and Florida State University. For those projects, reprioritization would mean that upcoming segments would be deferred until later in the program, re-scoped to fit the reduced funding, or not built within the current program. A re-scoping can change what a project delivers — for example, reducing planned travel lanes from four to two, building a sidewalk on one side of the road rather than both, substituting standard sidewalks for wider shared-use paths, replacing planned roundabouts with conventional intersections and traffic signals, or reducing the project limits. Which segments and which features would be affected would depend on which projects the IA Board moves down the order and by how much; staff would present that analysis, project by project, as part of the substantial amendment process described above. Additionally, as noted above, if the proposed change to the re-scoped project alters its original intent or location, a substantial amendment may be triggered for that project.

CONCLUSION

This item addressed, in the order previewed in the Statement of Issue, the following:

First, the IA Board established the NWCC project's scope, funding order, and schedule through its actions from 2017 through 2025, including the March 9, 2023, direction that re-scoped the project to an enhanced two-lane corridor, reduced its estimated cost, made it fully fundable within the long-range plan of that time, and moved its construction date forward by seven years.

Second, the PD&E Study is complete, the preferred alternative carries a cost estimate of $62.3 million, and design begins later this year, followed by right-of-way acquisition in 2028 and construction within the first segment in 2030.

Third, the $9.5 million allocated to the project remains committed to it and funds the PD&E Study (completed), design and permitting, initial right-of-way, and anticipated construction of the most critical sidewalk sections; the $52.8 million balance is to be funded from grant awards and from sales surtax revenues in the later years of the program. Project budgets move over the life of the program, and Blueprint manages those movements on every project through the annual budget process, segmenting, leveraging, value engineering, and, where warranted, re-scoping — the tool that moved this project forward in 2023.

Fourth, reprioritization is a substantial change under the Bylaws that requires two public hearings, and supermajority votes of the County and City members; it would not change when construction can begin; however, it would change where construction funding comes from and how much of the corridor is built, by reassigning future funding programmed for upcoming segments of Northeast Gateway, Airport Gateway, and/or Bannerman Road — segments that would then be deferred, re-scoped, or not built within the current program, depending on the reprioritized order of projects.

The NWCC Tharpe Street project is proceeding on the schedule and funding plan the IA Board established. Design and permitting of the first segment is funded, and construction of the most critical sidewalk from Valley Green to Trimble is funded. Blueprint will begin design later this year and will continue to apply for grant funding for construction. The recommended option is to accept the status update (Option 1).

OPTIONS:

Option 1: Accept the status update on the Northwest Connector Corridor: Tharpe Street project.

Option 2: Direct staff to bring back an agenda item to initiate the substantial amendment process for reprioritization of the Northwest Connector Corridor: Tharpe Street project, including scheduling the required public hearings before the Citizens Advisory Committee and the IA Board and presenting the effects of the reprioritized funding order on the segments and scope of the Northeast Gateway: Welaunee Boulevard, Airport Gateway, and Northeast Connector Corridor: Bannerman Road projects.

Option 3: IA Board Direction.

RECOMMENDED ACTION:

Option 1: Accept the status update on the Northwest Connector Corridor: Tharpe Street project.

Attachments:

1. Northwest Connector Corridor: Tharpe Street Project Map
2. June 21, 2018, IA Board agenda item: https://go.boarddocs.com/fla/talgov/Board.nsf/goto?open&id=AZUU2M79F6B6
3. May 27, 2021, IA Board agenda item: https://go.boarddocs.com/fla/talgov/Board.nsf/goto?open&id=C36JX74D9A86
4. Citizens Advisory Committee: https://blueprintia.org/about-blueprint/committees/citizens-advisory-committee/
5. Technical Coordinating Committee: https://blueprintia.org/about-blueprint/committees/technical-coordinating-committee/
6. Intergovernmental Management Committee: https://blueprintia.org/about-blueprint/committees/intergovernmental-management-committee/

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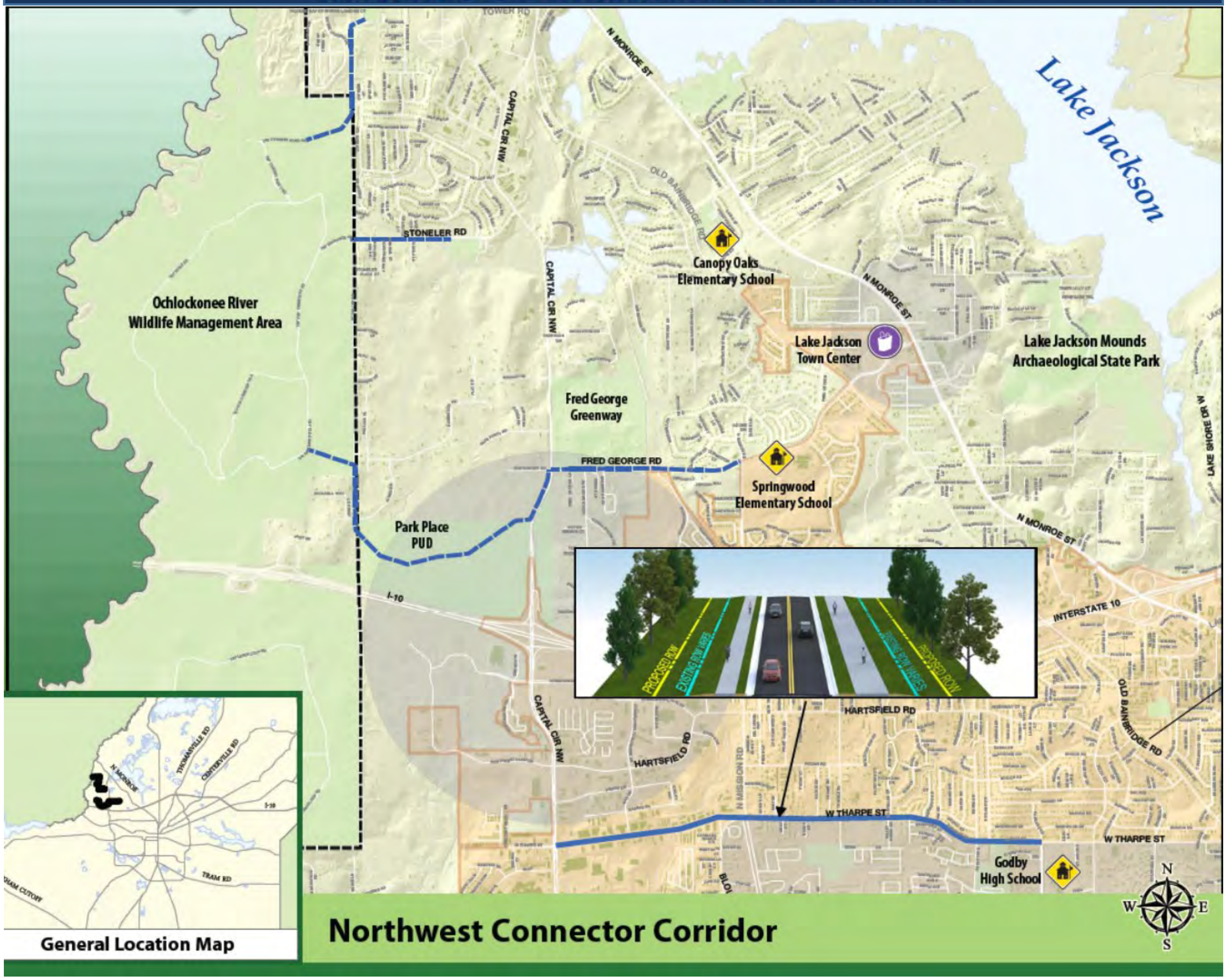
BLUEPRINT
INTERGOVERNMENTAL AGENCY



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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #7

September 24, 2026

Title:	Consideration of a Proposed Small Business Enterprise (SBE) Policy
Category:	General Business
Intergovernmental Management Committee	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, PLACE Keith Bowers, Director, Office of Economic Vitality Darryl Jones, Deputy Director, Office of Economic Vitality MWSBE, Division

STATEMENT OF ISSUE:

This item requests approval of a Small Business Enterprise (SBE) Policy to replace the current Minority, Women, and Small Business Enterprise (MWSBE) Policy to comply with Senate Bill 1134, which takes effect on January 1, 2027. The proposed SBE Program seeks to transition the current MWSBE program to a race- and gender-neutral framework while preserving the Office of Economic Vitality's (OEV) commitment to expanding opportunities for local small businesses through objective, legally compliant supplier development strategies.

FISCAL IMPACT

This item has no fiscal impact.

RECOMMENDED ACTIONS:

Option 1: Adopt the proposed Consolidated SBE Policy establishing a legally compliant, race- and gender-neutral Small Business Enterprise (SBE) Program; direct OEV to coordinate with City and County staff to advance corresponding agenda items for adoption by the City Commission and Leon County Board of County Commissioners.

Option 2: Suspend the operation and enforcement of the MWSBE Policy effective upon the adoption by the City and County of the Consolidated SBE Policy, or on December 31, 2026, whichever occurs first and authorize the

Blueprint Attorney to delete references to the MWSBE Policy that may exist in current Blueprint policies by December 31, 2026.

Option 3: Authorize the OEV Director to make all administrative and operational changes necessary to implement and administer the race- and gender-neutral Small Business Enterprise (SBE) Program, consistent with IA Board action.

EXECUTIVE SUMMARY:

As presented in this item, the proposed Small Business Enterprise (SBE) Policy (Attachment #1) transitions OEV's supplier development program to a race- and gender-neutral framework compliant with SB 1134 while maintaining a strategic focus on expanding opportunities for qualified small businesses. The proposed policy recommends aspirational SBE participation goals of 15 percent on applicable projects, expands recruitment of qualified firms, and strengthens access to capacity-building resources.

Consistent with current policy, SBE eligibility will remain based on business size rather than race or gender. Eligible firms must be locally owned, have fewer than 200 full-time employees, and have a firm net worth not exceeding $5 million. Maintaining these standards provides continuity for currently certified firms that remain eligible while allowing OEV to recruit additional qualified businesses to broaden the supplier pool serving the City of Tallahassee, Leon County Government, and Blueprint.

The recommended policy is informed by OEV's analysis of historical procurement and program data captured through its contract compliance and monitoring system, including project values, SBE utilization, attainment of participation goals, and certified-firm capacity based on annual revenue and employment. In coordination with City Procurement, Leon County Purchasing, and Blueprint, OEV will review applicable procurements to identify SBE prime and subcontracting opportunities and apply project-specific goals based on the scope of work and availability and capacity of qualified certified firms.

OEV will also continuously recruit qualified businesses for certification and connect certified firms with technical assistance and capacity-building resources through local business development and resource partners. These efforts are intended to strengthen the competitiveness and capacity of the certified supplier base while increasing the number and variety of firms available to meet public procurement needs.

Program performance will be monitored through OEV's compliance software annually. The annual SBE Program Report will evaluate project size, SBE prime awards, subcontracting utilization, and certified-firm capacity based on annual revenue and employment. This analysis will provide a consistent, data-driven basis for assessing program performance and presenting future recommendations for Board consideration.

The 2022 Economic Development Strategic Plan, the five-year plan the IA Board adopted to guide OEV's economic development work, identifies "Drive Business Recruitment, Retention, and Expansion" as one of its core strategies. The proposed policy carries out that strategy through the Agency's own contracting: it certifies eligible small businesses, sets participation goals on applicable projects, and recruits firms into the certified pool, so that small businesses established in Tallahassee and Leon County compete for a larger share of the Agency's construction and professional services work.

LEGAL ANALYSIS:

On April 22, 2026, the Governor signed Senate Bill 1134, which restricts Florida cities and counties from funding, promoting, or taking official action related to diversity, equity, and inclusion (DEI). The new law becomes effective on January 1, 2027. The new law declares any local ordinance, resolution, rule, regulation, program, or policy void if it conflicts with the law, and establishes potential consequences for local officials who violate its provisions. In addition, the law creates a cause of action for a resident of a city or county to sue for an alleged violation of the law and seek injunctive relief, damages, and costs.

The new law defines "Diversity, equity, and inclusion" to mean, in part, any effort to promote or adopt training, programming, or activities designed or implemented with reference to race, color, sex, ethnicity, gender identity, or sexual orientation. Further, the new law prohibits cities and counties from funding, promoting, directly or indirectly, or taking official action relating to diversity, equity, and inclusion as defined in the statute, and declares existing DEI-related ordinances, resolutions, rules, regulations, programs, or policies void as of the effective date. This new law will directly impact and prohibit the continuation of the Consolidated MWSBE Policy (Attachment #2) as it now exists.

Across Florida, local governments are evaluating and restructuring supplier diversity programs in response to SB 1134. Leon County and the City of Tallahassee are among the jurisdictions taking action to bring existing programs into compliance, including steps to repeal or modify code provisions tied to race- or gender-based classifications, while transitioning toward race- and gender-neutral Small Business Enterprise (SBE) programs as the framework for continuing to support small businesses in a manner consistent with current law.

SUPPLEMENTAL INFORMATION

Based on three fiscal years of data and a review of comparable small-business programs in other jurisdictions, OEV recommends implementation of the proposed SBE Policy designed to increase SBE participation, support business growth and job creation, and maintain meaningful competition and competitive pricing. The data analyzed included the capacity of OEV certified SBE firms based on annual revenues and number of employees; the number of certified SBE firms in a variety of industries—including construction, professional services and architecture and engineering; the values of projects awarded and the attainment of current aspirational goals. During the first year, OEV would establish project-specific aspirational SBE goals based on applicable scopes of work, subcontracting opportunities, certified-firm availability, and demonstrated capacity, while undertaking an expanded recruitment and supplier-development initiative to strengthen the current pool of 158 certified firms. After one year, OEV would provide the IA Board with an annual report of the SBE program and its activity.

COMPARISON OF SBE PROGRAMS IN OTHER JURISDICTIONS

The Tallahassee–Leon County Office of Economic Vitality (OEV) conducted a targeted comparative analysis of race-neutral Small Business Enterprise (SBE) programs in Miami-Dade County, the City of Jacksonville, Hillsborough County, Orange County, and Alachua County, Florida, as well as Columbus, Ohio, and Omaha, Nebraska. The analysis examines approaches used by Florida peer jurisdictions and selected national models to identify potential best practices that informed enhancements to OEV's supplier management program.

As the Tallahassee–Leon County public economic development organization, OEV supports the procurement functions of the City of Tallahassee, Leon County Government, and Blueprint Intergovernmental Agency, while advancing job creation, business expansion, supplier capacity building, and economic vitality. Given this unique role, the comparison focuses on two program approaches directly relevant to OEV's supplier management and economic development responsibilities: goal-setting methodologies and recruiting qualified SBE firms for certification.

The review found that SBE participation goals are established through governing-body policies and administrative frameworks informed by local market conditions, procurement and utilization data, supplier availability and capacity, and economic development objectives.

These approaches are evaluated as potential best practices rather than prescriptive solutions. The comparative analysis provided OEV with a framework to determine which practices may be appropriate for the Tallahassee–Leon County market based on local procurement data, supplier availability and capacity, operational requirements, and economic development objectives. This process supports the development of data-informed, narrowly tailored recommendations designed to strengthen small-business participation while advancing OEV's supplier management and economic development responsibilities in support of the City of Tallahassee, Leon County Government, and Blueprint Intergovernmental Agency. A summary of various SBE programs administered by the other jurisdictions is included as Attachment #3.

Tallahassee-Leon County SBE DATA (Fiscal Years 2023-2026)

The practices identified in the peer jurisdictions are appropriate for Tallahassee-Leon County only to the extent local contracting activity supports them. Staff therefore has compiled data for all projects completed by the City of Tallahassee, Leon County Government and Blueprint. As shown in Table 1 below, median project values and committed SBE goals in the Tallahassee-Leon County market vary significantly by procurement category, with construction representing largest contract opportunities and goal levels differing based on project structure, including self-performance. These distinctions provide a local, data-driven basis for evaluating whether SBE strategies identified in the comparative review of other jurisdictions, including differentiated aspirational goals, are appropriate for the Tallahassee-Leon County marketplace. Any recommended strategy can therefore be tailored to the characteristics of each procurement category rather than uniformly applied across all procurements. Please note that the number of projects listed below reflects only those projects for which aspirational goals were assigned.

Table #1: Median Value of Construction and Professional Services Contracts Awarded and the Median Value of Aspirational Goals Committed (FY2023-2026)

Category	# of Projects	Median Value Awarded	Median Assigned Project Goals
Architecture & Engineering	13	$203,881	9.00%
Construction (W/O Self-Performance)	43	$1,546,126	9.54%
Construction (With Self-Performance)	52	$1,535,414	9.71%
Professional Services	6	$249,500	15.00%

Table #2 below provides data from the last three fiscal years and identifies the volume of locally awarded projects across three recommended contract-value ranges:

- Small purchases, and contracts (less than $100,000);
- Mid-sized operational and project-level contracts (between $100,001 and $500,000); and
- Large contracts, including capital improvement projects (between $500,001 and $5,000,000).

This historical distribution provides an empirical basis for developing a narrowly tailored SBE procurement strategy by aligning potential program measures with contracting activity already demonstrated in the local market, rather than relying on arbitrary thresholds or models adopted by other jurisdictions. The number of projects listed below reflects all projects awarded.

Table #2: Total number of projects divided into tiers based upon project values and the number of projects awarded (FY2023-2026)

# of Projects	Value of Awarded Projects	Project Description	Project Size
93	$2,000 – $100,000	High volume of entries Typical small/vendor purchases	Small
106	$100,001 – $500,000	Large operational / project-level contracts	Mid-sized
91	$500,001 – $5,000,000	High volume of Capital Improvement Projects	Large

Certification data provided in Table #3 below demonstrates the depth and distribution of the local SBE market by procurement category. The number of certified firms within each category can inform aspirational goal setting by identifying where sufficient supplier availability exists to support meaningful participation and where more limited availability may warrant different expectations or targeted recruitment of additional firms.

Table #3: Current Number of Certified Firms by Procurement Category

Procurement Category	# of Firms
Architecture and Engineering	16
Construction Services	53
Materials and Supplies	5
Other Services	47
Professional Services	37
Total	158

Certification data in Table #4 below identifies differences in the financial and organizational capacity of certified firms based on reported revenue and employment. The analysis includes OEV-certified firms and firms recognized through OEV's reciprocal SBE agreement with the Leon County School Board (LCSB).

Table #4: Total Number of Certified SBE Firms by Annual Income

Income Range	Business Count	# of Employees	Average Employees
$0 - $179,000	53	1-17	2.64
$179,001- $895,000	53	1-32	6.19
$895,001 - $22,000,000	52	1-73	14.37

STAKEHOLDER ENGAGEMENT

To inform the development and optimization of the new race- and gender-neutral Small Business Enterprise (SBE) program, OEV convened the following focus groups who represent key perspectives across the local supplier development and procurement ecosystem:

- Project managers from the City of Tallahassee, Leon County Government, and Blueprint
- OEV-certified firms
- Prime contractors and consultants
- The Capital City Chamber of Commerce
- The Greater Tallahassee Chamber of Commerce
- The MWSBE Citizen Advisory Committee

Each group provided a distinct perspective on the factors that influence successful SBE participation, including procurement practices, supplier availability, business capacity, contracting relationships, project delivery, and business development needs. Collectively, these perspectives provide OEV with stakeholder input to inform a program structure that reflects both the experiences of businesses seeking public contracting opportunities and the operational requirements of the agencies and firms responsible for procuring and delivering public projects. The results of these focus group discussions, including areas of alignment with OEV's recommended actions and additional considerations identified by each stakeholder group, are summarized below.

Project Managers from City of Tallahassee, Leon County Government, Blueprint

OEV convened project managers from the City of Tallahassee, Leon County, and Blueprint to gather input for designing the new race- and gender-neutral Small Business Enterprise (SBE) program. Participants supported retaining subcontracting goals, noting that without goals, small business participation could significantly decline. Key themes included improving procurement visibility, establishing appropriate project reservation thresholds, expanding the certified firm pool, and streamlining subcontractor substitution processes to improve project delivery.

Input from project managers aligns with OEV's recommended actions to establish overall and project-specific participation goals based on project scope and qualified firm availability. Stakeholders also recommended proactive recruitment of qualified firms, consistent with OEV's continuous certification and supplier expansion strategy. Additionally, stakeholder concerns regarding bonding, insurance, and prior contract experience align with OEV's recommendation to consider demonstrated business capacity and contract sze when structuring SBE opportunities.

OEV Certified SBE Firms

The certified firms focus group supports several core elements of OEV's recommended SBE framework. Participants supported retaining SBE subcontracting goals, with goals established according to available certified firms and applicable scopes of work rather than demographic classifications. This corresponds with OEV's recommendation for overall and project-specific participation goals based on supplier availability, scope, and capacity.

Certified firms also identified bonding capacity, access to financing, bid estimating, prime contractor readiness, contract administration, and networking as priority business development needs. These priorities correspond with OEV's recommendation to direct technical assistance and capacity-building resources toward identified supplier and market needs.

Although the focus group of OEV-certified firms supports key components of OEV's recommended actions, participants raised concerns regarding the transition to a broader race and gender-neutral SBE pool, including increased competition for limited public contracting opportunities and the loss of targeted minority and women-owned business opportunities.

Participants also emphasized the importance of good-faith requirements, which require firms to meet SBE goals or document qualifying outreach efforts. Additionally, participants identified financing and prime-contractor readiness as important tools for competing under the new structure.

Prime Contractors and Consultants

The contractor and consultant focus group findings correspond with key elements of OEV's SBE recommendations. Participants supported project-specific goals informed by available SBE capacity and scope of work, rather than uniform percentages across procurements. They also identified workforce capacity, bonding, insurance, quality, and performance as factors affecting a firm's ability to successfully perform contracting opportunities.

Participants identified measurable differences in supplier availability by trade, with stronger SBE representation in landscaping, hauling, surveying, smaller concrete projects, and striping, and more limited capacity in specialized and capital-intensive trades. Participants also indicated that project size and scope complexity should inform opportunities for SBE participation. These findings correspond with OEV's proposed use of supplier availability, contract size, scope, and capacity data to establish project-specific goals. Focus group participants identified several factors that affect how SBEs are selected, developed, and evaluated within the program. Past performance, established relationships, bonding, insurance, and schedule risk were cited as considerations in subcontractor selection. Participants also identified project delivery satisfaction, financial growth, backlog growth, and repeat business as measures that could be used to assess whether participating OEV-certified firms are increasing their capacity and securing continued work. Additional program considerations included graduation criteria for firms that grow beyond program thresholds, structured workforce pipelines, and mentor-protégé models, all of which should be considered to support SBE participation and business development.

The Capital City Chamber of Commerce

The Capital City Chamber of Commerce focus group findings align with OEV's recommended policy direction in several substantive areas. Capital City Chamber of Commerce focus group members supported maintaining subcontracting participation goals and continuing OEV's project-level review of scopes and certified-firm availability, consistent with OEV's recommendation to establish overall and project-specific goals based on actual procurement opportunities and supplier capacity.

Capital City Chamber of Commerce focus group members supported structuring reserved opportunities so that firms compete against businesses of comparable size and capacity and agreed that tiers should be used only where sufficient qualified firms exist to maintain competitive pricing.

Further, the focus group's emphasis on supplier readiness corresponds with OEV's data-informed supplier development strategy. Focus group members recommended using OEV's certification and business data to identify industry concentrations and gaps and identified fiscal management, operational readiness, access to capital, procurement assistance, and networking as business capacity needs.
Beyond these areas of alignment, Capital City Chamber of Commerce focus group members supported a bid preference provision for qualifying SBEs within defined price parameters and discussed upward mobility within a tiered system, allowing capable lower-tier firms to pursue larger opportunities while restricting larger firms from competing downward. Focus group members also emphasized connecting certification to procurement opportunities, expanding outreach to additional industries and micro-businesses, and coordinating with resource partners to deliver ongoing business assistance.

The Greater Tallahassee Chamber of Commerce

The Greater Tallahassee Chamber of Commerce focus group identified several areas that align with OEV's recommended SBE framework. Focus group members emphasized that program performance should be measured by the actual utilization of qualified SBEs and their demonstrated ability to perform the work, rather than certification levels alone. This aligns with OEV's proposed use of procurement and compliance data to assess supplier availability, capacity, participation, and performance.

Focus group members also emphasized the need for supplier recruitment, outreach, and business development to expand the pool of firms positioned to compete for public contracts. The discussion highlighted the importance of increasing awareness of certification opportunities, strengthening relationships between SBEs and prime contractors, and helping businesses navigate available technical assistance and business-support resources. Members further identified business growth and graduation beyond SBE eligibility thresholds as a measure of successful capacity development.

The Focus group also identified several implementation considerations for further discussion. Members called for greater visibility into upcoming projects and continuing services opportunities so firms can plan staffing, partnerships, and subcontracting relationships in advance. The group also discussed strengthening local preference standards to better distinguish locally headquartered and operated firms from national firms with limited local presence. Additional considerations included reviewing qualification and security requirements that may unnecessarily restrict capable local firms, expanding opportunities for prime-SBE relationship building, and simplifying access to the community's business-assistance resources.

The MWSBE Citizen Advisory Committee

The MWSBE Citizen Advisory Committee, whose membership includes appointees of the City Commission and Leon County Board of County Commissioners and representatives from each of the three local Chambers of Commerce, provides recommendations that inform OEV's community and stakeholder engagement. Given its familiarity with OEV's supplier diversity and development efforts, the Committee provided informed input on the transition to a race- and gender-neutral SBE Program.

The Committee supported maintaining project-specific subcontracting goals where the scope of work and availability of qualified firms support SBE participation. Members also strongly supported continued capacity-building opportunities to help certified firms strengthen their competitiveness and position themselves for larger contracting opportunities. Looking ahead, the Committee recommended that SBE-reserved opportunities, where supported by program data, be structured by firm size and by demonstrated capacity to promote meaningful competition among similarly situated businesses. While recognizing the statutory requirements driving the transition to a race- and gender-neutral SBE Program, members expressed particular concern about the potential impact on currently certified firms and emphasized that both immediate and longer-term program strategies should support their successful transition and continued competitiveness. Collectively, these recommendations support a data-informed transition that preserves meaningful contracting opportunities, strengthens the capacity of existing certified firms and positions them to compete successfully under the new SBE Program.

The Committee's own standing changes under the transition as well. Senate Bill 1134 takes effect January 1, 2027, and on that date the MWSBE Program ends. The proposed SBE Policy provides the race- and gender-neutral program that, with IA Board approval, replaces it, and establishes the Tallahassee-Leon County Citizens Advisory Committee as the citizens advisory committee for the SBE Program. The transition reaches the EVLC through one seat, the one held by the Chairperson of the MWSBE CAC under the EVLC Bylaws. The proposed policy does not amend those Bylaws. Staff will present the conforming amendment substituting the Chairperson of the Tallahassee-Leon County Citizens Advisory Committee to the IA Board at its November 12, 2026, meeting, effective January 1, 2027. The Chairperson of the MWSBE CAC holds the seat until that date.

PROGRAM POLICY RECOMMENDATIONS:

OEV recommends that the IA Board adopt the proposed SBE Policy. The program's first year of operation will establish participation goals and expands the certified supplier base while OEV's compliance system records how the program performs. Staff will analyze that year of local data and produce recommendations to the IA Board on the goals, the certified pool, and the contracting tools the policy makes available. This approach is described below:

Year One: Establish Goals and Expand the Certified Supplier Base

OEV recommends the following:

- An overall SBE aspirational goal of 15% for all projects based on the project's feasibility and the availability of firms;
- Aspirational goals are applied to Architecture and Engineering, Construction, Professional and Other Services projects as determined during the pre-solicitation process based upon the feasibility and availability of OEV-certified firms;
- Existing OEV-certified SBE firms remain certified through FY 2027;
- All new qualifying local SBE firms will be required to certify through the Florida Office of Supplier Development and will subsequently qualify for consideration by OEV staff through the reciprocal agreement between both offices provided the OSD certification does not consist of an MBE or WBE component in contravention of SB 1134.
- Throughout year one, OEV will maintain an ongoing SBE recruitment and certification strategy focused on increasing both the number of certified firms and their representation across the industries and procurement categories required by the City of Tallahassee, Leon County Government, and Blueprint Intergovernmental Agency.
- OEV's compliance software will capture utilization, contract values, industries, scopes of work, participation, and supplier performance, establishing a full year of local data for subsequent program analysis to inform the Blueprint IA Board of Directors for further consideration. Furthermore, OEV will remain intentional in fortifying pathways for OEV-certified firms to harness the services and resources of its business development partners to increase the capacity of already existing SBE firms to build capacity to ensure competitive pricing in an expanded market.

Year Two: Analyze the First Year of Data and Report to the IA Board

OEV will analyze the data captured during the first year — project size, SBE prime awards, subcontracting utilization, and certified-firm capacity measured by annual revenue and number of employees — to establish the availability, capacity, competition, and utilization the program produced: how many eligible firms were available in each procurement category, which categories drew competitive responses, and whether committed goals were met on awarded contracts. This analysis will produce the first local record of program performance under a certified pool that is no longer limited by race and gender criteria, and it is the basis on which the 15 percent goal, the categories it applies to, and the size of the certified pool will be evaluated after a full year of operation.

OEV will present that analysis to the IA Board in the annual SBE Program Report, together with staff's recommendations on the aspirational goal, on recruitment and certification, and on the contracting tools established by the policy, to refine and improve each of them based on the year's collected local data.

OPTIONS:

Option 1: Adopt the proposed Consolidated SBE Policy establishing a legally compliant, race- and gender-neutral Small Business Enterprise (SBE) Program; direct OEV to coordinate with City and County staff to advance corresponding agenda items for adoption by the City Commission and Leon County Board of County Commissioners.;

Option 2: Suspend the operation and enforcement of the MWSBE Policy effective upon the adoption by the City and County of the Consolidated SBE Policy, or on December 31, 2026, whichever occurs first and authorize the Blueprint Attorney to delete references to the MWSBE Policy that may exist in current Blueprint policies by December 31, 2026.

Option 3: Authorize the OEV Director to make all administrative and operational changes necessary to implement and administer the race- and gender-neutral Small Business Enterprise (SBE) Program, consistent with IA Board action.

Option 4: Do not adopt the proposed Consolidated SBE Policy establishing a race- and gender-neutral SBE Program.

Option 5: IA Board Direction

RECOMMENDED ACTIONS:

Option 1: Adopt the proposed Consolidated SBE Policy establishing a legally compliant, race- and gender-neutral Small Business Enterprise (SBE) Program; direct OEV to coordinate with City and County staff to advance corresponding agenda items for adoption by the City Commission and Leon County Board of County Commissioners.

Option 2: Suspend the operation and enforcement of the MWSBE Policy effective upon the adoption by the City and County of the Consolidated SBE Policy, or on December 31, 2026, whichever occurs first and authorize the Blueprint Attorney to delete references to the MWSBE Policy that may exist in current Blueprint policies by December 31, 2026.

Option 3: Authorize the OEV Director to make all administrative and operational changes necessary to implement and administer the race- and gender-neutral Small Business Enterprise (SBE) Program, consistent with IA Board action.

Attachments:

1. Proposed SBE Policy
2. Existing Consolidated MWSBE Policy
3. Review of SBE programs administered by other jurisdictions

BLUEPRINT
INTERGOVERNMENTAL AGENCY

DRAFT

SMALL BUSINESS ENTERPRISE POLICY

Effective date: _____, 2026

Leon County Government

City of Tallahassee

Blueprint Intergovernmental Agency

OFFICE OF ECONOMIC VITALITY
SMALL BUSINESS ENTERPRISE POLICY

TABLE OF CONTENTS

I. AUTHORITY

This Small Business Enterprise Policy ("Policy") supersedes the previously adopted MWSBE Consolidated Policy of the City of Tallahassee, Leon County, and Blueprint Intergovernmental Agency ("Blueprint"). The MWSBE Consolidated Policy shall no longer be effective. This Policy will be administered by the Office of Economic Vitality ("OEV"). Following approval of all three entities, this Policy will become effective on ___________2026.

II. SCOPE AND APPLICABILITY

This Policy is applicable to solicitations advertised by any and all City, County, and Blueprint officials and departments[1], except as may be limited by requirements of state and Federal law. All three entities reserve those rights set forth in their respective purchasing and procurement policies to the extent they are not in conflict with this Policy.

III. POLICY STATEMENT

Pursuant to City of Tallahassee Administrative Policies and Procedures Manual Section No. 1204 and Leon County Government Policy No. 18-1, the City, County, and Blueprint will not tolerate any form of discrimination in any of their programs, services, or activities. This Policy is meant to be race and gender neutral.

The City, County, and Blueprint intend to afford maximum utilization of SBE firms in all aspects of procurement activity and to award contracts with SBE participation consistent with the goals contained herein. A race- and gender-neutral program promotes the utilization of all SBEs in City, County, and Blueprint contracts.

This Small Business Enterprise Program benefits the City, County, and Blueprint by: (a) promoting competition in City, County, and Blueprint contracting; and (b) promoting economic growth and development in the Market Area.

The City, County, and Blueprint intend to institute and maintain an SBE program that provides for:

A. Utilization of certified SBE firms in all aspects of City, County, and Blueprint procurement activity.
B. Training, education and technical assistance to enhance opportunities for SBE firms participating in the City, County, and Blueprint purchasing and contracting activities.
C. Public information on the opportunities available for doing business with the City, County, and Blueprint.

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[1] Although the City of Tallahassee Procurement Services Division administers solicitations for the Consolidated Dispatch Agency (CDA) and Capital Region Transportation Planning Agency (CRTPA), this policy does not apply to the solicitations of the CDA and does not apply to the solicitations of the CRTPA.

IV. OBJECTIVES

A. To provide small businesses in the Market Area equal access and opportunities to compete and be awarded contracts and purchases.

B. To effectively communicate procurement and contracting opportunities, business and professional development resources for small businesses.

V. DEFINITIONS

The terms and words used in this policy are defined below.

1. “Affiliate” or “Affiliation” – When the owner of a firm either directly or indirectly controls or has the power to control another firm; a third party or parties controls or has the power to control both; or other relationships between or among parties exist such that affiliation may be found between the two firms. A firm is an affiliate of another when the owner of the firm has possession, direct or indirect of either: (i) the ownership of or ability to direct the voting of, as the case may be, more than fifty percent (50%) of the equity interest, value, or voting power of such firm, or (ii) the power to direct or cause the direction of the management and policies of such firm whether through the ownership of voting securities by contract or otherwise. In determining whether a firm is an affiliate with another firm or with an owner of another firm, consideration will be given to all appropriate factors including but not limited to common ownership, common management, contractual relationship, and shared facilities.
2. “Applicant” – a person who has submitted an application for certification as an SBE to the Office of Economic Vitality.
3. “Apprentice” – Any person who is enrolled in and participating in an apprenticeship program registered with the Florida Department of Education or the United States Department of Labor. If a registered apprenticeship program does not exist for the type of work on the construction project, then apprentice means any person participating in a company-sponsored training program for that type of work.
4. “Apprenticeship or externship relationship” – The relationship between a prime or subconsultant or subcontractor and apprentices or externs participating in a qualifying apprenticeship or externship program.
5. “Award” – The final selection of a respondent for offer of a specified prime contract or subcontract dollar amount. Awards are made by the City, County, and Blueprint to prime contractors or consultants or by prime contractors or consultants to subcontractors or subconsultants, usually pursuant to solicitations.
6. “Broker” **–** A person or firm engaged as a subcontractor or subconsultant whose sole involvement in a contract is for the purpose of collecting a broker's commission or fee, and with the intent of not performing any of the direct labor activities or services by his or her employees, and who subcontracts his or her portion of the work to another firm or firms.
7. ”Business days” – Monday through Friday, 8:00am to 5:00pm EST (not including City, County, or Blueprint observed holidays).
8. Business Categories for which the City, County, and Blueprint have established SBE Aspirational Goals include the following and have the following meaning:
   a) “Architecture & Engineering” – Architectural or engineering services provided by an appropriately licensed professional architect or engineer or by a professional architectural or engineering firm related to architectural or engineering services.
      i. “Architecture” - When provided by an appropriately licensed architect or architectural firm that employs appropriately licensed architects, "architecture" will mean the

rendering or offering to render services in connection with the design and construction of a structure or group of structures which have as their principal purpose human habitation or use, and the utilization of space within and surrounding such structures. These services include planning, providing preliminary study designs, drawings and specifications, job-site inspection, and administration of construction contracts.

ii. "Engineering" – Will include the term "professional engineering" and, when provided by an appropriately licensed professional engineer, licensed engineer, or an engineering firm that employs appropriately licensed professional or licensed engineers, "engineering" will mean any service or creative work, the adequate performance of which requires engineering education, training, and experience in the application of special knowledge of the mathematical, physical, and engineering sciences to such services or creative work as consultation, investigation, evaluation, planning, and design of engineering works and systems, planning the use of land and water, teaching of the principles and methods of engineering design, engineering surveys, and the inspection of construction for the purpose of determining in general if the work is proceeding in compliance with drawings and specifications, any of which embraces such services or work, either public or private, in connection with any utilities, structures, buildings, machines, equipment, processes, work systems, projects, and industrial or consumer products or equipment of a mechanical, electrical, hydraulic, pneumatic, or thermal nature, insofar as they involve safeguarding life, health, or property; and includes such other professional services as may be necessary to the planning, progress, and completion of any engineering services.

b) "Construction" – Services that include the building, attaining, repairing, improving, or demolishing any public structure or building, or other public improvement of any kind to any public real property. "Construction" does not include routine operation, routine repair, or routine maintenance of existing buildings or facilities.

c) "Professional Services" – Any service provided by a person or firm that is of a professional nature, with special licensing, educational degrees, and unusual or highly specialized expertise. Examples include, but are not limited to Financial Services, Legal Services, Medical Services, and Advertising/Marketing Services. "Professional Services" does not include "Architecture & Engineering," which is separately defined herein.

d) "Other Services" – Any service that is labor intensive and not considered professional or construction services as defined above. Examples include, but are not limited to maintenance services, janitorial services, lawn services, employment services, and printing services.

e) "Materials and Supplies/Purchases" – Equipment and consumable items purchased in bulk or deliverable products. Examples of such include, but are not limited to equipment and parts, chemicals, and paper products.

9. "Calendar Days" – All days of the week.
10. "Certification" – Verification that a business meets all eligibility criteria for participation in the SBE Program as an SBE.
11. "Certification Application" – Forms and documents an applicant must complete to be considered for Certification.
12. "Change Order" – Modification to the work scope, cost, or schedule phasing of a capital project contract, as authorized by the appropriate City, County or Blueprint authority. Also, for purposes of this policy, Change Order will include budget transfers and supplemental appropriations.
13. "Commercially Useful Function" (CUF) - A business performs a "Commercially Useful Function" when the business: (a) is responsible for the execution of a distinct element of work or services; (b) carries out its obligation by actually performing, managing, or supervising the work involved;

(c) performs work that is normal for its business, services and function; and (d) is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices. A prime contractor or consultant, subcontractor or subconsultant, or supplier will not be considered to perform a Commercially Useful Function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of SBE participation.

14. “Consultant” - Any person, firm, or legal entity that provides professional services governed by the Florida Consultants Competitive Negotiation Act and that has entered into a contract with the City, County, or Blueprint, or any of their contracting agencies.
15. “Contract” - Any agreement, regardless of what it may be called, between the City or County and a person, firm or legal entity to provide or procure labor, materials, supplies, or services to, for, or on the behalf of the City or County.
16. “Contractor” - Any person, firm, or legal entity, except those governed by the Consultants Competitive Negotiation Act, that has entered into a contract with the City, County, or Blueprint, or any of their contracting agencies.
17. “Control” – An applicant firm owner exercises control over the firm’s operations, work, management, and policy. Indication of control may include the following:
    a) Applicant firm owner(s) must demonstrate the ability to make unilateral and independent business decisions as needed to guide the future and destiny of the business, and their business must not be subject to any formal or informal restrictions that limit the customary discretion of such owner(s). There can be no restrictions through corporate provisions, by-law provisions, contracts or any other formal or informal devices that prevent the owner(s) from making any business decision of the firm without the cooperation or vote of another entity or person that is not an owner(s) or who would not be eligible for the SBE Program.
    b) Applicant firm owner(s) must control the day-to-day operations of the business in critical area(s). Administrative responsibilities alone are not sufficient to prove control. The owner(s) may delegate various areas of the management or daily operations of the business to other persons, who would not be eligible for the SBE Program or who are not owners, only if such delegation is typical in the industry for such business and such delegation is revocable.
    c) Applicant firm owner(s) must have an overall understanding of, and managerial and technical competence, experience, and expertise directly related to the firm’s operations and work.
18. “Director of PLACE” – The Director of the Department of Planning, Land Management, and Community Enhancement (PLACE).
19. “Good faith effort” – Effort made in good faith by a respondent to meet project specific SBE goals. Respondents may demonstrate good faith effort by meeting the project specific goals, or by demonstrating it has made reasonable effort to do so by submitting documentation of good faith effort.
20. “Independent” – A firm whose viability does not depend on its relationship with another firm is independent. Recognition of an applicant firm as a separate entity for tax or corporate purposes is not necessarily sufficient to demonstrate that a firm is independent. Indicators that a firm is independent include: (i) relationships with other businesses in such areas as personnel, facilities, equipment, financial and/or bonding support, and other resources; (ii) whether present or recent family, or employer/employee relationships compromise the applicant owner(s)’ independence; and (iii) whether the applicant owner(s)’ exclusive or primary dealings with a prime contractor compromises the applicant owner(s)’ independence.
21. “Joint Venture” – As used in this policy is a short-term business association—a separate legal entity like a corporation or LLC—consisting of certified SBE firm(s) and non-SBE firm(s) or certified

SBE firms formed to carry on a single business activity which is limited in scope and duration, which the parties jointly undertake for a transaction, for which they combine their property, capital, efforts, skills, and knowledge. Generally, each party will contribute assets and share risks. Joint ventures can involve any type of business transaction and the parties involved can be individuals, groups of individuals, companies, or corporations.

22. "Market Area" – The geographical area consisting of the following Florida counties: Leon, Gadsden, Jefferson, and Wakulla.
23. "Majority Ownership" or "Majority Owner" – Owning no less than 51% of a business enterprise.
24. "Manufacturer" – Will mean a person or firm engaged in the process of making, fabricating, constructing, forming or assembling a product(s) from raw, unfinished, semi-finished, or finished materials through a direct contract/agreement on behalf of the general contractor.
25. "Mentor-Protégé relationship" - A Mentor-Protégé relationship exists when an experienced company, firm, or individual (Mentor) provides assistance and training to an SBE firm (Protégé).
26. "SBE Program" – The programs and efforts under the provisions of this policy, either directly or through partners, to enhance participation in City, County, and Blueprint contracts by SBE firms.
27. "NAICS (North American Industry Classification System)" – The standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.
28. "Office of Economic Vitality (OEV) Director" - The Director of the Office of Economic Vitality.
29. "Owner" or "Ownership" – The person(s) who own(s) a business.
30. "Participation Plan" – The portion of a response to a solicitation provided by a respondent giving detailed information regarding respondent's plan to meet the project specific goals contained in the solicitation, intention to comply with this policy, and intention to utilize certified SBE firms to meet the project specific goals.
31. "Partnership or Association" - A short-term business association—a partnership or association—consisting of certified SBE firm(s) and non-SBE firm(s) or certified SBE firms formed to carry on a single business activity which is limited in scope and duration, which the parties jointly undertake for a transaction, for which they combine their property, capital, efforts, skills, and knowledge. Generally, each party will contribute assets and share risks. Partnerships or Associations can involve any type of business transaction and the parties involved can be individuals, groups of individuals, companies, or corporations. For the purposes of this policy, Partnerships and Associations are held to all the same standards as Joint Ventures with the exception of the requirement that the businesses form a separate legal entity.
32. "Pre-Bid Meetings" or "Pre-Proposal Meetings" – A meeting held for respondents to gather information about a solicitation prior to the response due date.
33. "Prime" – A person or firm who is qualified and responsible for the entire project, who may have one or more subcontractors or subconsultants, and with whom the City, County, or Blueprint has a direct contractual relationship. A prime contractor provides goods or performs a service not governed by section 287.055, Florida Statutes. A prime consultant performs professional architectural, engineering, landscape architectural, or surveying and mapping services governed by section 287.055, Florida Statutes.
34. "Principal Place of Business" – A location wherein a firm maintains a physical office and through which it obtains no less than fifty percent (50%) of its overall customers or sales dollars.
35. "Present Business Relationship" – A shared space, equipment, financing, employees, or both firms having some of the same owners.
36. "Project specific goals" – The percentage of SBE participation for a particular procurement opportunity.

37. “Purchasing” or “Procurement” - Buying, renting, leasing or otherwise obtaining or acquiring any goods, supplies, materials, equipment, or services.
38. “Regular Dealer” – A firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials, supplies, articles or equipment of the general character described by the specifications and required under the contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. To be a regular dealer, the firm must be an established, regular business that engages, as its principal business and under its own name, in the purchase and sale or lease of the products in question.
    (a) A person may be a regular dealer in such bulk items as petroleum products, steel, cement, gravel, stone, or asphalt without owning, operating, or maintaining a place of business as provided in this paragraph if the person both owns and operates distribution equipment for the products. Any supplementing of regular dealers' own distribution equipment will be by a long-term lease agreement and not on an ad hoc or contract-by-contract basis.
    (b) Packagers, brokers, manufacturers' representatives, or other persons who arrange or expedite transactions are not regular dealers within the meaning of this paragraph.
39. “Reserved” – A contracting practice restricting eligibility for the competitive award of a contract solely to SBE firms.
40. “Respondent” – The person or party that responds to a solicitation.
41. “Response” – A bid, proposal, statement of qualifications, or other response to a solicitation.
42. “Small Business Enterprise” (SBE) – A firm whose SBE Certification is recognized, effective, and accepted by the Office of Economic Vitality, and has 200 or fewer permanent full-time employees and, together with its affiliates, has a net worth of not more than $5 million.
43. “Small Business Enterprise Program” (SBE Program) – Those components of this policy that target increased participation of SBE firms in City, County, and Blueprint procurement, including the coordination with other entities and agencies that assist small businesses through various means such as education and networking.
44. “Solicitation” – Any request for proposals, request for qualifications, invitation for bids, invitation to bid, or other document issued by the City, County, or Blueprint seeking goods or services.
45. “Solicitation Development Meeting” – An internal staff meeting to create and develop solicitations and discuss potential SBE goals, SBE reserved or unbundling, or other elements of this policy applicable to the solicitation under development.
46. “Subcontract” - Any agreement, arrangement, or understanding, written or otherwise, between a prime contractor or consultant and any party (in which the parties do not stand in relationship of employer and employee) which assigns some of the obligations of the contract:
    a) For the furnishing of supplies or services or for the use of real personal property; including lease arrangements which, in whole or in part, are utilized in the performance of one or more contracts with the City, County, or Blueprint; or
    b) Under which any portion of the prime’s obligation under one or more contracts with the City, County, or Blueprint is performed, undertaken, or assumed.
47. “Supplier” - A business that furnishes needed items to a prime contractor or consultant, and (i) is either involved in the manufacture or distribution of the supplies or materials; or (ii) otherwise warehouses and ships the supplies.
48. “Tallahassee-Leon County Citizens Advisory Committee” - Consists of eleven members: four appointed by the County Commission, four appointed by the City Commission, and one nominated appointee each from the Big Bend Minority Chamber of Commerce, Capital City Chamber of Commerce, and the Greater Tallahassee Chamber of Commerce. Members serve two-year terms with vacancies being filled for the remainder of a term; and, reappointments will be

limited to three consecutive terms. The Committee will be chaired by a Chairperson nominated and elected by the members of the Committee.

49. "Unbundle" – The act of separating projects or large projects into smaller projects which may be more suitable for SBE participation.

VI. ORGANIZATION AND RESPONSIBILITY

A. City of Tallahassee City Commission, Leon County Government, and IA Board

The City of Tallahassee City Commission, Leon County Government, and IA Board are responsible for policy decisions as they relate to the SBE Program.

B. Intergovernmental Management Committee (IMC) and Director of PLACE

The IMC, consisting of the City Manager and County Administrator, and the Director of PLACE are responsible for:

1. The administration of the SBE Programs.
2. Promulgation of any amendments to this policy to ensure consistency with any law, regulation, or grant requirement.

C. Office of Economic Vitality

OEV is responsible for:

1. The administration and management of the SBE Programs on a day-to-day basis, including organizing or participating in pre-solicitation development meetings with City, County, and Blueprint.
2. Certification of SBE firms.
3. Scoring of components of solicitations.
4. Receiving and evaluating quarterly SBE Participation Reports and providing a quarterly and annual report on SBE participation.
5. Reviewing forthcoming City, County, and Blueprint solicitations to generate an awareness by SBE firms of potential opportunities.
6. Providing technical assistance and training to SBE firms to facilitate a better understanding of solicitation and contracting procedures.
7. Maintaining communication with contractor's associations, the construction industry, financial institutions, community organizations, and businesses in general.
8. Monitoring of City, County, and Blueprint contracts with SBE participation and assisting in resolution of contract problems.
9. Creating project specific SBE goals on a case-by-case basis, considering the availability of SBE firms in each contracting and procurement category.
10. Establishing written procedures to implement the SBE Programs, including the certification of businesses as SBE firms.
11. Assessing the certification applications for the SBE Program and coordinating certifications with the City, County, and Blueprint.
12. Maintaining a database of SBE firms and providing assistance to City and County departments and Blueprint in identifying SBE firms for anticipated procurements.

13. Establishing realistic aspirational project specific goals.
14. Identifying procurement opportunities for competition among SBEs.
15. Monitoring the utilization of SBEs and the progress of the SBE Program to ensure that SBEs have opportunities to participate in City, County, and Blueprint procurement of goods and services, and report on the progress of the SBE Program at least annually.
16. Implementing mechanisms and procedures for monitoring utilization of SBEs in accordance with contract requirements.
17. Performing outreach by networking with state and local government, nonprofit, professional, and trade organizations and participating in conventions and seminars sponsored and widely-attended by SBE firm owners.
18. Complying with this policy.

D. City Procurement Services Division and County Purchasing Division

The City Procurement Services Division and County Purchasing Division are responsible for:

1. Obtaining project-specific goals for each solicitation from OEV before the solicitation is advertised to the public, including organizing or participating in pre-solicitation development meetings.
2. Organizing pre-solicitation development meetings and pre-bid or pre-proposal meetings.
3. Notifying OEV of Change Orders and other contract compliance information that affect SBE firms.
4. Maintaining accurate data in the contract compliance process and electronic tracking system.
5. Accepting recommendations to initiate debarment procedures for violations of this policy.
6. Complying with this policy.

E. City and County Departments, Blueprint, and Appointed Officials

City and County departments, Blueprint, and appointed officials are responsible for:

1. Assisting in the promotion of the SBE Programs and participating in the SBE Programs.
2. Coordinating with OEV to improve the utilization of SBE firms within each entity.
3. Utilizing the SBE Directory and documenting effort to secure SBE participation.
4. Reporting SBE utilization for entry into the contract compliance process and electronic tracking system.
5. Complying with this policy.

F. Citizens Advisory Committee

The Citizens Advisory Committee is responsible for:

1. Monitoring the progress of the SBE Program toward achieving program performance goals established by the City Commission, Board of County Commissioners, and the IA Board.
2. Reviewing and providing SBE policy alternatives, as well as providing programmatic recommendations relative to seeking resolution of disputes regarding Certification.
3. Scheduling and implementing meetings which will be noticed and open to the public; recording and maintaining minutes of any such meetings.

VII. SBE ASPIRATIONAL GOALS

To ensure that SBE firms in the Market Area have equal opportunity to engage in City, County, and Blueprint business, the SBE Program encourages respondents to engage SBE firms as subcontractors or subconsultants in responses to City, County, and Blueprint solicitations. Each solicitation that is capable of being broken down into work that may be sublet will be issued with a project specific SBE goal set by OEV. Respondents are required to meet the project specific goal or provide documentation of their good faith effort to engage SBE firms.

The City, County, and Blueprint are responsible for maintaining accurate records documenting all spending with prime contractors and consultants and subcontractors and subconsultants. Therefore, uploading accurate and complete data in the City, County, and Blueprint contract compliance process and electronic tracking system is a necessary component of the SBE Program. Accurate and complete data is necessary for the creation of SBE Aspirational Goals.

A. Pre-Bid Meetings

Pre-bid meetings will be mandatory if an aspirational goal is assigned. If no goal is assigned, then a pre-bid meeting may be optional. Pre-bid meetings may be conducted in person or virtually. The time and date for any pre-bid meeting shall be as stated in the solicitation document or addendum. Subcontractors may attend the pre-bid meeting.

B. Basis of Project Specific Goals

Each project-specific goal is based on both the current availability of SBE firms in the Market Area and an aspirational goal intended to include the utilization of SBEs. The SBE aspirational goals were developed based on data received from City, County, and Blueprint for contracts under $5 million dollars over the last three years. The SBE aspirational goals are intended to meet the level of SBE availability in the Market Area.

TABLE 1
SBE ASPIRATIONAL GOALS

Procurement Category	**Aspirational SBE Goal**
Construction Subcontractors	15%
Architecture & Engineering	15%
Professional Services	15%
Other Services	15%
Material and Supplies	7%

C. Project Specific Goals

The SBE Program is intended to ensure utilization of SBE firms in all aspects of City, County, and Blueprint procurement activity and to award contracts with SBE participation consistent with the SBE aspirational goals. In furtherance of that intent, project-specific SBE goals will be established for each solicitation with the goal of achieving overall SBE participation as outlined in **Table 1**. Only the dollars expended with certified SBE firms from the local Market Area will be counted towards satisfying the project specific SBE goals. More details on counting SBE utilization can be found in **Section XI.**

1. City and County Departments and Blueprint will plan their solicitations to provide ample time for OEV to establish project specific goals for inclusion into each solicitation, where feasible, before the City Procurement Services Division and Leon County Purchasing Division advertise the solicitation to the public.
2. City Procurement Services and County Purchasing Divisions will obtain a project specific goal established for each individual solicitation from OEV before the solicitations are advertised to the public.
    a. As part of the creation of a solicitation document, City, County, and Blueprint project managers will make an effort to identify components in the solicitation's scope of work or scope of services that may reasonably be performed or supplied by a subcontractor or subconsultant and the percentage of the total contract value that those components represent. City, County, and Blueprint project managers will promptly notify the purchasing agent—the responsible employee of the City Procurement Services or County Purchasing Division—of the percentage identified above and the type of work included in that percentage.
    b. City Procurement Services and County Purchasing Divisions will schedule a pre-solicitation development meeting including OEV. Pre-solicitation development meetings may occur in person or via teleconference, video conference, email, or other technology. Following pre-solicitation development meetings, OEV will report the project specific goals to the City Procurement Services or County Purchasing Divisions. Project specific goals may be lower than the aspirational goals or may be inappropriate for a particular solicitation as described below.
3. The project specific goals for individual solicitations may be higher or lower than the aspirational goals identified in **Table 1** and should reflect realistic SBE availability for a particular project. OEV will determine project specific goals for each solicitation based on contract compliance and supplier diversity industry standards.
4. Project specific goals are considered the minimum level of SBE participation expected for a particular procurement. Project specific goals are considered targets set to achieve participation levels commensurate with available businesses, and for which there are opportunities for exemptions based upon good faith effort.
5. Project specific goals will be reasonable and give consideration to both subcontracting opportunities and the availability of SBE firms in the Market Area who are capable of performing the work.
6. Project specific goals may not be appropriate when subcontracting is not reasonable or permitted. Where OEV has determined that project specific goals are not appropriate for a solicitation, OEV will notify the Procurement Services or Purchasing Director that it has recommended no project specific goals or project specific goals lower than the aspirational goals.
7. In the event of an emergency purchase under the City Purchasing Manual Section 3.12 or County Purchasing Policy No. 96-1 Section 5.11, project specific goals may be waived.
8. In cases where it is not reasonable to set project specific goals, OEV may encourage SBE participation through respondent's purchase of goods or services from SBE firms, consistent with the project specific goals, or provide for any combination thereof.
9. Project specific goals will apply to all respondents, including SBE firms when an SBE firm is the prime contractor or consultant.
10. To meet project specific goals, all City and County departments and Blueprint will cooperate with

OEV and make every reasonable effort, consistent with this policy, to utilize SBE firms when available. OEV will coordinate and promote the process by taking active steps to encourage full participation of certified SBE businesses and by keeping staff informed of SBE availability.

a. Each department will be responsible for obtaining SBE participation at the minimum level identified in **Table 1**. All purchases for goods and services will be made in conformance with the City and County Purchasing Manuals.
b. OEV will annually evaluate relevant expenditure and contracting data to determine the performance and progress of the SBE Program with the assistance of the City and County Budget Offices, City Procurement Services Division and County Procurement Division, and any other applicable departments.

D. Good Faith Effort Documentation

In those instances where a respondent has failed to meet the SBE goals in whole or in part at the time of response submittal, there is a rebuttable presumption that SBE firms were available for the project. The burden of proof then shifts to the respondent to rebut this presumption through documentation of its good faith effort (GFE). In those cases, the respondent—even a respondent that is a certified SBE firm or a non-SBE firm participating in a Joint Venture, Partnership, and Association; Mentor-Protégé; or Apprenticeship arrangement—must submit documentation of GFE with the response to the solicitation.

Each of the following activities is worth 10 points towards documentation of GFE. A combination of the following activities reaching a minimum of 50 points will demonstrate GFE:

1. Attendance at pre-bid or pre-proposal meetings, if applicable.
2. Submission of copies of written correspondence to OEV no later than fifteen (15) business days before the solicitation response deadline seeking help in identifying firms available to meet the project specific goals.
3. Submission of copies of advertisements placed by the respondent in the local newspaper in the Market Area announcing the project and seeking SBE participation.
4. Submission of copies of written correspondence sent to certified SBE firms. The correspondence should include:
   a. The specific work the contractor intends to subcontract;
   b. That interest in participation by the SBE firm on the contract is being solicited; and,
   c. How to obtain information for the review and inspection of contract plans and specifications.
5. Submission of documentation that the respondent selected economically feasible portions of work to be performed by SBEs, including, where appropriate, breaking down contracts or combining elements of work into economically feasible units. (The ability of the contractor to perform the work with its own work force will not in itself excuse a contractor from making positive efforts to meet contract goals).
6. Submission of documentation that the respondent negotiated in good faith with interested SBE firms and did not reject any interested SBE firms without sound business reasons. Price alone does not constitute a sound business reason unless the respondent can demonstrate that no reasonable price can be obtained from an SBE firm.
7. Submission of documentation that the respondent reviewed all quotations received from SBE firms, and for those quotations not accepted, an explanation of why the SBE will not be used during the course of the contract. (Receipt of a lower quotation from a non-SBE will not in itself excuse a contractor's failure to meet contract goals).

8. Submission of documentation detailing respondent's effort to contact SBE firms who provide the services needed for the solicitation and indicating that the respondent provided no less than 10 days for potential SBE firms to respond, including a chart outlining the methods of contact and schedule or time frame in which respondent conducted its good faith effort.
9. Submission of documentation that the respondent offered to provide interested SBE firms with assistance in reviewing the solicitation plans and specifications at no charge to the SBE firms.
10. Submission of documentation of follow-up telephone calls with potential SBE firms encouraging their participation.

Respondents should contact OEV immediately for guidance and assistance in any of the following events: (1) the respondent anticipates or has difficulty identifying an SBE firm to meet project specific goals; (2) the respondent cannot identify portions of the work that can be contracted to SBE firms; or (3) the respondent determines that contracting portions the work to another entity is not possible.

E. Evaluating SBE Participation in Solicitations

Every City, County, or Blueprint solicitation issued with project specific goals will contain language and forms describing how respondents must demonstrate their utilization of SBE firms to meet the project specific goals for SBE participation.

1. Responsiveness for All Solicitations

OEV will review for responsiveness all responses to solicitations that are assigned project specific goals during the solicitation development process. This includes both solicitations that involve the scoring of points and solicitations awarded based primarily on price. OEV will deem responses responsive to the SBE section of the solicitation if they include a completed SBE Participation Plan that is eligible for points and/or Good Faith Effort documentation. As described below, responses that do not include an SBE Participation Plan or that include an incomplete SBE Participation Plan that is not eligible for points may be deemed responsive to the SBE portion of the solicitation if they include Good Faith Effort documentation.

TABLE 2
SBE RESPONSE EVALUATION: RESPONSIVENESS

SBE Response Evaluation: Responsiveness	
Recommendation	**Response**
RESPONSIVE	• Completed **SBE Participation Plan** and **SBE Section** that is eligible for full points; • Completed **SBE Participation Plan** and **SBE Section** that is eligible for partial points and completed **Good Faith Effort documentation** demonstrating why respondent could not meet the full project specific goal**; OR** • Completed **Good Faith Effort documentation**.
NON-RESPONSIVE	• Completed **SBE Participation Plan** and **SBE Section** that is eligible for partial points but no **Good Faith Effort documentation** demonstrating why respondent could not meet the full project-specific goal; • An **SBE Participation Plan** that is incomplete, unsigned, or otherwise ineligible for points and no **Good Faith Effort documentation; OR** • No **SBE Participation Plan** or completed **Good Faith Effort Documentation.**

Upon evaluation of all responses to a solicitation, OEV will inform the Purchasing or Procurement Division of its evaluation of responsiveness to the SBE portion of the solicitation. Responses that do not meet the above criteria may be deemed non-responsive by the Purchasing or Procurement Division and be ineligible for award. The Purchasing or Procurement Divisions' determinations of responsiveness will be governed by the applicable Purchasing Manual or Procurement Policy of the appropriate entity (City, County, or Blueprint).

2. Point Evaluation for Scored Solicitations (CCNA Professional Services)

For solicitations seeking professional services governed by the Florida Consultants' Competitive Negotiations Act (CCNA)—professional architectural, engineering, landscape architectural, or surveying and mapping services—that have project specific goals, OEV will award points during the solicitation evaluation process. OEV may award points for an SBE Participation Plan and associated documents demonstrating the following: **(1)** committing to utilizing a certified SBE firm or firms holding an SBE certification in conformance with the project specific goals, monitoring requirements, and the requirements of this policy; and **(2)** identifying the certified SBE firm(s). Points will be identified in each solicitation. As of the date of the adoption of this policy, Section 287.055, Florida Statutes (the CCNA) remains in full force and effect and nothing in this Policy shall be construed to supersede, limit, or replace its requirements. For every procurement governed by the CCNA, Blueprint, the County and the City shall confer as to ways to continue to comply with all applicable procedures and requirements of Section 287.055, Florida Statutes.

3. Point Evaluation for Scored Solicitations (All Other Services)

For solicitations seeking other services not governed by CCNA, for which the solicitation evaluation process involves scoring and has project specific goals, OEV will award points during the solicitation evaluation process. Each solicitation will identify the points associated with the SBE section of each solicitation.

Generally, the maximum number of points available for the SBE section of solicitation is a total of **15 points**.

A total of **10 points** can be awarded for an **SBE Participation Plan**:

a. Submission of an **SBE Participation Plan** will earn **10 points** for meeting the following requirements: **(1)** utilizing an SBE firm or firms holding an SBE Program certification; **(2)** meeting the project specific goal based on percentage of the contract value paid to the SBE firm(s); and **(3)** agreeing to monitor the work of the SBE firms, provide subcontractor and subconsultant payment information to OEV.

b. Submission of an **SBE Participation Plan** will earn **5 points** if it meets **(1)** and **(3)** above but only meets a portion of the project specific SBE goal in **(2)** above. Such responses must include **Good Faith Effort documentation** demonstrating why respondents could not meet the full project specific goal to remain responsive.

Demonstrating one or more of **Joint Venture, Partnership, and Association; Mentor-Protégé; or**

apprenticeship or externship relationships may earn an additional **5 points.**

Table 3 on the next page indicates the points available for an SBE scoring for non-CCNA solicitations.
Table 4 on the next page lists all possible SBE score outcomes and how they may be obtained.

TABLE 3
SBE EVALUATION

SBE Evaluation: Scoring	
Score	**Response**
5 Points	SBE Participation Plan demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship relationship with an SBE firm is eligible to earn 5 points
5 Points	An SBE Participation Plan that meets the following requirements is eligible for 5 Points: 1. Utilizing an SBE firm or firms holding an SBE certification. 2. Meeting a portion of the project specific goals for SBE utilization based on the percentage of the contract value ultimately paid to SBE firms. 3. Agreeing to monitor the work of the SBE firms, provide subcontractor and subconsultant payment information to OEV.
10 Points	An SBE Participation Plan that meets the following requirements is eligible for 5 Points: 1. Utilizing an SBE firm or firms holding an SBE Program certification. 2. Meeting the project specific goals for SBE utilization based on the percentage of the contract value ultimately paid to SBE firms. 3. Agreeing to monitor the work of the SBE firms, provide subcontractor and subconsultant payment information to OEV.

TABLE 4
SBE SCORE OUTCOMES

SBE Score Outcomes	
Score	**Response**
5 Points	SBE Participation Plan demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship, but the SBE Participation Plan is ineligible for 5 or 10 points. **Good Faith Effort documentation demonstrating why respondents could not meet the project specific goal is necessary for responsiveness**.
5 Points	Submission of an SBE Participation Plan that demonstrates (1) utilization of a certified SBE firm, (2) meets a portion of the project specific goals (3) agreeing to monitor work of other SBE firms. Does not demonstrate Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship. **Good Faith Effort documentation demonstrating why respondents could not meet the project specific goal is necessary for responsiveness**.
10 Points	Submission of an SBE Participation Plan that demonstrates (1) utilization of a certified SBE firm, (2) meets a portion of the project specific goals for SBE utilization, (3) agreeing to monitor. Also demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship. **Good Faith Effort documentation demonstrating why respondents could not meet the project specific goal is necessary for responsiveness**.
10 Points	Submission of an SBE Participation Plan that demonstrates (1) utilization of a certified SBE firm, (2) meets the project-specific goals for SBE utilization, and (3) agrees to monitor. Does not demonstrate Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship.
15 Points	Submission of an SBE Participation Plan that demonstrates (1) utilization of a certified SBE

	firm, (2) meets the project-specific goals for SBE utilization, and (3) agrees to monitor. Also demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship.

F. Substitutions or Replacements

It is the intent of this policy to ensure that SBE firms identified by respondents in their responses are the firm(s) with which the respondents actually do business as prime contractors or consultants. However, the prime may, under specific circumstances and for good cause, substitute or replace the original certified SBE firm with another certified SBE firm. Such substitution will only be made with the prior approval of OEV based on a written statement of good cause. The substitution or replacement must not result in SBE participation lower than provided for in the original response and the substitution will not dramatically affect the percentage distribution by SBE groups. A prime that substitutes SBE firms without the prior written approval of OEV may be subject to penalties.

The OEV will not count dollars spent with an unauthorized SBE firm for satisfaction of the SBE goal. The prime will remain responsible for meeting the SBE goals as stated in the original contract.

1. For purposes of this policy, good cause includes, but is not limited to the following circumstances:
    a. The listed SBE firm fails or refuses to execute a written contract;
    b. The listed SBE firm fails or refuses to perform the work of its subcontract in a way consistent with normal industry standards;
    c. The listed SBE firm becomes bankrupt or insolvent;
    d. The listed SBE firm is ineligible to work on public works projects because of suspension and/or debarment proceedings in accordance with City/County ordinances or applicable state law;
    e. The City or County has determined that the listed SBE firm is not a responsible contractor;
    f. The listed SBE firm voluntarily withdraws from the project and provides to you written notice of its withdrawal;
    g. The listed SBE firm is ineligible to receive SBE credit for the type of work required;
    h. SBE firm owner dies or becomes disabled with the result that the listed SBE firm is unable to complete its work on the contract; or,
    i. Other documented examples of good cause submitted to OEV justifying the termination of the SBE firm.
2. Good cause does not exist if the failure or refusal of an SBE firm to perform work results from bad faith or discriminatory action of the prime; if the prime seeks to substitute, replace, or terminate the SBE to self-perform the SBE contractor's portion of work, or to substitute another SBE or non-SBE after contract award without prior written approval from the SBE.
3. Before submitting a request to terminate and/or substitute a SBE firm, the prime contractor must give notice in writing to the SBE firm, with a copy to the appropriate OEV staff, of its intent to request to terminate and/or substitute, and the reason for the request.

G. Change Orders

The Procurement Services or Purchasing Division or City, County, or Blueprint project manager responsible for the contract work will notify OEV of all change orders on contracts with SBE participation that alter payment to, and work performed by any SBE firm. This information should be recorded through the contract compliance process and electronic tracking system. Accurate data and accurate reporting ensure narrow tailoring of the SBE Program.

H. Bad Faith or Dishonesty in the Response

Bad faith or dishonesty in violation of the SBE Program in the response to a solicitation will be grounds for penalty as provided under **section VII.J** below. Examples of bad faith or dishonesty in the response include but are not limited to the following:

1. Knowingly and willfully submitting an SBE Participation Plan that includes false or misleading information for the purpose of winning a contract.
2. Knowingly and willfully submitting an SBE Participation Plan that the respondent has no intention of following once the contract has been awarded.
3. Failure to utilize an SBE firm that was originally listed in a response to a solicitation to satisfy project specific goals, unless the respondent meets the requirements governing substitutions and replacements.

I. Contract Compliance

The contract compliance process and electronic tracking system will have the ability to produce compliance, labor, and contract management reports to the City, County, and Blueprint, and to other stakeholders.

1. The City, County, and Blueprint will incorporate in their procurement contracts that all prime contractors and consultants, subcontractors and subconsultants, and SBE subcontractors and subconsultants must maintain records for the period prescribed by Florida law and record retention policy after contract performance. All parties must make these records available for inspection by OEV and the City, County, and Blueprint.
2. Prime contractors and consultants are required to maintain records of all progress payments that they have made. OEV will periodically review and verify these records by obtaining certified statements from subcontractors or subconsultants.

J. Monitoring and Enforcement Mechanisms

OEV will monitor and enforce this policy utilizing the following measures:

1. The designated OEV staff member will attend the post award project meeting, that is, the preconstruction or kickoff meeting. Note: In some instances of professional services contracts, a post award meeting may not be held. At such a meeting, OEV staff will discuss any SBE questions and/or procedures and ascertain any corrections or adjustments in the project schedule.
2. An OEV staff member determines, based upon the work that the SBE firm is to perform and the project schedule, a schedule for random on-site monitoring. This on-site monitoring verifies the work performed by those contracted SBE firms.
3. On site monitoring will be performed as applicable by OEV staff, construction inspectors, or project managers or their designees. Observations of the onsite visit will be documented on a monitoring checklist form. The form is to be completed, signed and dated by the staff person conducting the site visit.
4. Upon request of OEV staff, the prime must provide invoices or other documentation of payment to SBE firms. OEV staff will review the documentation submitted and check for SBE participation. For contract compliance purposes, OEV staff may contact the SBE subcontractor to verify appropriate work and payment.

5. When a project involving SBE participation is completed and closed, the responsible department will notify OEV and provide any information regarding changes in the scope or size of the project that affect SBE participation.
6. Any additional fact-finding which may be deemed necessary due to a lack of proper recordkeeping; failure of the prime contractor to cooperate; failure of SBE(s) to cooperate; or visible evidence of unsatisfactory performance; and may warrant further investigation.

K. Penalties and Remedies for Non-Compliance of Prime Contractors or Consultants

Penalties for non-compliance of prime contractors or consultants may include any and/or all of the following:

1. Withholding payment for work not completed on the project until OEV determines that the prime contractor or consultant has complied with this policy as provided by contract. OEV will set forth the basis for any such withholding in a written notice of non-compliance.
2. If the prime contractor or consultant is an SBE firm, the prime contractor or consultant may lose its SBE Program certification for a period not to exceed three years at the discretion of OEV, as set forth in a written notice of non-compliance.
3. If OEV determines that evidence exists indicating a violation in a response as described above, OEV will issue a written notice of non-compliance and may recommend that the City Procurement Services Division or County Purchasing Division disqualify a prime contractor or consultant from further consideration for award.
4. If OEV determines that evidence exists indicating that fraud or other unlawful activity has been committed by a certified SBE or prime contractor or consultant, such as falsely reporting the utilization of SBE firms; or by an individual or firm attempting to benefit from or participate in the SBE Program, through fronting activity, false representation of a commercially useful function (CUF), or other fraudulent or unlawful activity, the matter will be referred to the appropriate legal authorities for prosecution and the City, County, or Blueprint Attorney's Office will be notified as appropriate. In the event that a conviction or guilty plea is obtained stemming from such criminal prosecution, OEV will issue a written notice of non-compliance and recommend that the Procurement Services Manager or Purchasing Director initiate procedures to bar or suspend the entity from participation in City, County, or Blueprint contracts.
5. If OEV determines that evidence exists indicating non-compliance that does not rise to the level of fraud or other unlawful activity by a certified SBE or prime contractor or consultant, OEV will issue written notice of the non-compliance and make a recommendation to the Procurement Services Manager and/or Purchasing Director to initiate procedures to bar the firm and its principals from participation in City, County, or Blueprint contracts.

L. Notice of Non-compliance Right of Appeal

1. A prime contractor or consultant in receipt of a written notice of non-compliance will have the right to appeal. The prime contractor or consultant must file an appeal in writing to the Office of Economic Vitality Director within seven (7) business days of receipt of the written notice of non-compliance. Failure to file a timely appeal will be considered a waiver of the prime contractor or consultant's right to appeal the decision of OEV.
2. The written appeal will indicate reason(s) and provide additional information, if appropriate, as to why the prime contractor or consultant believes the notice of non-compliance was issued in error.
3. OEV will provide a written response acknowledging receipt of the correspondence to the prime

contractor or consultant within seven (7) business days upon receipt of the formal appeal.

4. The Office of Economic Vitality Director will review the appeal and render a written final decision within thirty (30) calendar days of receipt of the formal appeal. This review by OEV Director is the final step available in the administrative process for an appeal of a notice of non-compliance.

VIII. RESERVED PROJECTS AND UNBUNDLING

A. Reserved Projects

1. Where feasible, the City, County, and Blueprint may reserve contracts for competition among only certified SBE firms.

2. If no SBE firms respond to a solicitation for reserved projects or the responses submitted are deemed too high or unreasonable based upon the nature of the service or prices for similar services in the local Market Area, then all responses will be rejected, and the project will be re-advertised in the normal manner to all prospective respondents with no reservation for SBE firms.

B. Unbundling

The City, County, and Blueprint, where feasible, may "unbundle" projects or separate large projects into smaller projects which may be more suitable for small business participation. OEV will review selected solicitations to determine whether portions of the project could be unbundled and advertised separately as part of the solicitation development meetings arranged by the City Procurement Services and County Purchasing Divisions. This determination will be made based on the estimated availability of small businesses able to provide specific scopes of work and will consider any economic or administrative burdens which may be associated with unbundling. OEV will also monitor whether federally funded projects may be unbundled and advertised through separate solicitations.

C. Rotation System

The City, County, and Blueprint will use its best efforts to implement a rotation system for the selection of firms for services to be provided under a continuing services agreement. Selection of a firm is within the discretion of the City, County and Blueprint and the selection of the firm may be based on factors which may include the following: the expertise and skill set needed for certain projects; the availability of the firm to meet the project schedule; specific contract requirements; and the competitiveness of the firm's quote for the services.

IX. MENTOR-PROTÉGÉ AND JOINT VENTURE, PARTNERSHIP, AND ASSOCIATION

The City, County, and Blueprint encourage Mentor-Protégé relationships and Joint Venture, Partnership, and Association to afford prime contracting and consulting opportunities for SBE firms on City, County, and Blueprint projects. Where applicable, Mentor-Protégé relationships and Joint Ventures, Partnerships, and Associations will be worth 5 points towards a respondent's SBE Score.

A. Mentor-Protégé Relationship

A Mentor-Protégé relationship exists when an experienced company, firm, or individual (Mentor) provides assistance and training to an SBE firm (Protégé). The Mentor-Protégé relationship can range from technical or management assistance to the creation of a new agreement or jointly owned firm. No firm will be penalized based upon its participation or nonparticipation in a Mentor-Protégé Program.

1. The Protégé in any proposed Mentor-Protégé relationship must be a certified SBE firm before application for approval of the Mentor-Protégé relationship.
2. For purposes of making determinations of business size under this section, OEV will not treat Protégé firms as affiliates of Mentor firms, when both firms are participating in an approved Mentor-Protégé Program.
3. The common forms of assistance that a Mentor may provide a Protégé include:

Business Planning	Financial Counseling
Record Keeping	Bonding Technical Assistance
Equipment Utilization	Capital Formation

B. Mentor-Protégé Requirements

The OEV may approve a Mentor-Protégé relationship in all applicable industries in which Mentor assistance is needed to develop capacity in the Protégé SBE firm. A Mentor and Protégé may request SBE Division approval of their Mentor-Protégé relationship by submitting annually the Mentor Protégé development plan form. The Mentor-Protégé relationship will initially be limited to three (3) years, with two possible one (1) year extensions, for a maximum of five (5) years. OEV will approve in writing for a period of one (1) year from the date of approval Mentor-Protégé relationships that have demonstrated the following requirements:

1. The Protégé must be certified with OEV as an SBE firm before entering into a Mentor-Protégée relationship. The Protégé must continue to meet all SBE certification criteria to remain eligible for Mentor-Protégé relationship approval.
2. The Mentor and Protégé must be separate firms. Compensation to the Protégé should be relative to the amount of work accomplished rather than an hourly basis.
3. In general, a Mentor may be involved in up to three Mentor-Protégé relationships. A Protégé can only be involved in one Mentor-Protégé relationship.
4. Each year, the Mentor and Protégé will prepare a three-year development plan using the form approved by OEV. The development plan will include the following information about the Mentor and Protégé:
   (a) information on the background and experience of the Protégé owners;
   (b) the number of and types of personnel;
   (c) the amount of capital;
   (d) the number, types and values of equipment;
   (e) and the amount and types of projects to be pursued
5. The Mentor and Protégé will annually update and submit the Mentor-Protégé development plan to OEV, documenting progress of the Protégé in each category and summarize the work accomplished.

C. Monitoring of Mentor-Protégé Relationships

OEV will conduct an annual review of each Mentor-Protégé relationship. If OEV determines that the Mentor and/or Protégé are not complying with this policy or if the Mentor and Protégé have not submitted their annual Mentor-Protégé development plan form, OEV will issue a written notice of noncompliance and the Mentor and Protégé will have seven (7) business days to cure. If the Mentor and Protégé fail to respond to the notice of noncompliance or fail to cure noncompliance, OEV will issue written notice of ineligibility to respond to City, County, and Blueprint solicitations as having a Mentor-Protégé relationship.

D. Joint Venture, Partnership, and Association

A Joint Venture is a joint business association—a separate legal entity like a corporation or LLC—consisting of one certified SBE firm and one non-SBE firm or two certified SBE firms formed to carry on a single business activity which is limited in scope and duration. A Joint Venture must include at least one SBE firm.

A Partnership or Association is a joint business partnership or association that does not require formation of a legal entity separate from its component firms and that consists of one certified SBE firm and one non-SBE firm or two certified SBE firms formed to carry on a single business activity which is limited in scope and duration. A Partnership or Association must include at least one SBE firm.

E. Joint Venture, Partnership, and Association Requirements

1. In the case of a Joint Venture, Partnership, or Association consisting of one SBE firm and one non-SBE firm, as used in this policy, the smaller firm will comprise a minimum of ten (10%) of the association and will receive a share of contract dollars proportionate to the percentage of participation that the smaller firm represents in the Joint Venture, Partnership, or Association. In the case of a Joint Venture, Partnership, or Association consisting only of certified SBE firms, the ten percent (10%) participation requirement will also apply.
2. When a Joint Venture, Partnership, or Association is proposed, OEV will review and approve a signed and completed Joint Venture, Partnership, and Association Affidavit and all contractual agreements regarding a proposed Joint Venture, Partnership, or Association. OEV will determine the degree of SBE participation resulting from the Joint Venture, Partnership, and Association Affidavit and all agreements, which may be credited toward the evaluation of its response to a solicitation. This determination will be based on the clearly defined roles of the Joint Venture, Partnership, or Association partners, sharing of real economic interest, and proportionate control of the ownership and management of the Joint Venture, Partnership, or Association.
3. The Joint Venture, Partnership, or Association will be responsible for meeting project specific goals and complying with all applicable state and local laws, rules, and regulations governing Joint Venture creation, certification, and bidding.
4. The Joint Venture, Partnership, or Association responses to solicitations will include a section identifying all firms, the percentage ownership of each firm, and clearly defined scopes of services to be provided by each firm in the Joint Venture on the project.
5. For the SBE firm to remain eligible for Joint Venture, Partnership, and Association participation, it must continue to meet all SBE eligibility criteria contained in this policy.

F. Monitoring of Joint Venture, Partnership, and Association

OEV will conduct an annual review of each Joint Venture, Partnership, and Association agreement. If OEV determines that the Joint Venture, Partnership, or Association is not following the requirements of this Policy, OEV will issue a written notice of noncompliance and the Joint Venture, Partnership, or Association will have seven (7) business days to cure. If the Joint Venture, Partnership, or Association fails to respond to the notice of noncompliance or fails to cure the alleged noncompliance, OEV will issue written notice of ineligibility to the Joint Venture, Partnership, or Association that it is no longer eligible to respond to City, County, and Blueprint solicitations as a Joint Venture, Partnership, or Association.

G. Notice of Ineligibility Right of Appeal

5. A Mentor and Protégé or Joint Venture, Partnership, or Association in receipt of an OEV written notice of ineligibility will have the right to appeal. The Mentor and Protégé or Joint Venture, Partnership, or Association must file an appeal in writing to OEV within seven (7) business days of receipt of the notice of ineligibility.
6. The written appeal will indicate reason(s) and provide additional information, if appropriate, as to why the business believes the notice of ineligibility was error.
7. OEV will provide a written response acknowledging receipt of the correspondence to the business within seven (7) business days upon receipt of the formal appeal.
8. Failure to file with OEV within the prescribed time frame will constitute a waiver of proceedings under this section. OEV will schedule a review within thirty (30) calendar days of receipt of the appeal. This review by OEV is the final step available in the administrative process for an appeal of a notice of ineligibility.
9. A firm whose appeal has been denied may re-apply six months after final denial notice.

X. APPRENTICESHIP OR EXTERNSHIP

An apprenticeship or externship program is a tried-and-true approach for preparing workers for jobs – and meeting the business needs for a highly-skilled workforce that continues to innovate and adapt to meet the needs of the 21st century. The City, County, and Blueprint will encourage businesses to use apprenticeships and externships to reduce worker turnover by fostering greater employee loyalty, increasing productivity, and improving the bottom line. Apprenticeships and externships offer workers a way to start new careers with good wages.

The success of this program requires collaboration among partners – businesses, workforce development intermediaries (such as industry associations or labor organizations), educational institutions, the public workforce system, and other key community organizations. The collaboration requires partners to work together to identify the resources needed, design a program, and recruit apprentices and externs.

A. The Role of Partners

Business Partners – construction and construction-related firms:

1. Identify the skills and knowledge that apprentices and externs must learn
2. Hire new workers, or select current employees, to be apprentices or externs
3. Provide on-the-job training

4. Identify an experienced mentor to work with apprentices and/or externs
5. Pay progressively higher wages as skills increase
6. Can provide related instruction in-house or in partnership with others

Workforce Development Intermediaries - industry association, labor and joint labor-management organization, community-based organization https://nabtu.org/apprenticeship-and-training/:

1. Provide industry and/or workforce specific expertise (e.g. curriculum development) to support employers in a particular industry sector
2. Can serve as sponsor of an apprenticeship or externship program, taking responsibility for the administration of the program, thereby reducing the burden on employers
3. Aggregate demand for apprentices, particularly with small- and medium-size employers, that may not have the capacity to develop an apprenticeship program on their own
4. Can be the provider of related instruction and supportive services as appropriate

Educational Institutions - 4-year college, community college, career and technical education, such as Lively Technical College and Tallahassee Community College:

1. Develop curriculum for related instruction.
2. Can serve as sponsor of an apprenticeship or externship program, taking responsibility for the administration of the program, thereby reducing the burden on employers
3. Deliver related instruction to apprentices and externs
4. Can provide college credit for courses successfully completed
5. Aggregate demand for apprentices and externs

State Apprenticeship Agency – Florida Department of Education https://www.doleta.gov/OA/occupations.cfm:

1. Provide technical assistance and support to new sponsors
2. Answer questions about the apprenticeship model
3. Guide the partners through the steps to develop and register a program
4. Connect businesses with training providers
5. Advise partners on sources of funding to support apprenticeships

B. Core Components

Business Involvement.

Employers are the foundation of every apprenticeship or externship program and the skills needed by their workforce are at the core. Businesses must play an active role in building the program and be involved in every step in designing the apprenticeship or externship.

On-the-Job Training.

Every program includes structured on-the-job training. Apprentices and externs receive hands-on training from an experienced mentor at the job site for typically not less than one year. On-the-job training is developed through mapping the skills and knowledge that the apprentice or extern must learn over the course of the program in order to be fully proficient at the job.

C. Apprenticeship or Externship Requirements and Exceptions

When responding to a solicitation for a construction, design-build, or similar project, in order to receive 2 points as described in the Policy, respondent must certify that:

1. The respondent or its subcontractors or subconsultants participate or will participate in an apprenticeship program that is registered with the Florida Department of Education or the United States Department of Labor; or
2. Respondent or its subcontractors or subconsultants participate or will participate in an externship program offered by an educational institution or workforce development intermediary; or
3. The respondent avers that at the time the respondent executes a construction contract, respondent or its subcontractors or subconsultants will be participating in an apprenticeship program that is approved by the Florida Department of Education or the United States Department of Labor.

This program will not apply to a subcontractor or subconsultant that is an SBE firm if the compensation to be paid under the applicable subcontract for labor costs is less than $1,000,000.

D. Required Documentation, Noncompliance, and Reporting

1. *Required documentation*. The prime contractor or consultant must prepare and submit, on a quarterly basis for the duration of the construction contract, accurate and timely records identifying the name, address, trade classification, whether the worker is an apprentice or extern, the labor hours of all workers used by the prime and each subcontractor or subconsultant on the construction project, and the cumulative number of hours worked on the project to date by apprentices. If the apprentice or extern is participating in an apprenticeship or externship program offered by qualified workforce development intermediary or educational institution, quarterly documentation must include documentation required by the workforce development intermediary or educational institution. The prime contractor or consultant must require that each of its subcontractors or subconsultants prepare and maintain, for submittal by the prime contractor or consultant to the City, County, or Blueprint, accurate and timely records identifying the name, address, trade classification, and labor hours for apprentices and externs used by the subcontractors or subconsultants on the construction project.
2. *Noncompliance*. Failure of a prime contractor or consultant to comply with the requirements of this policy may subject the contractor to all remedies available to the City, County, or Blueprint at law, including but not limited to debarment or suspension of the contractor from consideration for the award of future contracts.
3. *Reporting*. With the help of City, County, and Blueprint staff, OEV will annually prepare a report that includes the total dollar value of awards of construction projects, the number of apprentices hired for the construction projects, the number of apprentices or externs working on construction projects, the number of hours worked by apprentices on the construction projects, and the total labor hours expended on the construction projects.

XI. COUNTING SBE UTILIZATION

The following guidelines clarify how to count SBE utilization.

A. Counting SBE Utilization Generally (Construction, Architecture & Engineering, Professional Services, and Other Services)

1. When an SBE firm participates in a contract, the City, County, and Blueprint will count only the value of the work actually performed by the SBE firm.
2. When an SBE firm is the prime contractor or consultant, the goal is fulfilled provided the SBE firm is performing a commercially useful function ("CUF").
3. OEV will count the entire portion of a contract that is performed by an SBE firm itself. OEV will include the cost of supplies and materials obtained by the SBE firm for the work of the contract, including supplies purchased or equipment leased by the SBE firm (except supplies and equipment the SBE firm purchases or leases from a prime contractor or its affiliate).
4. OEV will count the entire amount of fees or commissions that an SBE firm charges for providing a bona fide service, such as professional, technical, consultant, or managerial services, or for providing bonds or insurance specifically required for the performance of a contract, provided OEV determines that the fee is reasonable and not excessive as compared with fees customarily allowed for similar services.
5. OEV will count payments to an SBE firm only if the SBE is performing a CUF on that contract.
6. OEV may presume that the SBE prime contractor is not performing a CUF if the firm is not performing 30 percent of the total cost of the contract with their own forces to meet an applicable SBE goal.
7. If an SBE firm does not perform or exercise responsibility for at least 51 percent of the total cost of its subcontract with its own work force, or the SBE subcontracts a greater portion of the work of a contract than would be expected on the basis of normal industry practice for the type of work involved OEV may presume that the firm is not performing a CUF.
8. OEV's presumption of non-compliance with the CUF requirement may be overcome by OEV's review of the following: (a) whether the firm is responsible for the execution of a distinct element of work or services; (b) carries out its obligation by actually performing, managing, or supervising the work involved; (c) performs work that is normal for its business, services and function; and (d) is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.
9. SBE firms are discouraged from subcontracting all or a majority of their work to another firm or firms. OEV will not count the work of an SBE firm whose sole intent is collection of a broker's fee or commission and whose employees perform none of the direct labor or service activities specified in the contract.
10. OEV will not count any work that an SBE firm subcontracts back to:
    a. The prime contractor or consultant, either directly or through any other company or firm owned and/or controlled by the prime contractor, or;
    b. Any firm with which the SBE firm has a present business.
11. In the event that a first tier SBE firm acting as a subcontractor or subconsultant (in a direct contractual relationship with a prime) contract work to a second tier subcontractor or subconsultant (sub-sub), OEV will only count the work if the first tier subcontractor or

subconsultant must perform a CUF with 51 percent of its own workforce.

12. When an SBE firm subcontracts part of the work of its contract to another firm, the value of the subcontracted work may be counted toward SBE project specific or aspirational goals only if the subcontractor is itself an SBE firm.
13. When an SBE firm performs as a participant in a Joint Venture, Partnership, or Association, OEV will count a portion of the total dollar value of the contract equal to the distinct, clearly defined portion of the work of the contract that the MBE or WBE firm performs with its own forces.
14. In calculating overall utilization, OEV will not count the participation of an SBE firm until the SBE firm has been actually paid for the work.

B. Counting Materials & Supplies

1. If the materials or supplies are directly obtained from a SBE manufacturer, OEV will count 100 percent of the cost of the materials or supplies. For purposes of this paragraph, a manufacturer is a firm that operates or maintains a factory or establishment that produces, on the premises, the materials, supplies, articles, or equipment required under the contract and of the general character described by the specifications. If the materials or supplies are purchased from an SBE regular dealer, OEV will count 60 percent of the cost of the materials or supplies. However, this amount cannot be used to satisfy more than 60 percent of any applicable SBE goal.
2. Packagers, brokers, manufacturers' representatives, or other persons who arrange or expedite transactions are not regular dealers within the meaning of this policy.
3. With respect to materials or supplies purchased from an SBE firm which is neither a manufacturer nor a regular dealer, OEV will count the entire amount of fees or commissions charged for assistance in the procurement of the materials and supplies or fees or transportation charges for the delivery of materials or supplies required on a job site, provided OEV determines that the fees are reasonable and not excessive as compared with fees customarily allowed for similar services. OEV will not count any portion of the cost of the materials and supplies themselves.

C. Counting Trucking/Transport

1. The SBE firm must be responsible for the management and supervision of the entire trucking operation for which it is responsible on a particular contract, and there cannot be a contrived arrangement.
2. The SBE firm must itself own and operate at least one fully licensed, insured, and operational truck used on the contract.
3. The SBE firm receives credit for the total value of the transportation services it provides on the contract using trucks it owns, insures, and operates using drivers it employs.
4. The SBE firm may lease trucks from another SBE firm, including an owner-operator who is SBE certified. The SBE firm who leases trucks from another SBE firm receives credit for the total value of the transportation services the lessee SBE firm provides on the contract.
5. The SBE firm may also lease trucks from a non-SBE firm, including from an owner-operator. The SBE firm who leases trucks from a non-SBE firm is entitled to credit for the total value of transportation services provided by non-SBE lessees not to exceed the value of transportation services provided by SBE-owned trucks on the contract. Additional participation by non-SBE lessees receives credit only for the fee or commission it receives as a result of the lease arrangement.
6. A lease must indicate that the SBE firm has exclusive use of and control over the truck. This does

not preclude the leased truck from working for others during the term of the lease with the consent of the SBE firm, so long as the lease gives the SBE firm absolute priority for use of the leased truck. Leased trucks must display the name and identification number of the SBE firm.

D. Counting Joint Venture, Partnership, and Association

1. Joint Venture, Partnership, and Association respondents will demonstrate that at least one partner to the Joint Venture Partnership, and Association is an SBE firm, as applicable to the project specific goal, and that such partner is responsible for a clearly defined portion of the work to be performed, will be performing a commercially useful function under the contract, and shares in the ownership, control, management, responsibilities, risks, and profits of the Joint Venture, Partnership, and Association.
2. This demonstration must be verified by pertinent documents and sworn statements. OEV may review the demonstration at the time a response to a solicitation is submitted or before the contract award.
3. For the purpose of tentatively awarding credit towards a respondent meeting project specific goals, OEV may consider a proposed partnership, that is not yet legally formed, and which appears in all matters except legal formation as a Joint Venture. However, such partnership will become a legal organization before the Joint Venture enters a contract with the City, County, or Blueprint. Partnerships or Associations need not form a separate legal entity to receive credit.
4. OEV may award credit towards a respondent meeting project specific goals calculated as the portion of the total dollar amount of a proposed contract equal to the percentage of the ownership and control held by the qualifying SBE firm as applicable to the project specific goals in the solicitation.

E. Counting Mentor-Protégé

1. Respondents in a Mentor-Protégé relationship will demonstrate that the Protégé is an SBE firm, as applicable to the project specific goal, and that the Protégé is responsible for a clearly defined portion of the work to be performed in terms of a percentage of the contract value, will be performing a commercially useful function under the contract, and is receiving training and education in the respondent's industry standards through the Mentor-Protégé relationship.
2. This demonstration must be verified by submission of an SBE Participation Plan and sworn statements. OEV may review the demonstration at the time a response to a solicitation is submitted or before the contract award.
3. OEV may award credit towards a respondent meeting project specific goals calculated as the portion of the total dollar amount of a proposed contract equal to the clearly defined portion of the work to be performed.

XII. REPORTING

The effectiveness of the SBE Program will be measured by a review of data indicating dollars spent with SBE firms as a percentage of the total spending of the City, County, and Blueprint. Program effectiveness will also be measured by efforts of City, County, and Blueprint staff to provide prime contracting opportunities for SBE firms. The following activities will be completed to ensure the effective tracking of these efforts:

A. Prime Contractor and Consultant Responsibility

Each prime contractor or consultant will continuously maintain, compile, and make available to OEV each month during the life of a contract data relating to its use of subcontractors or suppliers, both SBE firms and non-SBE firms, on City, County, Blueprint, and federally funded projects. This information will include without limitation the following information for each of the subcontractors and suppliers utilized by the prime contractor or consultant on the project:

1. A description of the type of work, by applicable code(s), of contracts awarded to subcontractors and/or suppliers;
2. The dollar value of contracts paid to SBE firms;
3. Contact information for the subcontractors, subconsultants, and suppliers; and
4. A description of progress towards fulfilling any project specific SBE goal.

B. Project Closeout

At the close of every project, all prime contractors and consultants will be asked to provide a Final Pay Affidavit documenting all information relating to its use of subcontractors, subconsultants, or suppliers.

C. Purchasing Card Data

The purchasing card vendor will supply expenditure data with both SBE certified firms and non-SBE certified firms. This data will automatically populate into the contract compliance process and electronic tracking system. City and County information technology or procurement employees will develop a method of securing an import file that extracts the data from City and County servers and uploads the data into the contract compliance process and electronic tracking system. Dollars spent with SBE firms will be counted in accordance with this Policy.

D. Annual Report

OEV will prepare an annual report based on the information submitted by each prime contractor or consultant and information from the City Procurement Services Division and County Purchasing Division regarding the use of SBE firms as prime contractors or consultants. The annual report will identify awards of City, County, and Blueprint contracts to SBE firms, prime use of SBE firms, prime progress in achieving project specific goals, and other SBE information.

XIII. SBE FIRM CERTIFICATION

OEV will be responsible for certification of small businesses An eligible SBE firm must meet the criteria below:

A. Certification Process Procedures

This certification process will include but is not limited to:

a. Documentation of property and business income.
b. Documentation of appropriate professional certification and/or registrations.
c. City/County business licenses/business tax certificate, if applicable.
d. Bank/credit references for the company or firm.
e. Last two years federal income and state sales tax returns and/or current Financial Stateme nt.
f. Copy of incorporation articles/list of officers.
g. Inventory of major equipment, if applicable
h. Presence on State of Florida or other SBE lists, if applicable.

B. Certification Criteria

For Certification as an SBE firm, the applicant must meet all of the criteria indicated in **Table 5** below:

TABLE 5
SBE CERTIFICATION ELIGIBILITY CRITERIA

SBE Certification Eligibility Criteria	
1.	Business must be legally structured either as a corporation, organized under the laws of Florida, or a partnership, sole proprietorship, limited liability, or any other business or professional entity as required by Florida law.
2.	Business must be a for-profit business concern.
3.	Business must be currently domiciled or headquartered within the four-county Market Area of Leon, Gadsden, Jefferson, or Wakulla Counties.
4.	The Business must have all licenses required by local, state, and federal law.
5.	The Business must currently be licensed and engaging in commercial transactions typical of the field, with customers in the Local Market Area other than state or government agencies, for each specialty area in which Certification is sought. Further, if a Supplier, business must be making sales regularly from goods maintained in stock.
6.	The Business must have expertise normally required by the industry for the field for which Certification is requested.
7.	The Business must have a business net worth no more than $5 million.
8.	The Business must employ 200 or fewer full- or part-time employees, including leased employees.
9.	The Business must have been established for a period of one (1) calendar year prior to submitting its application for SBE certification.
10.	The Business must have a record of satisfactory performance on no less than three (3) projects, in the business area for which it seeks certification, during the past 12 calendar months.

11.	The business owner must be a permanent resident inthe four-county market area of Leon, Gadsden, Jefferson or Wakulla Counties as its permanent residence.
12.	A minimum of fifty-one percent (51%) of the business must be owned by a permanent resident of the four-county market area of Leon, Gadsden, Jefferson, or Wakulla Counties.

C. Reciprocity

Upon written request and submission of required documentation, OEV will grant reciprocal SBE certification to qualifying applicant firms. OEV will grant reciprocal SBE certification to applicant firms domiciled in the Market Area that hold current SBE certification with the Florida Department of Management Services Office of Supplier Development (OSD), and the Leon County School District. OEV will grant reciprocal SBE certification to applicant firms domiciled in the Market Area that hold current Veteran-owned (VBE) certification with OSD. The term of reciprocal SBE certification will follow the term of the applicant firm's certification with OSD.

The applicant firm will provide OEV with documentation authenticating its OSD certification and expiration dates. OEV reserves the right to request any additional documentation to verify or clarify the authenticity of the information provided to include tax records and proof of residency

An applicant firm that is currently under suspension or debarment by any governmental entity or that has been denied certification by OEV in the six (6) months preceding its request for reciprocal certification may not use this reciprocity policy to circumvent the imposed sanctions or actions of the governmental entity.

D. Certification Review

Within forty-five (45) days of the completed application affidavit and required supporting documentation, OEV staff will notify the applicant of approval or denial of certification. Certified SBEs will be listed in the Online SBE Directory.

E. Recertification

1. OEV will send a Recertification Application link via email from B2GNow to the appropriate SBE firm at least sixty (60) days prior to the certification expiration date. The SBE Recertification Application link will be accompanied by appropriate instructions.
2. When the online Recertification Application is received by OEV, it is reviewed for comparison with the content of the original application. All appropriate changes are noted in the online SBE Directory. SBE Recertification is valid for two years.
3. If there has been a change in ownership interest and/or control, appropriate supporting documentation will be required for continued certification.

A company or firm that fails to submit all appropriate information by the anniversary date of certification will be deemed to have abandoned its application for recertification.

F. Denial of Recertification

If the review by OEV indicates that the previously certified SBE firm no longer meets eligibility standards as defined in these procedures for recertification as a SBE firm the application for recertification will be denied.

OEV will notify the SBE firm by certified mail that the staff review has indicated that the business is no longer eligible for certification, and that the applicant will have the right to appeal such recertification denial in accordance with **Section XIV.H** below.

G. Decertification

OEV reserves the right to revoke the certification of a business at any time such action is deemed necessary. Grounds for revocation of certification will include but are not limited to the following:

1. Submission of fraudulent information as part of the certification process.
2. Failure to promptly report any change in ownership or control of the firm.
3. Failure to promptly report any name, address or phone number changes of the firm.
4. Failure to respond to request for information from OEV.
5. Fraudulent representation or participation on City or County projects or contracts.
6. Submittal of fraudulent information or documentation to OEV as may be requested or as part of the normal procurement process.
7. Revocation of certification by the State of Florida, Department of Management Services, or the State of Florida Department of Transportation.

H. Certification Denial Right of Appeal

1. Any business denied certification, recertification, or decertified by OEV will have the right to appeal such denial. Notice of appeal will be filed in writing to OEV within seven (7) business days of receipt of the notice of denial from OEV.
2. The Notice of Appeal will indicate the reason(s) and provide additional information, if appropriate, as to why the business believes the denial was in error.
3. OEV will provide a written response acknowledging receipt of the correspondence to the business within seven (7) business days upon receipt of the formal appeal.
4. Failure to file with OEV within the prescribed time frame will constitute a waiver of proceedings under this section. OEV will schedule a review within thirty (30) calendar days of receipt of request for appeal and issue a final written decision. This review by OEV is the final step available in the administrative process for an appeal of denial of original certification, recertification, or decertification.
5. A firm whose application has been denied may re-apply six months after final denial notice.

I. Review

This Policy is subject to the review and approval of the Board of Directors of the Blueprint Intergovernmental Agency, the Leon County Board of County Commissioners, and the City of Tallahassee Commission.

XIV. SBE FIRM GRADUATION

A. Certified SBE firms will graduate from SBE certification when the firm's net worth exceeds $5 million or they exceed 200 employees.

B. Any interested party may request an evaluation of an SBE firm. OEV will evaluate the firm at the time of its recertification. If OEV determines that the firm has exceeded the size standards described above, the following provisions will apply:
   1. Notification. OEV will issue a letter of notification to the firm notifying the firm of its graduation. The letter of notification will set forth findings for every material issue relating to the basis of the program graduation with specific reasons for each finding based on facts and in accordance with law, regulations, and this policy.
   2. Appeal. The firm will be allowed 45 days from the date of the letter to appeal the decision. To appeal the decision, the company or firm must submit in writing to OEV information explaining why graduation is not warranted. Upon receipt of the appeal, OEV will notify the firm in writing of the receipt of the appeal.
   3. Review. If the firm appeals its graduation within the requisite 45 days, the Director of PLACE will review the appeal. The Director of PLACE will issue a written decision within 15 days of receipt of the appeal via USPS or certified mail.
   4. After the effective date of a firm's graduation as provided for herein, a firm is no longer a certified SBE firm. However, the firm remains obligated to complete previously awarded contracts and/or subcontracts, including any priced bids that may be exercised.

XV. CAPACITY BUILDING COMPONENT

To ensure that opportunities to participate are available to the maximum number of interested, available, and qualified businesses, OEV will develop and implement a comprehensive capacity building component (CBC) that includes outreach and technical assistance. The CBC is aimed at increasing business participation in the City's, County's, and Blueprint's contracting and procurement process. This program may include, without limitation, any or all of the following:

A. Outreach and information dissemination;
B. Technical assistance program to prepare SBE firms to compete for specific contracts;
C. Implement and monitor a supportive services program to develop and improve immediate and long-term business management, record keeping and financial and accounting capability for businesses;
D. Develop and provide services to help businesses improve their long-term development, increase their opportunities to participate in a variety of kinds of work, handle increasingly significant projects, and achieve self-sufficiency;
E. Establish a program to assist new, start-up or emerging businesses; and assist businesses in developing their capability to utilize emerging technology and conduct business through electronic media.
F. Establish a method of evaluating SBE firms and prime contractors and consultants in coordination with the City Procurement Services Division, County Purchasing Division and City, County, and Blueprint project managers to provide feedback on performance and evaluate firm capacity.

XVI. FORMS AND CORRECTIONS

OEV shall work with the City Procurement Services Division and County Purchasing Division to develop, publish, and amend as may be required, all forms necessary to implement this Policy; and make necessary non-material corrections to the Policy, including scrivener's errors, without further IA Board, City, or

County Commission approval.

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MINORITY, WOMEN, AND SMALL BUSINESS ENTERPRISE POLICY

OFFICE OF ECONOMIC VITALITY

OFFICE OF ECONOMIC VITALITY
MINORITY, WOMEN, AND SMALL BUSINESS ENTERPRISE POLICY

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I. AUTHORITY

This policy supersedes City of Tallahassee MWSBE Policies 16.5, adopted January 22, 2014, and Leon County Purchasing Policy No. 96-1 Part B, adopted June 20, 2017. The City of Tallahassee, FL (City) adopted this policy on (date). Leon County Government (County) adopted this policy on (date). The Blueprint Intergovernmental Agency (Blueprint) Board of Directors (IA Board) adopted this policy on January 30, 2020. This consolidated policy will be administered by the Minority, Women, and Small Business Enterprise (MWSBE) Division of the Office of Economic Vitality (OEV). Following approval of all three entities, this policy will become effective on April 1, 2020.

II. SCOPE AND APPLICABILITY

This policy is applicable to solicitations advertised by any and all City, County, and Blueprint officials and departments.[1] All three entities reserve those rights set forth in their respective purchasing and procurement policies to the extent they are not in conflict with this MWSBE Policy.

III. POLICY STATEMENT

Pursuant to City of Tallahassee Administrative Policies and Procedures Manual Section No. 1204 and Leon County Government Policy No. 18-1, the City, County, and Blueprint will not tolerate any form of discrimination in any of their programs, services, or activities.

The Small Business Enterprise (SBE) Program is race- and gender-neutral and intended to promote City, County, and Blueprint utilization of SBE firms. The Minority Women Business Enterprise (MWBE) Program outlined in this policy is narrowly tailored to remedy discrimination documented in the 2019 Disparity Study conducted by MGT of America, Inc., and accepted by the IA Board at its meeting held June 27, 2019. The 2019 Disparity Study identified disparity in City, County, and Blueprint spending sufficient to support a race- and gender-conscious MWBE program for all three entities.

The City, County, and Blueprint intend to institute and maintain an MWBE Program and an SBE Program that provide for:

A. Representative utilization of MWSBE firms in all aspects of City, County, and Blueprint procurement activity.

B. Elimination of any institutional and procedural barriers which would prohibit active participation in City, County, and Blueprint procurement opportunities.

[1] Although the City of Tallahassee Procurement Services Division administers solicitations for the Consolidated Dispatch Agency (CDA) and Capital Region Transportation Planning Agency (CRTPA), this policy does not apply to the solicitations of the CDA and does not apply to the solicitations of the CRTPA.

C. Training, education and technical assistance to enhance opportunities for MWSBE firm participation in the City, County, and Blueprint purchasing and contracting activities.

D. Public information on the opportunities available for doing business with the City, County, and Blueprint.

IV. OBJECTIVES

A. To provide minority, women, and small businesses in the Market Area equal access and opportunities to compete and be awarded contracts and purchases.

B. To remedy any disparate treatment of minority, women, and small businesses attempting to do business with the City, County, and/or Blueprint.

C. To effectively communicate procurement and contracting opportunities, business and professional development resources for minority, women, and small businesses.

V. BACKGROUND

In 2016, the City and County merged their respective supplier diversity offices into the Office of Economic Vitality (OEV) Minority, Women, and Small Business Enterprise (MWSBE) Division. OEV commissioned the Disparity Study in 2017 to determine whether evidence of disparity existed in the market, and if so, whether that disparity was sufficient to support an MWSBE Program that serves the City, County, and Blueprint.

In 2019 the Disparity Study revealed evidence of disparity sufficient to support the continuation of a race- and gender-conscious MWBE Program, as well as a single, consolidated MWBE Program and aspirational goals that serve all three entities. The IA Board accepted the 2019 Disparity Study at its June 27, 2019 meeting and directed staff to develop this policy with the support of City, County, and Blueprint staff and officials as well as external stakeholders in the contracting community.

VI. DEFINITIONS

The terms and words used in this policy are defined below.

1. "Affiliate" or "Affiliation" – When the owner of a firm either directly or indirectly controls or has the power to control another firm; a third party or parties controls or has the power to control both; or other relationships between or among parties exist such that affiliation may be found between the two firms. A firm is an affiliate of another when the owner of the firm has possession, direct or indirect of either: (i) the ownership of or ability to direct the voting of, as the case may be, more than fifty percent (50%) of the equity interest, value, or voting power of such firm, or (ii) the power to direct or cause the direction of the management and policies of such firm whether through the ownership of voting securities by contract or otherwise. In determining whether a firm is an affiliate with another firm or with an owner of another firm, consideration

will be given to all appropriate factors including but not limited to common ownership, common management, contractual relationship, and shared facilities.

2. “Applicant” – a person who has submitted an application for certification as an MBE, WBE, or SBE to the MWSBE Division of the Office of Economic Vitality.

3. “Apprentice” – Any person who is enrolled in and participating in an apprenticeship program registered with the Florida Department of Education or the United States Department of Labor. If a registered apprenticeship program does not exist for the type of work on the construction project, then apprentice means any person who is participating in a company-sponsored training program for that type of work.

4. “Apprenticeship or externship relationship” – The relationship between a prime or subconsultant or subcontractor and apprentices or externs participating in a qualifying apprenticeship or externship program.

5. “Award” – The final selection of a respondent for offer of a specified prime contract or subcontract dollar amount. Awards are made by the City, County, and Blueprint to prime contractors or consultants or by prime contractors or consultants to subcontractors or subconsultants, usually pursuant to solicitations.

6. “Broker” **–** A person or firm engaged as a subcontractor or subconsultant whose sole involvement in a contract is for the purpose of collecting a broker's commission or fee, and with the intent of not performing any of the direct labor activities or services by his or her employees, and who subcontracts his or her portion of the work to another firm or firms.

7. ”Business days” – Monday through Friday, 8:00am to 5:00pm EST (not including City, County, or Blueprint observed holidays).

8. Business Categories for which the City, County, and Blueprint have established MWBE Aspirational Goals include the following and have the following meaning:

   a) “Architecture & Engineering” – Architectural or engineering services provided by an appropriately licensed professional architect or engineer or by a professional architectural or engineering firm related to architectural or engineering services.

      i. “Architecture” - When provided by an appropriately licensed architect or architectural firm that employs appropriately licensed architects, "architecture" will mean the rendering or offering to render services in connection with the design and construction of a structure or group of structures which have as their principal purpose human habitation or use, and the utilization of space within and surrounding such structures. These services include planning, providing preliminary study designs, drawings and specifications, job-site inspection, and administration of construction contracts.

      ii. "Engineering" – Will include the term “professional engineering” and, when provided by an appropriately licensed professional engineer, licensed engineer, or an engineering firm that employs appropriately licensed professional or licensed engineers, “engineering” will mean any service or creative work, the adequate performance of which requires engineering education, training, and experience in the application of special knowledge of the mathematical, physical, and engineering sciences to such services or creative work as consultation, investigation, evaluation, planning, and design of engineering works and systems, planning the use of land and water, teaching of the principles and methods of engineering design, engineering surveys, and the inspection of construction for the purpose of determining in general if the work is proceeding in compliance with drawings and specifications, any of which embraces such services or work, either public or private, in connection with any utilities, structures, buildings, machines, equipment, processes, work systems, projects, and industrial or consumer products or equipment of a mechanical, electrical, hydraulic, pneumatic, or thermal nature, insofar as they involve safeguarding life, health, or property; and includes such other professional services as may be necessary to the planning, progress, and completion of any engineering services.

b) "Construction" – Services that include the building, attaining, repairing, improving, or demolishing any public structure or building, or other public improvement of any kind to any public real property. "Construction" does not include routine operation, routine repair, or routine maintenance of existing buildings or facilities.

c) "Professional Services" – Any service provided by a person or firm that is of a professional nature, with special licensing, educational degrees, and unusual or highly specialized expertise. Examples include, but are not limited to Financial Services, Legal Services, Medical Services, and Advertising/Marketing Services. "Professional Services" do not include "Architecture & Engineering," which is separately defined herein.

d) "Other Services" – Any service that is labor intensive and not considered professional or construction services as defined above. Examples include, but are not limited to maintenance services, janitorial services, lawn services, employment services, and printing services.

e) "Materials and Supplies/Purchases" – Equipment and consumable items purchased in bulk or deliverable products. Examples of such include, but are not limited to equipment and parts, chemicals, and paper products.

9. "Calendar Days" – All days of the week.

10. "Certification" – Verification that a business meets all eligibility criteria for participation in the MWSBE Program as an SBE and/or an MBE or WBE.

11. "Certification Application" – Forms and documents an applicant must complete to be considered for Certification.

12. "Certified Minority Business Enterprise" – A for-profit business which has been certified to be a minority-owned business enterprise by the MWSBE Division of the Office of Economic Vitality.

13. "Certified Women Business Enterprise" – A for-profit business which has been certified to be a woman-owned business enterprise by the MWSBE Division of the Office of Economic Vitality as defined in this policy (not included in a minority group).

14. "Change Order" – Modification to the work scope, cost, or schedule phasing of a capital project contract, as authorized by the appropriate City, County or Blueprint authority. Also, for purposes

of this policy, Change Order will include budget transfers and supplemental appropriations.

15. "Commercially Useful Function" (CUF) - A business performs a "Commercially Useful Function" when the business: (a) is responsible for the execution of a distinct element of work or services; (b) carries out its obligation by actually performing, managing, or supervising the work involved; (c) performs work that is normal for its business, services and function; and (d) is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices. A prime contractor or consultant, subcontractor or subconsultant, or supplier will not be considered to perform a Commercially Useful Function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of MWBE participation.

16. "Consultant" - Any person, firm, or legal entity that provides professional services governed by the Florida Consultants Competitive Negotiation Act and that has entered into a contract with the City, County, or Blueprint, or any of their contracting agencies.

17. "Contract" - Any agreement, regardless of what it may be called, between the City or County and a person, firm or legal entity to provide or procure labor, materials, supplies, or services to, for, or on the behalf of the City or County.

18. "Contractor" - Any person, firm, or legal entity, except those governed by the Consultants Competitive Negotiation Act, that has entered into a contract with the City, County, or Blueprint, or any of their contracting agencies.

19. "Control" – An applicant firm owner exercises control over the firm's operations, work, management, and policy. Indication of control may include the following:

    a) Applicant firm owner(s) must demonstrate the ability to make unilateral and independent business decisions as needed to guide the future and destiny of the business, and their business must not be subject to any formal or informal restrictions that limit the customary discretion of such owner(s). There can be no restrictions through corporate provisions, by-law provisions, contracts or any other formal or informal devices that prevent the owner(s) from making any business decision of the firm without the cooperation or vote of another entity or person that is not an owner(s) or who would not be eligible for the MWBE Program.

    b) Applicant firm owner(s) must control the day-to-day operations of the business in critical area(s). Administrative responsibilities alone are not sufficient to prove control. The owner(s) may delegate various areas of the management or daily operations of the business to other persons, who would not be eligible for the MWBE Program or who are not owners, only if such delegation is typical in the industry for such business and such delegation is revocable.

    c) Applicant firm owner(s) must have an overall understanding of, and managerial and technical competence, experience, and expertise directly related to the firm's operations and work.

20. "Director of PLACE" – The Director of the Department of Planning, Land Management, and Community Enhancement (PLACE).

21. "Front" – A business that intentionally and/or falsely holds itself out as a business that is controlled or owned at least 51% by a minority or minorities, or by a woman or women, when in

fact it is not.

22. "Good faith effort" – Effort made in good faith by a respondent to meet project specific MWBE goals. Respondents may demonstrate good faith effort by meeting the project specific goals, or by demonstrating it has made reasonable effort to do so by submitting documentation of good faith effort.

23. "Graduation" – A firm's ineligibility to be certified as an MWSBE firm with the MWSBE Division of the Office of Economic Vitality because the firm has exceeded the size standards set forth in this policy.

24. "Independent" – A firm whose viability does not depend on its relationship with another firm is independent. Recognition of an applicant firm as a separate entity for tax or corporate purposes is not necessarily sufficient to demonstrate that a firm is independent. Indicators that a firm is independent include: (i) relationships with other businesses in such areas as personnel, facilities, equipment, financial and/or bonding support, and other resources; (ii) whether present or recent family, or employer/employee relationships compromise the applicant owner(s)' independence; and (iii) whether the applicant owner(s)' exclusive or primary dealings with a prime contractor compromises the applicant owner(s)' independence.

25. "Joint Venture" – As used in this policy is a short-term business association—a separate legal entity like a corporation or LLC—consisting of certified MWBE firm(s) and non-MWBE firm(s) or certified MWBE firms formed to carry on a single business activity which is limited in scope and duration, which the parties jointly undertake for a transaction, for which they combine their property, capital, efforts, skills, and knowledge. Generally, each party will contribute assets and share risks. Joint ventures can involve any type of business transaction and the parties involved can be individuals, groups of individuals, companies, or corporations.

26. "Market Area" – The geographical area consisting of the following Florida counties: Leon, Gadsden, Jefferson, and Wakulla.

27. "Majority Ownership" or "Majority Owner" – Owning no less than 51% of a business enterprise.

28. "Manufacturer" – Will mean a person or firm engaged in the process of making, fabricating, constructing, forming or assembling a product(s) from raw, unfinished, semi-finished, or finished materials through a direct contract/agreement on behalf of the general contractor.

29. "Mentor-Protégé relationship" - A Mentor-Protégé relationship exists when an experienced company, firm, or individual (Mentor) provides assistance and training to an MWBE firm (Protégé).

30. "Minority Business Enterprise" (MBE) – A firm whose MBE Certification is recognized, current, and accepted by the MWSBE Division of the Office of Economic Vitality.

31. "Minority or Women Business Enterprise" (MWBE) – Refers jointly to MBE and WBE firms or the policies and procedures related thereto.

32. "Minority Person" or "Minority" - An individual who is a citizen of the United States, or a lawfully admitted permanent resident, and who identifies himself or herself as being African, Hispanic,

Asian, or Native American.

a) "African American" – All persons having origins in any of the Black racial groups of Africa.

b) "Hispanic American" – All persons having origins from a Hispanic country regardless of race.

c) "Asian American" – All persons having origins in the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands.

d) "Native American" - Persons who are enrolled members of a federally or State recognized Indian tribe, Alaska Natives, or Native Hawaiians.

33. "Minority, Women, or Small Business Enterprise" (MWSBE) – Refers collectively to MBE, WBE, and SBE firms or the policies and procedures related thereto.

34. "MWSBE Director" – The Director of the MWSBE Division of the Office of Economic Vitality.

35. "MWSBE Program" – The programs and efforts under the provisions of this policy, either directly or through partners, to enhance participation in City, County, and Blueprint contracts to achieve parity between spending with MBE, WBE, and SBE firms and their existence in the local market.

36. "NAICS (North American Industry Classification System)" – The standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

37. "Office of Economic Vitality (OEV) Director" - The Director of the Office of Economic Vitality.

38. "Owner" or "Ownership" – The person(s) who own(s) a business.

39. "Participation Plan" – The portion of a response to a solicitation provided by a respondent giving detailed information regarding respondent's plan to meet the project specific goals contained in the solicitation, intention to comply with this policy, and intention to utilize certified MBE and WBE firms to meet the project specific goals.

40. "Partnership or Association" - A short-term business association—a partnership or association—consisting of certified MWBE firm(s) and non-MWBE firm(s) or certified MWBE firms formed to carry on a single business activity which is limited in scope and duration, which the parties jointly undertake for a transaction, for which they combine their property, capital, efforts, skills, and knowledge. Generally, each party will contribute assets and share risks. Partnerships or Associations can involve any type of business transaction and the parties involved can be individuals, groups of individuals, companies, or corporations. For the purposes of this policy, Partnerships and Associations are held to all the same standards as Joint Ventures with the exception of the requirement that the businesses form a separate legal entity.

41. "Pre-Bid Meetings" or "Pre-Proposal Meetings" – A meeting held for respondents to gather information about a solicitation prior to the respondent due date.

42. "Prime" – A person or firm who is qualified and responsible for the entire project, who may have one or more subcontractors or subconsultants, and with whom the City, County, or Blueprint has

a direct contractual relationship. A prime contractor provides goods or performs a service not governed by section 287.055, Florida Statutes. A prime consultant performs professional architectural, engineering, landscape architectural, or surveying and mapping services governed by section 287.055, Florida Statutes.

43. “Principal Place of Business” – A location wherein a firm maintains a physical office and through which it obtains no less than fifty percent (50%) of its overall customers or sales dollars.

44. “Present Business Relationship” – A shared space, equipment, financing, employees, or both firms having some of the same owners.

45. “Project specific goals” – The percentage of MBE and WBE participation for a particular procurement opportunity.

46. “Purchasing” or “Procurement” - Buying, renting, leasing or otherwise obtaining or acquiring any goods, supplies, materials, equipment, or services.

47. “Regular Dealer” – A firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials, supplies, articles or equipment of the general character described by the specifications and required under the contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. To be a regular dealer, the firm must be an established, regular business that engages, as its principal business and under its own name, in the purchase and sale or lease of the products in question.

    (a) A person may be a regular dealer in such bulk items as petroleum products, steel, cement, gravel, stone, or asphalt without owning, operating, or maintaining a place of business as provided in this paragraph if the person both owns and operates distribution equipment for the products. Any supplementing of regular dealers' own distribution equipment will be by a long-term lease agreement and not on an ad hoc or contract-by-contract basis.

    (b) Packagers, brokers, manufacturers' representatives, or other persons who arrange or expedite transactions are not regular dealers within the meaning of this paragraph.

48. “Reserved” – A contracting practice restricting eligibility for the competitive award of a contract solely to SBE firms.

49. “Respondent” – The person or party that responds to a solicitation.

50. “Response” – A bid, proposal, statement of qualifications, or other response to a solicitation.

51. “Small Business Enterprise” (SBE) – A firm whose SBE Certification is recognized, effective, and accepted by the MWSBE Division of the Office of Economic Vitality.

52. “Small Business Enterprise Program” (SBE Program) – Those components of this policy that target increased participation of SBE firms in City, County, and Blueprint procurement, including the coordination with other entities and agencies that assist small businesses through various means such as education and networking.

53. “Solicitation” – Any request for proposals, request for qualifications, invitation for bids, invitation

to bid, or other document issued by the City, County, or Blueprint seeking goods or services.

54. "Solicitation Development Meeting" – An internal staff meeting to create and develop solicitations and discuss potential MWBE goals, SBE reserved or unbundling, or other elements of this policy applicable to the solicitation under development.

55. "Subcontract" - Any agreement, arrangement, or understanding, written or otherwise, between a prime contractor or consultant and any party (in which the parties do not stand in relationship of employer and employee) which assigns some of the obligations of the contract:

    a) For the furnishing of supplies or services or for the use of real personal property; including lease arrangements which, in whole or in part, are utilized in the performance of one or more contracts with the City, County, or Blueprint; or

    b) Under which any portion of the prime's obligation under one or more contracts with the City, County, or Blueprint is performed, undertaken, or assumed.

56. "Supplier" - A business that furnishes needed items to a prime contractor or consultant, and (i) is either involved in the manufacture or distribution of the supplies or materials; or (ii) otherwise warehouses and ships the supplies.

57. "Tallahassee-Leon County MWSBE Citizens Advisory Committee" - Consists of eleven members: four appointed by the County Commission, four appointed by the City Commission, and one nominated appointee each from the Big Bend Minority Chamber of Commerce, Capital City Chamber of Commerce, and the Greater Tallahassee Chamber of Commerce. Members serve two-year terms with vacancies being filled for the remainder of a term; and, reappointments will be limited to three consecutive terms. The Committee will be chaired by a Chairperson nominated and elected by the members of the Committee.

58. "Unbundle" – The act of separating projects or large projects into smaller projects which may be more suitable for MWSBE participation.

59. "Woman" or "Women" - An American woman who has not self-identified, within the definition of this policy, as a Minority Person or Minority.

60. "Women Business Enterprise" (WBE) - A business whose WBE Certification is recognized, effective, and accepted by the MWSBE Division of the Office of Economic Vitality.

VII. ORGANIZATION AND RESPONSIBILITY

A. City of Tallahassee City Commission, Leon County Government, and IA Board

The City of Tallahassee City Commission, Leon County Government, and IA Board are responsible for policy decisions as they relate to the MWBE Program and SBE Program.

B. Intergovernmental Management Committee (IMC) and Director of PLACE

The IMC, consisting of the City Manager and County Administrator, and the Director of PLACE are responsible for:

1. The joint administration of the MWBE and SBE Programs.

2. Promulgation of any amendments to this policy to ensure consistency with any law, regulation, or grant requirement.

C. MWSBE Division of the Office of Economic Vitality

The MWSBE Division is responsible for:

1. The administration and management of the MWBE and SBE Programs on a day-to-day basis.

2. Certification of MBE, WBE, SBE, and DBE firms.

3. Scoring of MBE, WBE components of solicitations.

4. Receiving and evaluating quarterly MWSBE Participation Reports and providing a quarterly and annual report on MWSBE participation.

5. Reviewing forthcoming City, County, and Blueprint solicitations to generate an awareness by MWSBE firms of potential opportunities.

6. Providing technical assistance and training to MWSBE firms to facilitate a better understanding of solicitation and contracting procedures.

7. Maintaining communication with minority and non-minority contractor's associations, the construction industry, financial institutions, community organizations, and businesses in general.

8. Monitoring of City, County, and Blueprint contracts with MWSBE participation and assisting in resolution of contract problems.

9. Creating project specific MWBE goals on a case-by-case basis, taking into account the availability of MWBE firms in each contracting and procurement category.

10. Establishing written procedures to implement the MWBE and SBE Programs, including the

certification of businesses as MBE, WBE, and SBE firms.

11. Assessing the certification applications for the MWBE and SBE Program and coordinating certifications with the City, County, and Blueprint.

12. Maintaining a database of MWSBE firms and providing assistance to City and County departments and Blueprint in identifying MWSBE firms for anticipated procurements.

13. Identifying and working to eliminate barriers that inhibit MWSBE participation in City, County, and Blueprint procurement processes.

14. Establishing realistic MBE and WBE project specific goals.

15. Identifying procurement opportunities for competition among SBEs.

16. Monitoring the utilization of MWSBEs and the progress of the MWSBE Program to ensure that MWSBEs have opportunities to participate in City, County, and Blueprint procurement of goods and services, and report on the progress of the MWSBE Program at least annually.

17. Implementing mechanisms and procedures for monitoring utilization of MWSBEs in accordance with contract requirements.

18. Performing outreach by networking with state and local government, nonprofit, professional, and trade organizations and participating in conventions and seminars sponsored and widely-attended by MBE, WBE, and SBE firm owners.

19. Complying with this policy.

D. City Procurement Services Division and County Purchasing Division

The City Procurement Services Division and County Purchasing Division are responsible for:

1. Obtaining project-specific goals for each solicitation from the MWSBE Division before the solicitation is advertised to the public.

2. Organizing solicitation development meetings and pre-bid or pre-proposal meetings

3. Notifying the MWSBE Division of Change Orders and other contract compliance information that affect MBE, WBE, or SBE firms

4. Maintaining accurate data in the contract compliance process and electronic tracking system.

5. Accepting recommendations to initiate debarment procedures for violations of this policy.

6. Complying with this policy.

E. City and County Departments, Blueprint, and Appointed Officials

City and County departments, Blueprint, and appointed officials are responsible for:

1. Assisting in the promotion of the MWBE and SBE Programs and participating in the MWBE and SBE Programs.

2. Coordinating with OEV to improve the utilization of MWSBE firms within each entity.

3. Utilizing the MWSBE Directory and documenting effort to secure MWSBE participation.

4. Reporting MWSBE utilization for entry into the contract compliance process and electronic tracking system.

5. Complying with this policy.

F. Tallahassee-Leon County MWSBE Citizens Advisory Committee

The Tallahassee-Leon County MWSBE Citizens Advisory Committee is responsible for:

1. Monitoring the progress of the MWSBE Program toward achieving program performance goals established by the City Commission, Board of County Commissioners, and the IA Board.

2. Reviewing and providing MWSBE policy alternatives, as well as providing programmatic recommendations relative to seeking resolution of disputes regarding Certification.

3. Scheduling and implementing meetings which will be noticed and open to the public; recording and maintaining minutes of any such meetings.

VIII. MWBE PROGRAM

To ensure that MBE and WBE firms in the Market Area have equal opportunity to engage in City, County, and Blueprint business, the MWBE Program encourages respondents to engage MBE and WBE firms as subcontractors or subconsultants in responses to City, County, and Blueprint solicitations. Each solicitation that is capable of being broken down into work that may be sublet will be issued with a project specific MWBE goal set by the MWSBE Division. Respondents are required to meet the project specific goal or provide documentation of their good faith effort to engage MWBE firms.

To ensure the narrow tailoring of the MWBE Program, the City, County, and Blueprint are responsible for maintaining accurate records documenting all spending with prime contractors and consultants and subcontractors and subconsultants. Therefore, uploading accurate and complete data in the City, County, and Blueprint contract compliance process and electronic tracking system is a necessary component of the MWBE Program. Accurate and complete data is necessary for the creation of narrowly tailored MWBE Aspirational Goals.

A. MWBE Aspirational Goals

Each project specific goal is based on both current availability of MWBE firms in the Market Area and an aspirational goal intended to remedy past disparate treatment of MWBE firms identified in the 2019 Disparity Study. The MWBE aspirational goals were developed based on a comparison of two groups of percentages. First, the 2019 Disparity Study identified the percentage dollars spent with MWBE firms out of the total spending for the City, County, and Blueprint. Second, the 2019 Disparity Study identified the actual percentage of MWBE firm availability in the Market Area. Disparity exists when the percentage of MWBE spending is less than MWBE firm availability. The MWBE aspirational goals are intended to lift MWBE spending up to the level of MWBE availability in the Market Area.

TABLE 1
2019 DISPARITY STUDY MWBE ASPIRATIONAL GOALS

2019 Disparity Study Aspirational Goals		
Procurement Category	**Aspirational MBE Goal**	**Aspirational WBE Goal**
Construction Prime Contractors	5.00%	4.00%
Construction Subcontractors	14.00%	9.00%
Architecture & Engineering	8.00%	6.00%
Professional Services	5.00%	6.00%
Other Services	6.00%	8.00%
Materials and Supplies	1.00%	6.00%

B. Project Specific Goals

The MWBE Program is intended to ensure utilization of MWBE firms in all aspects of City, County, and Blueprint procurement activity and to award contracts with MWBE participation consistent with the MWBE aspirational goals. In furtherance of that intent, project specific MWBE goals will be established for each solicitation with the goal of achieving overall MWBE participation as outlined in **Table 1**. Only the dollars expended with certified MWBE firms from the local Market Area will be counted towards satisfying the project specific MWBE goals. More details on counting MWBE utilization can be found in

Section XII.

1. City and County Departments and Blueprint will plan their solicitations to provide ample time for the MWSBE Division of OEV to establish project specific goals for inclusion into each solicitation, where feasible, before the City Procurement Services Division and Leon County Purchasing Division advertise the solicitation to the public.

2. City Procurement Services and County Purchasing Divisions will obtain a project specific goal established for each individual solicitation from the MWSBE Division before the solicitations are advertised to the public.

    a. As part of the creation of a solicitation document, City, County, and Blueprint project managers will make an effort to identify components in the solicitation's scope of work or scope of services that may reasonably be performed or supplied by a subcontractor or subconsultant and the percentage of the total contract value that those components represent. City, County, and Blueprint project managers will promptly notify the purchasing agent—the responsible employee of the City Procurement Services or County Purchasing Division—of the percentage identified above and the type of work included in that percentage.

    b. City Procurement Services and County Purchasing Divisions may schedule a solicitation development meeting including the MWSBE Division. Solicitation development meetings may occur in person or via teleconference, video conference, email, or other technology. Following solicitation development meetings, the MWSBE Division will report the project specific goals to the City Procurement Services or County Purchasing Divisions. Project specific goals may be lower than the aspirational goals or may be inappropriate for a particular solicitation as described below.

3. The project specific goals for individual solicitations may be higher or lower than the aspirational goals identified in **Table 1** and should reflect realistic MWBE availability for a particular project. The MWSBE Division will determine project specific goals for each solicitation based on contract compliance and supplier diversity industry standards.

4. Project specific goals are considered the minimum level of MBE or WBE participation expected for a particular procurement. Project specific goals are considered targets set to achieve participation levels commensurate with available businesses, and for which there are opportunities for exemptions based upon good faith effort.

5. Project specific goals will be reasonable and give consideration to both subcontracting opportunities and the availability of MBE firms or WBE firms in the Market Area who are capable of performing the work.

6. Project specific goals may not be appropriate when subcontracting is not reasonable or permitted. Where the MWSBE Division has determined that project specific goals are not appropriate for a solicitation, the MWSBE Director will notify the Procurement Services or Purchasing Director that the MWSBE Division has recommended no project specific goals or project specific goals lower than the aspirational goals.

7. In the event of an emergency purchase under the City Purchasing Manual Section 3.12 or County

Purchasing Policy No. 96-1 Section 5.11, project specific goals may be waived.

8. In cases where it is not reasonable to set project specific goals, the MWSBE Director may encourage MWBE participation through respondent's purchase of goods or services from MWBE firms, consistent with the project specific goals, or provide for any combination thereof.

9. Project specific goals will apply to all respondents, including MBE, WBE, and SBE firms. When an MBE or WBE firm is the prime contractor or consultant, the goal is fulfilled for their certification designation and the other portion of the goal must be fulfilled. For example, if a certified MBE firm responds to a solicitation as a prime contractor, the goal for MBE participation is fulfilled. The MBE prime contractor remains responsible for meeting the goal for WBE participation.

10. To meet project specific goals, all City and County departments and Blueprint will cooperate with the MWSBE Division and make every reasonable effort, consistent with this policy, to utilize MWBE firms when available. The MWSBE Director will coordinate and promote the process by taking active steps to encourage full participation of certified, capable, and competitive MBE and WBE businesses and by keeping staff informed of MWSBE availability.

    a. Each department will be responsible for obtaining MWBE participation at the minimum level identified in **Table 1**. All purchases for goods and services will be made in conformance with the City and County Purchasing Manuals.

    b. The MWSBE Division will annually evaluate relevant expenditure and contracting data to determine the performance and progress of the MWBE Program with the assistance of the City and County Budget Offices, City Procurement Services Division and County Procurement Division, and any other applicable departments.

C. Good Faith Effort Documentation

In those instances where a respondent has failed to meet the MWBE goals in whole or in part at the time of response submittal, there is a rebuttable presumption that MWBE firms were available for the project. The burden of proof then shifts to the respondent to rebut this presumption through documentation of its good faith effort (GFE). In those cases, the respondent—even a respondent that is a certified MWSBE firm or a non-MWSBE firm participating in a Joint Venture, Partnership, and Association; Mentor-Protégé; or Apprenticeship arrangement—must submit documentation of GFE with the response to the solicitation.

Each of the following activities are worth 10 points towards documentation of GFE. A combination of the following activities reaching a minimum of 50 points will demonstrate GFE:

1. Attendance at pre-bid or pre-proposal meeting, if applicable.

2. Copies of written correspondence sent to the MWSBE Division no later than fifteen (15) business days before the solicitation response deadline seeking help in identifying firms available to meet the project specific goals.

3. Copies of advertisements placed by the respondent in the local newspaper and minority publications in the Market Area announcing the project and seeking MBE or WBE

participation.

4. Copies of written correspondence sent to a certified MBE or WBE firms. The correspondence should include:

   a. The specific work the contractor intends to subcontract;

   b. That interest in participation by the MWBE firm on the contract is being solicited; and,

   c. How to obtain information for the review and inspection of contract plans and specifications.

5. Documentation that the respondent selected economically feasible portions of work to be performed by MWBEs, including, where appropriate, breaking down contracts or combining elements of work into economically feasible units. (The ability of the contractor to perform the work with its own work force will not in itself excuse a contractor from making positive efforts to meet contract goals).

6. Documentation that the respondent negotiated in good faith with interested MWBE firms and did not reject any interested MWBE firms without sound business reasons. Price alone does not constitute a sound business reason unless the respondent can demonstrate that no reasonable price can be obtained from an MWBE firm.

7. Documentation that the respondent reviewed all quotations received from MWBE firms, and for those quotations not accepted, an explanation of why the MWBE will not be used during the course of the contract. (Receipt of a lower quotation from a non-MWBE will not in itself excuse a contractor's failure to meet contract goals).

8. Documentation detailing respondent’s effort to contact MBE and WBE firms who provide the services needed for the solicitation and indicating that the respondent provided ample time for potential MWBE firms to respond, including a chart outlining the methods of contact and schedule or time frame in which respondent conducted its good faith effort.

9. Documentation that the respondent offered to provide interested MWBE firms with assistance in reviewing the solicitation plans and specifications at no charge to the MWBE firms.

10. Documentation of follow-up telephone calls with potential MWBE firms encouraging their participation.

Respondents should contact the MWSBE Division immediately for guidance and assistance in any of the following events: (1) the respondent anticipates or has difficulty identifying an MWBE firm to meet project specific goals; (2) the respondent cannot identify portions of the work that can be contracted to MWBE firms; or (3) the respondent determines that contracting portions the work to another entity is not possible.

D. Evaluating MWBE Participation in Solicitations

Every City, County, or Blueprint solicitation issued with project specific goals will contain language and forms describing how respondents must demonstrate their utilization of MWBE firms to meet the project specific goals for MWBE participation.

1. Responsiveness for All Solicitations

The MWSBE Division will review for responsiveness all responses to solicitations that are assigned project specific goals during the solicitation development process. This includes both solicitations that involve the scoring of points and solicitations awarded based primarily on price. The MWSBE Division will deem responses responsive to the MWBE section of the solicitation if they include a completed MWBE Participation Plan that is eligible for points and/or Good Faith Effort documentation. As described below, responses that do not include an MWBE Participation Plan or that include an incomplete MWBE Participation Plan that is not eligible for points may be deemed responsive to the MWBE portion of the solicitation if they include Good Faith Effort documentation.

TABLE 2
MWBE RESPONSE EVALUATION: RESPONSIVENESS

MWBE Response Evaluation: Responsiveness	
Recommendation	**Response**
RESPONSIVE	• Completed **MWBE Participation Plan** and **MWBE Section** that is eligible for full points; • Completed **MWBE Participation Plan** and **MWBE Section** that is eligible for partial points and completed **Good Faith Effort documentation** demonstrating why respondent could not meet the full project specific goal**; OR** • Completed **Good Faith Effort documentation**.
NON-RESPONSIVE	• Completed **MWBE Participation Plan** and **MWBE Section** that is eligible for partial points but no **Good Faith Effort documentation** demonstrating why respondent could not meet the full project-specific goal; • An **MWBE Participation Plan** that is incomplete, unsigned, or otherwise ineligible for points and no **Good Faith Effort documentation; OR** • No **MWBE Participation Plan** or completed **Good Faith Effort Documentation.**

Upon evaluation of all responses to a solicitation, the MWSBE Division will inform the Purchasing or Procurement Division of its evaluation of responsiveness to the MWBE portion of the solicitation. Responses that do not meet the above criteria may be deemed non-responsive by the Purchasing or Procurement Division and be ineligible for award. The Purchasing or Procurement Divisions' determinations of responsiveness will be governed by the applicable Purchasing Manual or Procurement Policy of the appropriate entity (City, County, or Blueprint).

2. Point Evaluation for Scored Solicitations (CCNA Professional Services)

For solicitations seeking professional services governed by the Florida Consultants' Competitive Negotiations Act (CCNA)—professional architectural, engineering, landscape architectural, or surveying and mapping services—that have project specific goals, the MWSBE Division will award points during the solicitation evaluation process. The MWSBE Division may award points for an MWBE Participation Plan and associated documents demonstrating the following: **(1)** committing to utilizing a certified MWBE firm or firms holding an MWBE certification in conformance with the project specific goals, monitoring requirements, and the requirements of this policy; and **(2)** identifying the certified MWBE firm(s). Points will be identified in each solicitation.

3. Point Evaluation for Scored Solicitations (All Other Services)

For solicitations seeking other services not governed by CCNA, for which the solicitation evaluation process involves scoring and has project specific goals, the MWSBE Division will award points during the solicitation evaluation process. Each solicitation will identify the points associated with the MWBE section of each solicitation.

Generally, the maximum number of points available for the MWBE section of solicitation is a total of **12 points**.

A total of **10 points** can be awarded for an **MWBE Participation Plan**:

a. Submission of an **MWBE Participation Plan** will earn **10 points** for meeting the following requirements: **(1)** utilizing an MWBE firm or firms holding an MWBE Program certification; **(2)** meeting the project specific goal for both MBE and/or WBE utilization based on percentage of the contract value paid to the MWBE firm(s); and **(3)** agreeing to monitor the work of the MWBE firms, provide subcontractor and subconsultant payment information to the MWSBE Division, and abide by this policy.

b. Submission of an **MWBE Participation Plan** will earn **5 points** if it meets **(1)** and **(3)** above but only meets a portion of the project specific goal for both MBE and/or WBE utilization in **(2)** above. Such responses must include **Good Faith Effort documentation** demonstrating why respondent could not meet the full project specific goal to remain responsive.

Demonstrating one or more of **Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationships** may earn an additional **2 points.**

Table 3 on the next page indicates the points available for an MWBE scoring for non-CCNA solicitations.

Table 4 on the next page lists all possible MWBE score outcomes and how they may be obtained.

TABLE 3
MWBE EVALUATION

MWBE Evaluation: Scoring	
Score	**Response**
2 Points	MWBE Section demonstrating Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship relationship is eligible to earn 2 points
5 Points	An MWBE Participation Plan that meets the following requirements is eligible for 5 Points: 1. Utilizing an MWBE firm or firms holding an MWBE Program certification. 2. Meeting a portion of the project specific goals for MBE and/or WBE utilization based on the percentage of the contract value ultimately paid to MWBE firms. 3. Agreeing to monitor the work of the MWBE firms, provide subcontractor and subconsultant payment information to the MWSBE Division, and abide by this policy.
10 Points	An MWBE Participation Plan that meets the following requirements is eligible for 10 Points: 1. Utilizing an MWBE firm or firms holding an MWBE Program certification. 2. Meeting the project specific goals for MBE and/or WBE utilization based on the percentage of the contract value ultimately paid to MWBE firms. 3. Agreeing to monitor the work of the MWBE firms, provide subcontractor and subconsultant payment information to the MWSBE Division, and abide by this policy.

TABLE 4
MWBE SCORE OUTCOMES

MWBE Score Outcomes	
Score	**Response**
2 Points	MWBE Section demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship, but the MWBE Participation Plan is ineligible for 5 or 10 points. **Good Faith Effort documentation demonstrating why respondent could not meet the project specific goal is necessary for responsiveness**.
5 Points	Submission of an MWBE Participation Plan that demonstrates (1) utilization of a certified MWBE firm, (2) meets a portion of the project specific goals for MBE and/or WBE utilization, (3) agreeing to monitor. Does not demonstrate Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship. **Good Faith Effort documentation demonstrating why respondent could not meet the project specific goal is necessary for responsiveness**.
7 Points	Submission of an MWBE Participation Plan that demonstrates (1) utilization of a certified MWBE firm, (2) meets a portion of the project specific goals for MBE and/or WBE utilization, (3) agreeing to monitor. Also demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship. **Good Faith Effort documentation demonstrating why respondent could not meet the project specific goal is necessary for responsiveness**.
10 Points	Submission of an MWBE Participation Plan that demonstrates (1) utilization of a certified MWBE firm, (2) meets the project specific goals for MBE and/or WBE utilization, (3) agreeing to monitor. Does not demonstrate Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship.
12 Points	Submission of an MWBE Participation Plan that demonstrates (1) utilization of a certified MWBE firm, (2) meets the project specific goals for MBE and/or WBE utilization, (3) agreeing to monitor. Also demonstrates Joint Venture, Partnership, and Association; Mentor-Protégé; or apprenticeship or externship relationship.

E. Substitutions or Replacements

It is the intent of this policy to ensure that MWBE firms identified by respondents in their responses are the firm(s) with which the respondents actually do business as prime contractors or consultants. However, the prime may, under specific circumstances and for good cause, substitute or replace the original certified MWBE firm with another certified MWBE firm. Such substitution will only be made with the prior approval of the MWSBE Division based on a written statement of good cause. The substitution or replacement must not result in MWBE participation lower than provided for in the original response and the substitution will not dramatically affect the percentage distribution by MWBE groups.
A prime that substitutes MWBE firms without the prior written approval of the MWSBE Division may be subject to penalties.

The MWSBE Division will not count dollars spent with an unauthorized MWBE firm towards satisfaction of the MWBE goal. The prime will remain responsible for meeting the MWBE goals as stated in the original contract.

1. For purposes of this policy, good cause includes, but is not limited to the following circumstances:

    a. The listed MWBE firm fails or refuses to execute a written contract;

    b. The listed MWBE firm fails or refuses to perform the work of its subcontract in a way consistent with normal industry standards;

    c. The listed MWBE firm becomes bankrupt or insolvent;

    d. The listed MWBE firm is ineligible to work on public works projects because of suspension and/or debarment proceedings in accordance with City/County ordinances or applicable state law;

    e. The City or County has determined that the listed MWSBE firm is not a responsible contractor;

    f. The listed MWBE firm voluntarily withdraws from the project and provides to you written notice of its withdrawal;

    g. The listed MWBE firm is ineligible to receive MWSBE credit for the type of work required;

    h. MWBE firm owner dies or becomes disabled with the result that the listed MWBE firm is unable to complete its work on the contract; or,

    i. Other documented examples of good cause submitted to MWSBE Director justifying the termination of the MWBE firm.

2. Good cause does not exist if the failure or refusal of an MWBE firm to perform work results from bad faith or discriminatory action of the prime; if the prime seeks to substitute, replace, or terminate the MWSBE to self-perform the MWSBE contractor's portion of work, or to substitute another MWSBE or non-MWSBE after contract award without prior written approval from the MWSBE.

3. Before submitting a request to terminate and/or substitute a MWSBE firm, the prime contractor must

give notice in writing to the MWBE firm, with a copy to the MWSBE Director, of its intent to request to terminate and/or substitute, and the reason for the request.

F. Change Orders

The Procurement Services or Purchasing Division or City, County, or Blueprint project manager responsible for the contract work will notify the MWSBE Division of all change orders on contracts with MWSBE participation that alter payment to and work performed by any MWSBE firm. This information should be recorded through the contract compliance process and electronic tracking system. Notification of the MWSBE Division and record in the contract compliance process and electronic tracking system is necessary to maintain accurate data and accurate reporting. Accurate data and accurate reporting ensure narrow tailoring of the MWBE Program.

G. Bad Faith or Dishonesty in the Response

Bad faith or dishonesty in violation of the MWSBE Program in the response to a solicitation will be grounds for penalty as provided under **section VIII.J** below. Examples of bad faith or dishonesty in the response include but are not limited to the following:

1. Knowingly and willfully submitting an MWBE Participation Plan that includes false or misleading information for the purpose of winning a contract.

2. Knowingly and willfully submitting an MWBE Participation Plan that the respondent has no intention of following once the contract has been awarded.

3. Failure to in fact utilize an MWBE firm that was originally listed in a response to a solicitation to satisfy project specific goals, unless the respondent meets the requirements of **Section VIII.E** above.

H. Contract Compliance

The contract compliance process and electronic tracking system will have the ability to produce compliance, labor, and contract management reports to the City, County, and Blueprint, and to other stakeholders.

1. All prime contractors and consultants, subcontractors and subconsultants, and MWBE subcontractors and subconsultants must maintain records for the period prescribed by Florida law after contract performance. All parties must make these records available for inspection by the MWSBE Division and the City, County, and Blueprint.

2. Prime contractors and consultants are required to maintain records of all progress payments that they have made. The MWSBE Division will periodically review and verify these records by obtaining certified statements from subcontractors or subconsultants.

I. Monitoring and Enforcement Mechanisms

The MWSBE Division will monitor and enforce this policy utilizing the following measures:

1. The designated MWSBE Division staff member will attend the post award project meeting, that is, the preconstruction or kickoff meeting. Note: In some instances of professional services contracts, a post award meeting may not be held. At such a meeting, MWSBE Division staff will discuss any MWSBE questions and/or procedures and ascertain any corrections or adjustments in the project schedule.

2. An MWSBE Division staff member determines, based upon the work that the MWBE firm is to perform and the project schedule, a schedule for random on-site monitoring. This on-site monitoring verifies the work performed by those contracted MWBE firms.

3. On site monitoring will be performed as applicable by MWSBE Division staff, construction inspectors, or project managers or their designees. Observations of the onsite visit will be documented on a monitoring checklist form. The form is to be completed, signed and dated by the staff person conducting the site visit.

4. Upon request of MWSBE Division staff, the prime must provide invoices or other documentation of payment to MWBE firms. MWSBE Division staff review the documentation submitted and check for MWSBE participation. For contract compliance purposes, MWSBE Division staff member may contact the MWSBE subcontractor to verify appropriate work and payment.

5. When a project involving MWSBE participation is completed and closed, the responsible department will notify the MWSBE Division and provide any information regarding changes in the scope or size of the project that affect MWSBE participation.

6. Any additional fact-finding which may be deemed necessary due to a lack of proper recordkeeping; failure of the prime contractor to cooperate; failure of MWSBE(s) to cooperate; or visible evidence of unsatisfactory performance; and may warrant further investigation.

J. Penalties and Remedies for Non-Compliance of Prime Contractors or Consultants

Penalties for non-compliance of prime contractors or consultants may include any and/or all of the following:

1. Withholding payment for work not completed on the project until the MWSBE Director determines that the contractor has complied with this policy as provided by contract. The MWSBE Director will set forth the basis for any such withholding in a written notice of non-compliance.

2. If the prime contractor is an MWBE firm, the prime may lose its MWBE Program certification for a period not to exceed three years at the discretion of the MWSBE Director, as set forth in a written notice of non-compliance.

3. If the MWSBE Director determines that evidence exists indicating a violation in a response as described under Section VIII.G above, the MWSBE Director will issue a written notice of non-compliance and may recommend that the City Procurement Services Division or County

Purchasing Division disqualify a respondent from further consideration for award.

4. If the MWSBE Director determines that evidence exists indicating that fraud or other unlawful activity has been committed by a certified MWSBE or majority prime contractor, such as falsely reporting the utilization of MWBE firms; or by an individual or firm attempting to benefit from or participate in the MWSBE Program, through fronting activity, false representation of a commercially useful function (CUF), or other fraudulent or unlawful activity, the matter will be referred to the appropriate legal authorities for prosecution and the City, County, or Blueprint Attorney's Office will be notified as appropriate. In the event that a conviction or guilty plea is obtained stemming from such criminal prosecution, the MWSBE Director will issue a written notice of non-compliance and recommend that the Procurement Services Manager or Purchasing Director initiate procedures to bar or suspend the entity from participation in City, County, or Blueprint contracts.

5. If the MWSBE Director determines that evidence exists indicating non-compliance that does not rise to the level of fraud or other unlawful activity by a certified MWSBE or majority prime contractor, the MWSBE Director will issue written notice of the non-compliance and make a recommendation to the Procurement Services Manager and/or Purchasing Director to initiate procedures to bar the firm and its principals from participation in City, County, or Blueprint contracts.

K. Notice of Non-compliance Right of Appeal

1. A prime contractor or consultant in receipt of a written notice of non-compliance will have the right to appeal. Prime must file an appeal in writing to the Office of Economic Vitality Director within seven (7) business days of receipt of the written notice of non-compliance from the MWSBE Director. Failure to file a timely appeal will be considered a waiver of the contractor or consultant's right to appeal the decision of the MWSBE Director.

2. The written appeal will indicate reason(s) and provide additional information, if appropriate, as to why the business believes the notice of non-compliance was issued in error.

3. The MWSBE Division will provide a written response acknowledging receipt of the correspondence to the business within seven (7) business days upon receipt of the formal appeal.

4. The Office of Economic Vitality Director will review the appeal and render a written final decision within thirty (30) calendar days of receipt of the formal appeal. This review by the Office of Economic Vitality Director is the final step available in the administrative process for an appeal of a notice of non-compliance.

IX. SBE PROGRAM

A. Objective

The City, County, and Blueprint intend to afford maximum utilization of MWSBE firms in all aspects of procurement activity and to award contracts with MWSBE participation consistent with the goals contained herein. A race- and gender-neutral program promotes the utilization of all SBEs, including MBE/SBE, and WBE/SBE firms in City, County, and Blueprint contracts.

This Small Business Enterprise Program benefits the City, County, and Blueprint by: (a) promoting competition in City, County, and Blueprint contracting; and (b) promoting economic growth and development in the Market Area. The small business standards set at 200 or fewer employees and a firm net worth of under $5 million are reasonably reflective of business size in the Tallahassee Market Area.

The program will meet its objectives using a combination of the methods below. City Procurement Services and County Purchasing Divisions may schedule a solicitation development meeting including the MWSBE Division to identify whether a particular solicitation may be advertised as an SBE, including MBE/SBE, and WBE/SBE reserved solicitation or unbundled and advertised as multiple solicitations.

B. Reserved Projects

1. Where feasible, the City, County, and Blueprint may reserve contracts valued at $150,000 or less for competition among only certified SBE firms.

2. If no SBE firms respond to a solicitation for reserved projects or the responses submitted are deemed too high or unreasonable based upon the nature of the service or prices for similar services in the local Market Area, then all responses will be rejected, and the project will be re-advertised in the normal manner to all prospective respondents.

C. Unbundling

The City, County, and Blueprint, where feasible, may “unbundle” projects or separate large projects into smaller projects which may be more suitable for small business participation. The MWSBE Division will review selected solicitations to determine whether portions of the project could be unbundled and advertised separately as part of the solicitation development meetings arranged by the City Procurement Services and County Purchasing Divisions. This determination will be made based on the estimated availability of small businesses able to provide specific scopes of work and will consider any economic or administrative burdens which may be associated with unbundling. The MWSBE Division will also monitor whether federally funded projects may be unbundled and advertised through separate solicitations. Similarly, the MWSBE Division will encourage prime contractors or consultants to subcontract to facilitate participation by small businesses. The MWSBE Division will assist the prime contractors or consultants in identifying portions of work which may be unbundled and subcontracted to SBE firms, including MBE/SBE and WBE/SBE

X. MENTOR-PROTÉGÉ AND JOINT VENTURE, PARTNERSHIP, AND ASSOCIATION

The City, County, and Blueprint encourage Mentor-Protégé relationships and Joint Venture, Partnership, and Association to afford prime contracting and consulting opportunities for MWBE firms on City, County, and Blueprint projects. Where applicable, Mentor-Protégé relationships and Joint Ventures, Partnerships, and Associations will be worth 2 points towards a respondent's MWBE Score.

A. Mentor-Protégé Relationship

A Mentor-Protégé relationship exists when an experienced company, firm, or individual (Mentor) provides assistance and training to an MWBE firm (Protégé). The Mentor-Protégé relationship can range from technical or management assistance to the creation of a new agreement or jointly owned firm. No firm will be penalized based upon its participation or nonparticipation in a Mentor-Protégé Program.

1. The Protégé in any proposed Mentor-Protégé relationship must be a certified MWBE firm before application for MWSBE Division approval of the Mentor-Protégé relationship.

2. For purposes of making determinations of business size under this section, the MWSBE Division will not treat Protégé firms as affiliates of Mentor firms, when both firms are participating in an approved Mentor-Protégé Program.

3. The common forms of assistance that a Mentor may provide a Protégé include:

Business Planning	Financial Counseling
Record Keeping	Bonding Technical Assistance
Equipment Utilization	Capital Formation

B. Mentor-Protégé Requirements

The MWSBE Division may approve a Mentor-Protégé relationship in all applicable industries in which Mentor assistance is needed to develop capacity in the Protégé MWSBE firm. A Mentor and Protégé may request MWSBE Division approval of their Mentor-Protégé relationship by submitting annually the Mentor Protégé development plan form. The Mentor-Protégé relationship will initially be limited to three (3) years, with two possible one (1) year extensions, for a maximum of five (5) years. The MWSBE Division will approve in writing for a period of one (1) year from the date of approval Mentor-Protégé relationships that have demonstrated the following requirements:

1. The Protégé must be certified with the MWSBE Division as an MBE, WBE, or SBE firm before entering into a Mentor-Protégée relationship. The Protégé must continue to meet all MWSBE certification criteria to remain eligible for Mentor-Protégé relationship approval.

2. The Mentor and Protégé must be separate firms. Compensation to the Protégé should be relative to the amount of work accomplished rather than an hourly basis.

3. In general, a Mentor may be involved in up to three Mentor-Protégé relationships. A Protégé can only be involved in one Mentor-Protégé relationship.

4. Each year, the Mentor and Protégé will prepare a three-year development plan using the form approved by the MWSBE Division. The development plan will include the following information about the Mentor and Protégé:

   (a) information on the background and experience of the Protégé owners;

   (b) the number of and types of personnel;

   (c) the amount of capital;

   (d) the number, types and values of equipment;

   (e) and the amount and types of projects to be pursued

5. The Mentor and Protégé will annually update and submit the Mentor-Protégé development plan to the MWSBE Division, documenting progress of the Protégé in each category and summarize the work accomplished.

C. Monitoring of Mentor-Protégé Relationships

The MWSBE Division will conduct an annual review of each Mentor-Protégé relationship. If the MWSBE Division determines that the Mentor and/or Protégé are not complying with this policy or if the Mentor and Protégé have not submitted their annual Mentor-Protégé development plan form, the MWSBE Division will issue a written notice of noncompliance and the Mentor and Protégé will have seven (7) business days to cure. If the Mentor and Protégé fail to respond to the notice of noncompliance or fail to cure noncompliance, the MWSBE Division will issue written notice of ineligibility to respond to City, County, and Blueprint solicitations as having a Mentor-Protégé relationship.

D. Joint Venture, Partnership, and Association

A Joint Venture is a joint business association—a separate legal entity like a corporation or LLC—consisting of one certified MWBE firm and one non-MWBE firm or two certified MWBE firms formed to carry on a single business activity which is limited in scope and duration. A Joint Venture must include at least one MWBE firm.

A Partnership or Association is a joint business partnership or association that does not require formation of a legal entity separate from its component firms and that consists of one certified MWBE firm and one non-MWBE firm or two certified MWBE firms formed to carry on a single business activity which is limited in scope and duration. A Partnership or Association must include at least one MWBE firm.

E. Joint Venture, Partnership, and Association Requirements

1. In the case of a Joint Venture, Partnership, or Association consisting of one MWBE firm and one non-MWBE firm, as used in this policy, the smaller firm will comprise a minimum of ten (10%) of the association and will receive a share of contract dollars proportionate to the percentage of participation that the smaller firm represents in the Joint Venture, Partnership, or Association. In the case of a Joint Venture, Partnership, or Association consisting only of certified MWBE firms, the ten percent (10%) participation requirement will also apply.

2. When a Joint Venture, Partnership, or Association is proposed, the MWSBE Director will review and approve a signed and completed Joint Venture, Partnership, and Association Affidavit and all contractual agreements regarding a proposed Joint Venture, Partnership, or Association. The MWSBE Director will determine the degree of MWBE participation resulting from the Joint Venture, Partnership, and Association Affidavit and all agreements, which may be credited toward the evaluation of its response to a solicitation. This determination will be based on the clearly defined roles of the Joint Venture, Partnership, or Association partners, sharing of real economic interest, and proportionate control of the ownership and management of the Joint Venture, Partnership, or Association.

3. The Joint Venture, Partnership, or Association will be responsible for meeting project specific goals and complying with all applicable state and local laws, rules, and regulations governing Joint Venture creation, certification, and bidding.

4. The Joint Venture, Partnership, or Association responses to solicitations will include an MWBE section identifying all firms, the percentage ownership of each firm, and clearly defined scopes of services to be provided by each firm in the Joint Venture on the project.

5. For the MWSBE firm to remain eligible for Joint Venture, Partnership, and Association participation, it must continue to meet all MWSBE eligibility criteria contained in this policy.

F. Monitoring of Joint Venture, Partnership, and Association

The MWSBE Division will conduct an annual review of each Joint Venture, Partnership, and Association agreement. If the MWSBE Division determines that the Joint Venture, Partnership, or Association is not following the requirements of this policy, the MWSBE Division will issue a written notice of noncompliance and the Joint Venture, Partnership, or Association will have twelve (12) business days to respond. If the Joint Venture, Partnership, or Association fails to respond to the notice of noncompliance or fails to cure noncompliance, the MWSBE Division will issue written notice of ineligibility to the Joint Venture, Partnership, or Association that it is no longer eligible to respond to City, County, and Blueprint solicitations as a Joint Venture, Partnership, or Association.

G. Notice of Ineligibility Right of Appeal

5. A Mentor and Protégé or Joint Venture, Partnership, or Association in receipt of an MWSBE Division written notice of ineligibility will have the right to appeal. The Mentor and Protégé or Joint Venture, Partnership, or Association must file an appeal in writing to the MWSBE Director

within seven (7) business days of receipt of the notice of ineligibility from the MWSBE Division.

6. The written appeal will indicate reason(s) and provide additional information, if appropriate, as to why the business believes the notice of ineligibility was error.

7. The MWSBE Director will provide a written response acknowledging receipt of the correspondence to the business within seven (7) business days upon receipt of the formal appeal.

8. Failure to file with the MWSBE Director within the prescribed time frame will constitute a waiver of proceedings under this section. The MWSBE Director will schedule a review within thirty (30) calendar days of receipt of the appeal. This review by the MWSBE Director is the final step available in the administrative process for an appeal of a notice of ineligibility.

9. A firm whose appeal has been denied may re-apply six months after final denial notice.

XI. APPRENTICESHIP OR EXTERNSHIP

An apprenticeship or externship program is a tried-and-true approach for preparing workers for jobs – and meeting the business needs for a highly-skilled workforce that continues to innovate and adapt to meet the needs of the 21st century. The City, County, and Blueprint will encourage businesses to use apprenticeships and externships to reduce worker turnover by fostering greater employee loyalty, increasing productivity, and improving the bottom line. Apprenticeships and externships offer workers a way to start new careers with good wages.

Registered apprenticeship programs and externship programs enable employers to develop and apply industry standards to training programs for registered apprentices that can increase productivity and improve the quality of the workforce. Apprentices who complete registered apprenticeship programs are accepted by the industry as journey workers. By providing on-the-job training, related classroom instruction, and guaranteed wage structures, employers who sponsor apprentices provide incentives to attract and retain more highly qualified employees and improve productivity. Apprenticeships and externships can be flexible training strategies and can be integrated into current training and human resource development strategies. Apprentices and externs can be new hires – or businesses can select current employees to join an existing program. Apprenticeships and externships are a good way to reward high-performing entry-level employees and move them up the career ladder within the business.

Significant talent shortages and skill gaps are slowing companies' efforts to expand, innovate, and thrive. Among these challenges:

- An aging workforce of highly-skilled and experienced workers;
- Attracting new and more diverse talent pools;
- Closing gaps in workers' skills and credentials;
- Investing in talent that can keep pace with the latest industry advances; and
- Implementing workforce training models that effectively develop and "up-skill" talent.

The success of this program requires collaboration among partners – businesses, workforce development intermediaries (such as industry associations or labor organizations), educational institutions, the public workforce system, and other key community organizations. The collaboration requires partners to work together to identify the resources needed, design a program, and recruit apprentices and externs.

A. The Role of Partners

Business Partners – construction and construction-related firms:

1. Identify the skills and knowledge that apprentices and externs must learn
2. Hire new workers, or select current employees, to be apprentices or externs
3. Provide on-the-job training
4. Identify an experienced mentor to work with apprentices and/or externs
5. Pay progressively higher wages as skills increase
6. Can provide related instruction in-house or in partnership with others

Workforce Development Intermediaries - industry association, labor and joint labor-management organization, community-based organization https://nabtu.org/apprenticeship-and-training/:

1. Provide industry and/or workforce specific expertise (e.g. curriculum development) to support employers in a particular industry sector
2. Can serve as sponsor of an apprenticeship or externship program, taking responsibility for the administration of the program, thereby reducing the burden on employers
3. Aggregate demand for apprentices, particularly with small- and medium-size employers, that may not have the capacity to develop an apprenticeship program on their own
4. Can be the provider of related instruction and supportive services as appropriate

Educational Institutions - 4-year college, community college, career and technical education, such as Lively Technical College and Tallahassee Community College:

1. Develop curriculum for related instruction.
2. Can serve as sponsor of an apprenticeship or externship program, taking responsibility for the administration of the program, thereby reducing the burden on employers
3. Deliver related instruction to apprentices and externs
4. Can provide college credit for courses successfully completed
5. Aggregate demand for apprentices and externs

State Apprenticeship Agency – Florida Department of Education https://www.doleta.gov/OA/occupations.cfm:

1. Provide technical assistance and support to new sponsors
2. Answer questions about the apprenticeship model
3. Guide the partners through the steps to develop and register a program
4. Connect businesses with training providers
5. Advise partners on sources of funding to support apprenticeships

B. Core Components

Business Involvement.

Employers are the foundation of every apprenticeship or externship program and the skills needed by their workforce are at the core. Businesses must play an active role in building the program and be involved in every step in designing the apprenticeship or externship.

On-the-Job Training.

Every program includes structured on-the-job training. Apprentices and externs receive hands-on training from an experienced mentor at the job site for typically not less than one year. On-the-job training is developed through mapping the skills and knowledge that the apprentice or extern must learn over the course of the program in order to be fully proficient at the job.

C. Apprenticeship or Externship Requirements and Exceptions

When responding to a solicitation for a construction, design-build, or similar project, in order to receive 2 points as described in section VIII.D, respondent must certify that:

1. The respondent or its subcontractors or subconsultants participate or will participate in an apprenticeship program that is registered with the Florida Department of Education or the United States Department of Labor; or

2. Respondent or its subcontractors or subconsultants participate or will participate in an externship program offered by an educational institution or workforce development intermediary; or

3. The respondent avers that at the time the respondent executes a construction contract, respondent or its subcontractors or subconsultants will be participating in an apprenticeship program that is approved by the Florida Department of Education or the United States Department of Labor.

This program will not apply to a subcontractor or subconsultant that is an MWBE firm if the compensation to be paid under the applicable subcontract for labor costs is less than $1,000,000

D. Required Documentation, Noncompliance, and Reporting

1. *Required documentation*. The prime contractor or consultant must prepare and submit, on a quarterly basis for the duration of the construction contract, accurate and timely records identifying the name, address, trade classification, whether the worker is an apprentice or extern, the labor hours of all workers used by the prime and each subcontractor or subconsultant on the construction project, and the cumulative number of hours worked on the project to date by apprentices. If the apprentice or extern is participating in an apprenticeship or externship program offered by qualified workforce development intermediary or educational institution, quarterly documentation must include documentation required by the workforce development intermediary or educational institution. The prime must require that each of its subcontractors or subconsultants prepare and maintain, for submittal by the prime to the City, County, or Blueprint, accurate and timely records identifying the name, address, trade classification, and labor hours for apprentices and externs used by the subcontractors or subconsultants on the construction project.

2. *Noncompliance*. Failure of a prime contractor or consultant to comply with the requirements of this policy may subject the contractor to all remedies available to the City, County, or Blueprint at law, including but not limited to debarment or suspension of the contractor from consideration for the award of future contracts.

3. *Reporting*. With the help of City, County, and Blueprint staff, the MWSBE Division will annually

prepare a report that includes the total dollar value of awards of construction projects, the number of apprentices hired for the construction projects, the number of apprentices or externs working on construction projects, the number of hours worked by apprentices on the construction projects, and the total labor hours expended on the construction projects.

XII. COUNTING MWSBE UTILIZATION

The following guidelines clarify how to count SBE utilization and how to count MBE and WBE utilization for both project specific goals and overall aspirational MBE and WBE goals for various goods and services.

A. Counting MWSBE Utilization Generally (Construction, Architecture & Engineering, Professional Services, and Other Services)

1. When an MWSBE firm participates in a contract, the City, County, and Blueprint will count only the value of the work actually performed by the MWSBE firm.

2. When an MBE or WBE firm is the prime contractor or consultant, the goal is fulfilled for its certification designation. However, the other project specific goal must also be fulfilled. For example, if a certified MBE firm responds to a solicitation as a prime contractor or consultant, the MBE goal is fulfilled. The MBE prime remains responsible for meeting the remaining WBE goal.

3. The MWSBE Division will count the entire portion of a contract that is performed by an MWSBE firm itself. The MWSBE Division will include the cost of supplies and materials obtained by the MWSBE firm for the work of the contract, including supplies purchased or equipment leased by the MWSBE firm (except supplies and equipment the MWSBE firm purchases or leases from a prime contractor or its affiliate).

4. The MWSBE Division will count the entire amount of fees or commissions that an MWSBE firm charges for providing a bona fide service, such as professional, technical, consultant, or managerial services, or for providing bonds or insurance specifically required for the performance of a contract, provided the MWSBE Division determines that the fee is reasonable and not excessive as compared with fees customarily allowed for similar services.

5. The MWSBE Division will count payments to an MWSBE firm only if the MWSBE is performing a commercially useful function (CUF) on that contract.

6. MBE and WBE prime contractors must perform a CUF of 30 percent of the total cost of the contract with their own forces to meet an applicable MBE or WBE goal.

7. If an MWSBE firm does not perform or exercise responsibility for at least 51 percent of the total cost of its subcontract with its own work force, or 30 percent if the firm is an MBE or WBE firm acting as a prime contractor, or the MWBE subcontracts a greater portion of the work of a contract than would be expected on the basis of normal industry practice for the type of work involved, the MWSBE Division must presume that the firm is not performing a CUF.

8. MWSBE firms are discouraged from subcontracting all or a majority of their work to another firm

or firms. The MWSBE Division will not count the work of an MWSBE firm whose sole intent is collection of a broker's fee or commission and whose employees perform none of the direct labor or service activities specified in the contract.

9. The MWSBE Division will not count any work that an MWSBE firm subcontracts back to:

    a. The prime contractor or consultant, either directly or through any other company or firm owned and/or controlled by the prime contractor, or;

    b. Any firm with which the MWSBE firm has a present business.

10. In the event that a first tier MWSBE firm acting as a subcontractor or subconsultant (in a direct contractual relationship with a prime) contract work to a second tier subcontractor or subconsultant (sub-sub), the MWSBE Division will only count the work if the first tier subcontractor or subconsultant must perform a CUF with 51 percent of its own workforce.

11. When an MBE or WBE firm subcontracts part of the work of its contract to another firm, the value of the subcontracted work may be counted toward MWBE project specific or aspirational goals only if the subcontractor is itself an MWBE firm.

12. When an MBE or WBE firm performs as a participant in a Joint Venture, Partnership, or Association, the MWSBE Division will count a portion of the total dollar value of the contract equal to the distinct, clearly defined portion of the work of the contract that the MBE or WBE firm performs with its own forces.

13. In calculating overall utilization, the MWSBE Division will not count the participation of an MWSBE firm toward until the MWSBE firm has been actually paid for the work.

B. Counting Materials & Supplies

1. If the materials or supplies are directly obtained from a MWSBE manufacturer, the MWSBE Division will count 100 percent of the cost of the materials or supplies. For purposes of this paragraph, a manufacturer is a firm that operates or maintains a factory or establishment that produces, on the premises, the materials, supplies, articles, or equipment required under the contract and of the general character described by the specifications. If the materials or supplies are purchased from an MWSBE regular dealer, the MWSBE Division will count 60 percent of the cost of the materials or supplies. However, this amount cannot be used to satisfy more than 60 percent of any applicable MWBE goal.

2. Packagers, brokers, manufacturers' representatives, or other persons who arrange or expedite transactions are not regular dealers within the meaning of this policy.

3. With respect to materials or supplies purchased from an MWSBE firm which is neither a manufacturer nor a regular dealer, the MWSBE Division will count the entire amount of fees or commissions charged for assistance in the procurement of the materials and supplies or fees or transportation charges for the delivery of materials or supplies required on a job site, provided the MWSBE Division determines that the fees are reasonable and not excessive as compared with fees customarily allowed for similar services. The MWSBE Division will not count any portion of

the cost of the materials and supplies themselves.

C. Counting Trucking/Transport

1. The MWSBE firm must be responsible for the management and supervision of the entire trucking operation for which it is responsible on a particular contract, and there cannot be a contrived arrangement.

2. The MWSBE firm must itself own and operate at least one fully licensed, insured, and operational truck used on the contract.

3. The MWSBE firm receives credit for the total value of the transportation services it provides on the contract using trucks it owns, insures, and operates using drivers it employs.

4. The MWSBE firm may lease trucks from another MWSBE firm, including an owner-operator who is certified as a MWSBE. The MWSBE firm who leases trucks from another MWSBE firm receives credit for the total value of the transportation services the lessee MWSBE firm provides on the contract.

5. The MWSBE firm may also lease trucks from a non-MWSBE firm, including from an owner-operator. The MWSBE firm who leases trucks from a non-MWSBE firm is entitled to credit for the total value of transportation services provided by non-MWSBE lessees not to exceed the value of transportation services provided by MWBE-owned trucks on the contract. Additional participation by non-MWBE lessees receives credit only for the fee or commission it receives as a result of the lease arrangement.

6. A lease must indicate that the MWSBE firm has exclusive use of and control over the truck. This does not preclude the leased truck from working for others during the term of the lease with the consent of the MSWBE firm, so long as the lease gives the MWSBE firm absolute priority for use of the leased truck. Leased trucks must display the name and identification number of the MWSBE firm.

D. Counting Joint Venture, Partnership, and Association

1. Joint Venture, Partnership, and Association respondents will demonstrate that at least one partner to the Joint Venture Partnership, and Association is an MBE or WBE firm, as applicable to the project specific goal, and that such partner is responsible for a clearly defined portion of the work to be performed, will be performing a commercially useful function under the contract, and shares in the ownership, control, management, responsibilities, risks, and profits of the Joint Venture, Partnership, and Association.

2. This demonstration must be verified by pertinent documents and sworn statements. The MWSBE Division may review the demonstration at the time a response to a solicitation is submitted or before the contract award.

3. For the purpose of tentatively awarding credit towards a respondent meeting project specific goals, the MWSBE Division may consider a proposed partnership, that is not yet legally formed,

and which appears in all matters except legal formation as a Joint Venture. However, such partnership will become a legal organization before the Joint Venture enters a contract with the City, County, or Blueprint. Partnerships or Associations need not form a separate legal entity to receive credit.

4. The MWSBE Division may award credit towards a respondent meeting project specific goals calculated as the portion of the total dollar amount of a proposed contract equal to the percentage of the ownership and control held by the qualifying MBE or WBE firm as applicable to the project specific goals in the solicitation.

E. Counting Mentor-Protégé

1. Respondents in a Mentor-Protégé relationship will demonstrate that the Protégé is an MBE or WBE firm, as applicable to the project specific goal, and that the Protégé is responsible for a clearly defined portion of the work to be performed in terms of a percentage of the contract value, will be performing a commercially useful function under the contract, and is receiving training and education in the respondent's industry standards through the Mentor-Protégé relationship.

2. This demonstration must be verified by submission of an MWBE Participation Plan and sworn statements. The MWSBE Division may review the demonstration at the time a response to a solicitation is submitted or before the contract award.

3. The MWSBE Division may award credit towards a respondent meeting project specific goals calculated as the portion of the total dollar amount of a proposed contract equal to the clearly defined portion of the work to be performed.

XIII. REPORTING

The effectiveness of the MWBE Program and SBE Program will be measured by a review of data indicating dollars spent with MWSBE firms as a percentage of the total spending of the City, County, and Blueprint. Program effectiveness will also be measured by efforts of City, County, and Blueprint staff to provide prime contracting opportunities for MWSBE firms. The following activities will be completed to ensure the effective tracking of these efforts:

A. Prime Contractor and Consultant Responsibility

Each prime contractor or consultant will continuously maintain, compile, and make available to the MWSBE Division each month during the life of a contract data relating to its use of subcontractors or suppliers, both MWSBE firms and non-MWSBE firms, on City, County, Blueprint, and federally funded projects. This information will include without limitation the following information for each of the subcontractors and suppliers utilized by the Contractor on the project:

1. A description of the type of work, by applicable code(s), of contracts awarded to subcontractors and/or suppliers;

2. The dollar value of contracts paid to MWSBE or DBE firms;

3. Contact information for the subcontractors, subconsultants, and suppliers; and

4. A description of progress towards fulfilling any project specific MWBE goal.

B. Project Closeout

At the close of every project, all prime contractors and consultants will be asked to provide a Final Pay Affidavit documenting all information relating to its use of subcontractors, subconsultants, or suppliers.

C. Purchasing Card Data

The purchasing card vendor will supply expenditure data with both MWSBE certified firms and non-MWSBE certified firms. This data will automatically populate into the contract compliance process and electronic tracking system. City and County information technology or procurement employees will develop a method of securing an import file that extracts the data from City and County servers and uploads the data into the contract compliance process and electronic tracking system. Dollars spent with MWSBE firms will be counted in accordance with Section XII above.

D. Annual Report

The MWSBE Division will prepare an annual report based on the information submitted by each prime contractor or consultant and information from the City Procurement Services Division and County Purchasing Division regarding the use of MWSBE firms as prime contractors or consultants. The annual report will identify awards of City, County, and Blueprint contracts to MWSBE firms, prime use of MWSBE firms, prime progress in achieving project specific goals, and other MWSBE information.

XIV. MBE, WBE, AND SBE FIRM CERTIFICATION

An eligible MBE firm is a business concern that is both owned and controlled by minorities. An eligible WBE firm is a business concern that is both owned and controlled by women. This means that minorities or women must own at least fifty-one percent (51%) of the business and that they must control the management and daily operations of that business. An eligible SBE firm may be a business concern owned by a person who is neither a minority nor a woman meeting the criteria in **Section XIV.C** below.

A. Minority and Women Eligibility Standards

1. Minority Group Membership

Bona fide minority group membership will be established on the basis of the individual's documented claim that they are a member of a minority group as defined in these procedures and is so regarded by that particular minority community and is a United States citizen or lawfully admitted resident alien. However, the MWSBE Division is not required to accept this claim if it determines the claim to be invalid as discussed below.

2. Controlled by Minorities or Women

An eligible minority or woman owned business enterprise will be an independent business. The ownership and control by minorities or women will be real, substantial, and continuing, and will continue beyond the pro forma ownership of the firm as reflected in its ownership documents. The minority or women owners will enjoy the customary incidences of ownership and will share in the risks and profits commensurate with their ownership interests, as demonstrated by an examination of the substance of the firm rather than form or arrangements.

Recognition of the business as a separate entity for tax or corporate purposes is not necessarily sufficient for recognition as an MWBE. In determining whether a potential MWBE is an independent business, the Minority, Women, and Small Business Enterprise Division will consider all relevant factors, including the date the business was established, the adequacy of its resources for the type of work specified, and the degree to which financial, equipment leasing, and other relationships with non-minority firms vary from established industry practice.

3. Operational Control

The primary consideration in determining operational control and the extent to which the minority person or woman actually operates the business will rest upon the peculiarities of the industry of which the business is a part.

Accordingly, in order to clarify the level of operational involvement of the minority person or woman in the business to be deemed as an MWBE firm, the following examples are not all inclusive:

a. The minority person or woman will have experience in the industry for which certification is sought.

b. The minority person or woman will demonstrate that basic decisions pertaining to the daily operation of the business are independently made.

c. The minority person or woman will technical competence in the industry for which certification is sought. Technical competence in this sense does not mean expert knowledge. It does mean the minority person or woman should have a working knowledge of the technical requirements of the business needed to operate in the industry.

4. Managerial Control

Control in this instance means that the minority person or woman has the demonstrable ability to make independent and unilateral business decisions necessary to guide the future and destiny of the business. Corporate bylaws and partnership agreements or other agreements should be free of restrictive language diluting the control of the minority person or woman, thus preventing or restricting him or her from making those decisions that affect the destiny of the business. Agreements for support services are permitted as long as the owner's power to manage the company or firm is not restrictive or impaired.

A minority person or woman must produce documentation demonstrating managerial control. A minority person or woman can demonstrate managerial control in any number of ways. This list below is not exhaustive; the MWSBE Division may accept documents demonstrating managerial control that are not on the list below. The MWSBE Division will accept the following examples of documentation of managerial control:

a. Authority and responsibility to sign payroll checks and letters of credit.

b. Authority for negotiations and signature responsibility for insurance and/or bonds.

c. Authority for negotiations and signature services, and/or

d. Authority for contractual negotiations with signature responsibility.

5. Non-Minority Management

If the owners of the firm who are not minorities or women are disproportionately responsible for the operation of the firm, then the firm is not an MBE or WBE firm within the meaning of this policy. Where the actual management of the firm is contracted out to individuals who are not minorities or women, those persons who have, for example, the ultimate power to hire and fire, for the purpose of this program, will be considered as controlling the business. Therefore, a firm with non-minority management is ineligible for MBE or WBE certification. Such a firm may be considered an SBE firm.

B. Certification Process Procedures

1. The MWSBE Division will be solely responsible for certification of minority, women and small businesses. This certification will include but is not limited to:

a. Documentation of property and business income.

b. Documentation of appropriate professional certification and/or registrations.

c. Documentation of minority status claimed, which may include copies of Driver's License, Voter Registration Card, Birth Certificate, etc. The appropriate department's engineering staff will be responsible for pre-qualifying construction contractors, if applicable.

d. City/County business licenses/business tax certificate, if applicable.

e. Bank/credit references for the company or firm.

f. Last two years federal income and state sales tax returns and/or current Financial Statement.

g. Copy of incorporation articles/list of officers.

h. Notarized affidavit attesting to minority or non-minority female status.

i. Inventory of major equipment, if applicable

j. Presence on State of Florida or other MWBE lists, if applicable.

2. Once an applicant has submitted the application and all appropriate supporting documentation, certification review will be completed within forty-five (45) days and the appeal procedures as outlined in Section XI.H below will apply.

C. Certification Criteria

For Certification as an MBE, WBE, or SBE firm, the applicant must meet all of the criteria indicated in the chart below. Businesses may be Certified as follows: (1) MBE firm; (2) WBE firm; (3) SBE firm; (4) MBE/SBE firm; or (5) WBE/SBE firm. Businesses that qualify for certification as an MBE or WBE firm may be certified as an SBE firm.

Table 5 on the next page lists MBE, WBE, and SBE Certification Eligibility Criteria.

TABLE 5
MBE, WBE AND SBE CERTIFICATION ELIGIBILITY CRITERIA

MBE, WBE and SBE Certification Eligibility Criteria			
	Type of Certification (must meet ALL criteria marked X)		
	MBE	WBE	SBE
1. Majority Owner(s) must be a Minority or Minorities who manage and control the business. In the case of a publicly owned business, at least 51% of all classes of the stock, which is owned, will be owned by one or more of such persons.	X		
2. Majority Owner(s) must be a Woman or Women who manage and control the business. In the case of a publicly owned business, at least 51% of all classes of the stock, which is owned, will be owned by one or more of such persons.		X	
3. Majority Ownership in the business will not have been transferred to a woman or minority, except by descent or a bona fide sale within the previous 2 years.	X	X	
4. Majority Owner(s) must reside in the four-county Market Area of Leon, Gadsden, Jefferson, or Wakulla Counties.	X	X	X
5. Majority Owner(s) must be a United States citizen or lawfully admitted permanent resident of the United States.	X	X	X
6. Business must be legally structured either as a corporation, organized under the laws of Florida, or a partnership, sole proprietorship, limited liability, or any other business or professional entity as required by Florida law.	X	X	X
7. Business must be Independent and not an Affiliate, Front, façade, broker, or pass through company or firm.	X	X	X
8. Business must be a for-profit business concern.	X	X	X
9. Business must be currently located within the four-county Market Area of Leon, Gadsden, Jefferson, or Wakulla Counties.	X	X	X
10. Business must have all licenses required by local, state, and federal law.	X	X	X
11. Business must currently be licensed and engaging in commercial transactions typical of the field, with customers in the Local Market Area other than state or government agencies, for each specialty area in which Certification is sought. Further, if a Supplier, business must be making sales regularly from goods maintained in stock.	X	X	X
12. Business must have expertise normally required by the industry for the field for which Certification is requested.	X	X	X
13. Business must have a business net worth no more than $5 million.	X	X	X
14. Business must employ 200 or fewer full- or part-time employees, including leased employees.	X	X	X
15. Business must have been established for a period of one (1) calendar year prior to submitting its application for MWSBE certification.	X	X	X
16. Business must have a record of satisfactory performance on no less than three (3) projects, in the business area for which it seeks certification, during the past 12 calendar months.	X	X	X

D. Reciprocity

Upon written request and submission of required documentation, the MWSBE Division will grant reciprocal MBE, WBE, or SBE certification to qualifying applicant firms. The MWSBE Division will grant reciprocal MBE or WBE certification to applicant firms domiciled in the Market Area (Leon, Gadsden, Jefferson, and Wakulla) that hold current MBE or WBE certification with the Florida Department of Management Services Office of Supplier Diversity (OSD). The MWSBE Division will grant reciprocal SBE certification to applicant firms domiciled in the Market Area that hold current Veteran-owned (VBE) certification with OSD. The term of reciprocal MBE, WBE, or SBE certification will follow the term of the applicant firm's certification with OSD.

The applicant firm will provide the MWSBE Division with documentation authenticating its OSD certification and expiration dates. The MWSBE Division reserves the right to request any additional documentation to verify or clarify the authenticity of the information provided.

An applicant firm that is currently under suspension or debarment by any governmental entity or that has been denied certification by the MWSBE Division in the six (6) months preceding its request for reciprocal certification may not use this reciprocity policy to circumvent the imposed sanctions or actions of the governmental entity.

E. Certification Review

Within forty-five (45) days of the completed application affidavit and required supporting documentation MWSBE Division staff will notify the applicant of approval or denial of certification. Applicants approved for certification will be assigned a certification number and notified by email. Certified MWBEs will be listed in the Online MWSBE Directory.

F. Recertification

1. The MWSBE Division will send a Recertification Application link via email from B2GNow to the appropriate MWSBE firm at least thirty (30) days prior to the certification expiration date. The MWSBE Recertification Application link will be accompanied by appropriate instructions.

2. When the online Recertification Application is received by OEV, it is reviewed for comparison with the content of the original application. All appropriate changes are noted in the online MWSBE Directory. MWSBE Recertification is valid for two years.

3. If there has been a change in ownership interest and/or control, appropriate supporting documentation will be required for continued certification.

A company or firm that fails to submit all appropriate information by the anniversary date of certification will be deemed to have abandoned its application for recertification.

G. Denial of Recertification

If the review by the MWBSE Division indicates that the previously certified MWSBE firm no longer meets eligibility standards as defined in these procedures for recertification as a MWSBE firm the application for recertification will be denied.

The MWSBE Division will notify the MWSBE firm by certified mail that the staff review has indicated that the business is no longer eligible for certification, and that the applicant will have the right to appeal such recertification denial in accordance with **Section XIV.H** below.

H. Decertification

The MWSBE Division reserves the right to revoke the certification of a business at any time such action is deemed necessary. Grounds for revocation of certification will include but are not limited to the following:

1. Submission of fraudulent information as part of the certification process.
2. Failure to promptly report any change in ownership or control of the firm.
3. Failure to promptly report any name, address or phone number changes of the firm.
4. Failure to respond to request for information from the MWSBE Division.
5. Fraudulent representation or participation on City or County projects or contracts.
6. Submittal of fraudulent information or documentation to the MWSBE Division as may be requested or as part of the normal procurement process.
7. Revocation of certification by the State of Florida, Department of Management Services or the State of Florida Department of Transportation.

I. Certification Denial Right of Appeal

1. Any business denied certification, recertification, or decertified by the MWSBE Division will have the right to appeal such denial. Notice of appeal will be filed in writing to the MWSBE Director within seven (7) business days of receipt of the notice of denial from the MWSBE Division.
2. The Notice of Appeal will indicate the reason(s) and provide additional information, if appropriate, as to why the business believes the denial was in error.
3. The MWSBE Director will provide a written response acknowledging receipt of the correspondence to the business within seven (7) business days upon receipt of the formal appeal.
4. Failure to file with the MWSBE Director within the prescribed time frame will constitute a waiver of proceedings under this section. The MWSBE Director will schedule a review within thirty (30) calendar days of receipt of request for appeal and issue a final written decision. This review by the MWSBE Director is the final step available in the administrative process for an appeal of denial of original certification, recertification, or decertification.
5. A firm whose application has been denied may re-apply six months after final denial notice.

J. Review

The policies promulgated under this regulation will be reviewed and evaluated on an annual basis. A full sunset review will be conducted within five (5) years of the adoption of these policies.

XV. MBE, WBE AND SBE FIRM GRADUATION

A. Certified MWSBE firms will graduate from MWSBE certification when the firm net worth exceeds $5 million or they exceed 200 employees.

B. Any interested party may request an evaluation of an MWSBE firm. The MWSBE Division will evaluate the firm at the time of its recertification. If the MWSBE Division determines that the firm has exceeded the size standards described above, the following provisions will apply:

1. Notification. The MWSBE Division will issue a letter of notification to the firm notifying the firm of its graduation. The letter of notification will set forth findings for every material issue relating to the basis of the program graduation with specific reasons for each finding based on facts and in accordance with law, regulations, and this policy.

2. Appeal. The firm will be allowed 45 days from the date of the letter to appeal the decision. To appeal the decision, the company or firm must submit in writing to the MWSBE Division information explaining why the graduation is not warranted. Upon receipt of the appeal, the MWSBE Division will notify the firm in writing of the receipt of the appeal.

3. Review. If the firm appeals its graduation within the requisite 45 days, the Director of PLACE will review the appeal. The Director of PLACE will issue a written decision within 15 days of receipt of the appeal via USPS or certified mail.

4. After the effective date of a firm's graduation as provided for herein, a firm is no longer a certified MWSBE firm. However, the firm remains obligated to complete previously-awarded contracts and/or subcontracts, including any priced bids that may be exercised.

XVI. CAPACITY BUILDING COMPONENT

To ensure that opportunities to participate are available to the maximum number of interested, available, and qualified businesses, the MWSBE Division will develop and implement a comprehensive capacity building component (CBC) that includes outreach and technical assistance. The CBC is aimed at increasing business participation in the City's, County's, and Blueprint's contracting and procurement process. This program may include, without limitation, any or all of the following:

A. Outreach and information dissemination;

B. Technical assistance program to prepare MBE, WBE, and SBE firms to compete for specific contracts;

C. Implement and monitor a supportive services program to develop and improve immediate and long-term business management, record keeping and financial and accounting capability for businesses;

D. Develop and provide services to help businesses improve their long-term development, increase their opportunities to participate in a variety of kinds of work, handle increasingly significant projects, and achieve self-sufficiency;

E. Establish a program to assist new, start-up or emerging businesses; and assist businesses in developing their capability to utilize emerging technology and conduct business through electronic media.

F. Establish a method of evaluating MBE, WBE, and SBE firms and prime contractors and consultants in coordination with the City Procurement Services Division, County Purchasing Division and City, County, and Blueprint project managers to provide feedback on performance and evaluate firm capacity.

XVII. FORMS

OEV will work with the City Procurement Services Division and County Purchasing Division to standardize all bid solicitation forms, requests for proposals, construction contracts, work order agreements and professional service contracts to include a statement referring to the MWSBE policy and the expected level of MWSBE participation.

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Review of SBE Programs Administered by Other Jurisdictions

Orange County, Florida – Small Business Enterprise (SBE) Program

Orange County administers its race-neutral Small Business Enterprise (SBE) Program through the Vendor Services Division and codifies it in policies and ordinances. Eligibility for certification is geographically focused: certified firms must be located and managed within the Orlando Metropolitan Statistical Area—Orange, Osceola, Seminole, and Lake Counties—and meet the applicable small-business standards referenced in Section 288.703, Florida Statutes, which set the threshold of fewer than 200 employees and a company net worth below $5 million.

Orange County currently applies a 15 percent overall annual aspirational goal for SBE participation in County contracting. The goal is non-mandatory and is reviewed annually based on SBE availability by industry, availability data collected through the County's compliance monitoring system, and actual SBE utilization. This structure ties the County's overall participation objective to measurable market availability and contracting performance.

For formal solicitations where SBE participation is available, the County may establish contract-specific participation requirements of up to 30 percent. Rather than applying a uniform requirement to all procurements, the percentage is determined by the availability of certified SBEs capable of performing the work or providing the required supplies on a project, contract, or task-authorization basis. Certain procurements—including requests for quotes, sole-source and emergency purchases, and contracts receiving a waiver—are excluded.

Orange County does not operate a traditional SBE sheltered market or reserve contracts exclusively for SBE competition. Instead, its procurement framework permits direct awards to certified SBE firms for purchases up to $190,000, providing a targeted mechanism for creating prime contracting opportunities without establishing a broader set-aside program.

The Vendor Services Division administers certification, procurement procedures, and SBE compliance, and contractors must use County-certified firms to qualify for recognized SBE participation. For OEV's comparative review, Orange County provides a useful model because it combines an annual aspirational benchmark, availability-based contract-specific goals, geographic eligibility requirements, compliance monitoring, and direct-award authority within a race-neutral SBE framework.

The Orange County model is particularly relevant for OEV's consideration because it demonstrates an approach in which participation strategies are calibrated to supplier availability and individual procurement opportunities rather than applied uniformly across all contracts. Its use of direct awards also presents a distinct alternative to a formal sheltered market. These features provided specific practices for OEV to assess against local procurement data, supplier availability and capacity, and operational requirements when developing data-informed, narrowly tailored recommendations for the Tallahassee–Leon County SBE program.

Alachua County, Florida – Small Business Enterprise (SBE) Program

Alachua County administers its race-neutral Small Business Enterprise (SBE) Program through the Equal Opportunity Division and is codified in policy. Certified firms must perform a useful business function and be located within the designated SBE Zone, consisting of Alachua, Bradford, Clay, Columbia, Gilchrist, Levy, Marion, Putnam, and Union Counties.

The program recognizes two SBE classifications based on business size and financial capacity. *Emerging Small Businesses* may have no more than 25 permanent, full-time employees and a net worth not exceeding $1 million; *Established Small Businesses* are subject to the same employee limit with a net worth not exceeding $5 million. These classifications distinguish firms by relative size and capacity but do not establish separate contracting tiers.

Alachua County establishes an annual aspirational goal of 15 percent SBE participation in County contracting, providing an overall benchmark for SBE utilization.

The county may reserve designated contracts for competition exclusively among certified SBEs when sufficient capable and qualified firms are available to provide effective competition. Certain construction procurements may also require predetermined levels of SBE subcontracting. This authority creates a sheltered market, providing targeted opportunities for qualified SBEs to compete amongst themselves for county business.

Alachua County is the only jurisdiction identified in OEV’s comparative review that uses both bid-price and proposal-evaluation preferences for SBE participation. Certified SBEs may receive a 5 percent bid-price preference, up to $50,000, while prime contractors committing at least 15 percent SBE subcontract participation may receive a 3 percent preference, subject to the same limit. For competitive proposals, certified SBEs may receive evaluation points equal to 5 percent of available points, while vendors committing at least 30 percent SBE participation may receive points equal to 3 percent. Preferences are not cumulative and do not apply to SBE-reserved/sheltered market contracts.

The Equal Opportunity Division administers certification and maintains the certified SBE vendor base. For OEV’s review, Alachua County demonstrates how aspirational goals, business classifications, sheltered market competition, and procurement preferences can operate within a single SBE framework.

From an economic development perspective, this approach warrants consideration as a potential mechanism to expand contracting opportunities, build supplier capacity and past performance, and strengthen small businesses’ ability to compete for larger opportunities.

The City of Jacksonville – Small Emerging Business Enterprise (JSEB) Program

The City of Jacksonville administers its race-neutral Jacksonville Small and Emerging Business (JSEB) Program through the Equal Business Opportunity Office (EBO), codified in policy. The program supports local small and emerging businesses in obtaining direct contracting and subcontracting opportunities with the city. Certified JSEBs must have annual gross revenues of no more than $12 million.

Jacksonville establishes an overall goal of at least 20 percent JSEB participation in City contracting, subject to applicable law and the availability of qualified firms. The city also identifies a goal of at least 20 percent JSEB participation in its Capital Improvement Program (CIP) through direct contracting and subcontracting. These are municipality-wide objectives advanced by identifying procurements suitable for JSEB participation rather than applying a uniform percentage to every solicitation.

Individual procurement goals are established based on the scope of work and availability of qualified JSEBs. The city considers industry practices, user-department requirements, prior JSEB utilization, and the availability of at least two JSEBs capable of performing the identified work. This allows participation requirements to reflect the specific procurement and available supplier market.

Jacksonville emphasizes prime contracting opportunities, with at least 50 percent of JSEB contracts to be awarded through direct contracting. Procurements may also be unbundled, when feasible, into opportunities appropriately scaled for qualified JSEBs. Projects reserved for competition among certified JSEBs create a sheltered market for those designated procurements.

Jacksonville authorizes a micro-business classification for JSEBs with average annual gross revenues not exceeding $3 million over the preceding three years. The program is intended to provide smaller JSEBs with an adequate share of direct contracting and subcontracting opportunities. It may include revenue-based participation tiers to align opportunities with business size and capacity as determined by the program administrator. For OEV's comparative review, Jacksonville is distinguished by the connection between its municipality-wide participation goal and project-specific analysis of scope and supplier availability, coupled with a strong emphasis on direct prime contracting, procurement unbundling, and opportunities for micro-businesses.

From an economic development perspective, these strategies warrant consideration because they provide pathways for smaller firms to gain prime-contracting experience, establish past performance, and build capacity for larger contracting opportunities. Jacksonville's approach provides a potential best practice for OEV to assess against local procurement data, supplier availability and capacity, competitive conditions, and operational requirements in developing data-informed, narrowly tailored recommendations for the Tallahassee–Leon County SBE program.

Hillsborough County – Small Business Enterprise (SBE) Program

Hillsborough County administers its race-neutral Small Business Enterprise (SBE) Program through the Economic Development Department and the Small Business Enterprise Division, linking supplier development to the County's broader objectives for business growth, job creation, and economic development. Eligible firms must be headquartered in Hillsborough, Pinellas, Pasco, or Hernando County, with average annual gross sales not exceeding $8 million for consulting and contractual services and $12 million for construction services.

Hillsborough County establishes annual SBE participation goals of 10 percent for commodities and services and 20 percent for construction. These are countywide objectives and are not uniformly applied to every solicitation.

Construction projects valued at $200,000 or more undergo a pre-solicitation review to determine an appropriate SBE participation strategy. Project-specific goals may not exceed 30 percent and are based on the scope of work, subcontracting opportunities, availability of qualified SBEs, historical participation, and other project-specific factors. This approach aligns participation requirements with work that qualified SBEs are available and capable of performing.

The county may designate projects for competition exclusively among registered SBEs and identify larger projects that can be divided into smaller contracting opportunities, thus creating a sheltered market. Contract sizing is particularly relevant to economic development because smaller procurements can provide qualified firms opportunities to compete as prime contractors, build past performance and capacity, increase revenues, and support employment growth.

For contracts exceeding $20 million, Hillsborough County permits qualifying SBE participation deeper within the subcontracting chain to count toward project goals. Second- and third-tier participation refers to an SBE performing work within the subcontracting chain. This provides an entry point for smaller firms that can perform portions of major projects but may not yet have the capacity to contract directly with the prime contractor.

Hillsborough County is particularly relevant to OEV because its SBE program is housed within the county's economic development department, where supplier participation is linked to broader business growth objectives. The county combines project-specific goal setting, set-asides, contract sizing, and expanded participation on large contracts to create contracting opportunities at distinct levels of business capacity.

From an economic development perspective, the model demonstrates how public procurement can help firms enter the contracting market, build capacity, progress toward larger opportunities, and support business expansion and job creation.

Omaha, Nebraska – Small Business Enterprise (SBE) Program

The City of Omaha, Nebraska, administers its race-neutral Small and Emerging Business (SEB) Program through the Economic Development Department and codifies it in a policy that aligns small-business procurement with broader economic development objectives. Certified firms must meet applicable eligibility requirements, including a company net-worth limit of approximately $2.047 million.

Omaha establishes an overall SEB participation goal of 14 percent of contracted dollars. Departments identify project-level opportunities that support this municipality-wide objective based on the availability and capacity of qualified firms.

Omaha uses Tier I and Tier II classifications to differentiate eligible businesses. Tier I firms must maintain a headquarters or physical working office in a qualifying area of Douglas County and have at least 20 percent of their employees residing in a qualifying area. A qualifying area is a census tract where 30 percent or more of residents are below the poverty level, or a contiguous census tract where at least 15 percent of residents are below the poverty level. These poverty thresholds are determined using census data updated at least every ten years, beginning in 2010. Tier II consists of other small and emerging businesses authorized by the City.

Unlike classifications based solely on business size, Tier I incorporates business location and employee residency, linking supplier participation to place-based economic conditions.

Before solicitation, the City evaluates whether a project, or portion of a project, can be performed by qualified SEBs. Where sufficient capacity exists, opportunities may be designated as full or partial SEB set-asides, with priority given first to Tier I and then Tier II firms.
Omaha is distinguished in OEV's comparative review by integrating supplier development with a place-based economic development strategy. Its tier structure uses business location and workforce residency to prioritize certain certified firms, while set-asides create targeted opportunities for qualified SEBs to compete for City contracts.

From an economic development perspective, the model warrants consideration because it demonstrates how public procurement can support small-business growth and job creation while connecting contracting opportunities to communities experiencing greater economic need.

Columbus, Ohio–Small Business Enterprise (SBE) Program

The City of Columbus, Ohio, uses its codified Small Regional Business Enterprise (SRBE) Program to expand contracting opportunities for certified small businesses through participation goals, sheltered-market competition, and structured prime contracting. It is administered in the Office of Diversity and Inclusion. To qualify, a local for-profit firm must have a physical presence within the geographic boundaries of one (1) of the following Ohio counties: Delaware, Fairfield, Fayette, Franklin, Licking, Madison, Pickaway, or

Union. To determine certification eligibility, Columbus, OH, uses federal Small Business Administration standards to determine whether a firm qualifies for its SBE program. Columbus sets its small-business threshold below the full SBA size standard. Based on its primary NAICS code, a business may qualify if its average gross annual receipts over the previous five years are no more than 25% of the applicable SBA revenue size standard, or if its average employment over the previous 12 months is no more than 50% of the applicable SBA employee size standard.

Columbus establishes SRBE utilization goals for contracts valued at $100,000 or more, with performance reviewed annually. Current goals are 10 percent for construction services, 15 percent for professional services and goods, and 10 percent for general services. These are citywide participation objectives rather than uniform requirements applied to every contract.

Individual contract goals are based on the scope of work, subcontracting opportunities, availability of certified SRBEs, historical participation in similar projects, and opportunities to unbundle work into smaller packages. This approach aligns participation requirements with the specific procurement activity and available supplier market.

Contracts valued at less than $250,000 may be reserved exclusively for certified SRBEs when at least two qualified firms are available. This creates a sheltered market for designated procurements, providing qualified small businesses an opportunity to compete directly for city contracts.

For contracts valued at less than $100,000, Columbus operates a Small Contracts Rotation Program for construction, professional services, and goods and services. Certified SRBEs enroll by industry, and eligible contracts are offered sequentially to qualified firms on the applicable rotation list. The program provides a structured method for distributing lower-dollar prime contracting opportunities among qualified small businesses.

Columbus is distinguished in OEV's comparative review for using contract value and supplier availability to create different pathways into city contracting participation goals, including broader utilization, sheltered competition for eligible contracts below $250,000, and structured rotation for contracts below $100,000.

From an economic development perspective, the Small Contracts Rotation Program is particularly relevant because appropriately scaled prime contracts can help small businesses establish past performance, strengthen capacity, and position themselves to compete for larger opportunities.

Miami-Dade–Small Business Enterprise (SBE) Program

Miami-Dade County administers its race-neutral Small Business Enterprise (SBE) Program through its procurement and small-business development functions, codified by policy. Specialized programs for Construction Services, Architecture & Engineering, and Goods & Services use business size, capacity, and the availability of qualified firms to structure procurement opportunities as a sheltered market strategy. Per policy, *CSBE objective* means the objective of assuring that not less than ten (10) percent of the County's total annual expenditures for construction are expended with CSBEs.

The SBE Construction Services (CSBE) Program classifies firms into four levels based on three-year average gross revenues: Level I ($0–$2 million), Level II ($2–$5 million), Level III ($5–$10 million), and Level IV ($10–$15 million). Construction contracts may be designated as SBE set-asides when it is determined that the number of certified firms available and capable of performing the scope of work will support meaningful competition and competitive pricing. The availability of qualified firms, therefore, determines whether a sheltered competition is viable, while the level structure aligns the opportunity with firms of corresponding capacity.

The SBE Architecture & Engineering Program uses four revenue-based tiers, with thresholds that vary by professional discipline, ranging from $500,000 for Tier 1 firms to $8 million for Tier 4 firms. Certified firms and eligible joint ventures may also receive selection-factor consideration in qualifications-based procurements. *CBE-A/E Objective*, as defined in policy, assures that not less than 10 percent of the County's total annual expenditures for professional architectural, landscape architectural, engineering, surveying, and mapping services are expended with certified CBE-A/Es for project contracts.

The SBE Goods & Services Program uses four revenue-based tiers: Tier 1 ($0–$750,000), Tier 2 ($750,000.01–$2 million), Tier 3 ($2–$5 million), and Tier 4 ($5–$8 million). The tiers distinguish firms by relative size and capacity for SBE procurement purposes. Within each fiscal year, County departments are required to expend 100 percent of the total value of contracts for goods valued at $250,000 or less with certified SBEs.

The departmental SBE requirement applies unless the Division of Small Business Development (SBD) determines that there are not enough qualified SBEs available or that the contract can only be performed by a non-SBE firm. At least two qualified SBEs must be available for a contract to be competitively bid as an SBE set-aside. For Public Health Trust contracts, the applicable contract value remains $100,000.

For contracts not set aside for SBEs, Tier 1 and Tier 2 SBEs receive a 10% bid preference, while Tier 3 and Tier 4 SBEs receive a 5% bid preference. For contracts set aside for SBEs, Tier 1 firms receive a 10% preference, Tier 2 firms receive a 5% preference, and Tier 3 and Tier 4 firms receive no preference. Tier classifications also include the applicable manufacturer and wholesaler employee-size thresholds.

For evaluation purposes, departments deduct the applicable preference from the firm's total bid or quoted price to determine its evaluated price. SBD must also provide the Board with an annual report on contract awards to SBEs.

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Blueprint Intergovernmental Agency
Board of Directors
Agenda Item #8

September 24, 2026

Title:	Second and Final Public Hearing on the Proposed Fiscal Year 2027 Operating Budget and Fiscal Year 2027 – 2031 Five-Year Capital Improvement Program Budget for the Blueprint Intergovernmental Agency and Approval of Budget Resolutions
Category:	Public Hearing
Intergovernmental Management Committee:	Vincent S. Long, Leon County Administrator Reese Goad, City of Tallahassee Manager
Lead Staff / Project Team:	Artie White, Director, Department of PLACE Autumn Calder, Director, Blueprint Keith Bowers, Director, Office of Economic Vitality Megan Doherty, Planning Manager, Blueprint Tres Long, Blueprint Finance Officer

STATEMENT OF ISSUE:

This item requests the Blueprint Intergovernmental Agency Board of Directors (IA Board) conduct the second and final public hearing to adopt the Proposed Fiscal Year (FY) 2027 Operating Budget Resolution (Attachment #1) and Proposed FY 2027-2031 Capital Budget Resolution (Attachment #2). This item incorporates the direction the IA Board provided at its June 11, 2026, workshop on the proposed FY 2027 Operating Budget and Five-Year Capital Improvement Program (CIP), as approved by IA Board vote at the regular meeting held later that same day. The first public hearing was conducted at the September 10, 2026, Citizens Advisory Committee (CAC) meeting.

FISCAL IMPACT

This item has a fiscal impact. As presented, the FY 2027 budget is balanced and aligns with Agency policies and previous IA Board direction.

RECOMMENDED ACTION:

Option #1: Conduct the Public Hearing to approve and adopt the FY 2027 Blueprint Intergovernmental Agency Operating Budget as presented and approve the FY 2027 Operating Budget Resolution (Resolution No. 2026-22).

Option #2: Conduct the Public Hearing to approve and adopt the FY 2027-2031 Blueprint Intergovernmental Agency Capital Improvement Program as presented and approve the FY 2027 Capital Improvement Program Budget Resolution (Resolution No. 2026-23).

Option #3: Direct Blueprint staff to make direct transfers to Leon County and the City of Tallahassee for annual allocations of funds for Blueprint 2020 projects being implemented by those jurisdictions.

Option #4: Approve the proposed FY 2026 budget amendment to adjust bond revenue to reflect the actual amount received and to adjust sales tax revenue to reflect the anticipated revenue received for Fiscal Year 2026.

EXECUTIVE SUMMARY:

The proposed balanced budget for the Blueprint Intergovernmental Agency is a continuation of the FY 2026 budget approved on September 11, 2025, with no significant changes and supports ongoing implementation of OEV projects and programs and 12 Blueprint Infrastructure projects that are anticipated to be in or beginning construction in FY 2027. This item incorporates all direction provided by the IA Board during the June 11, 2026, Budget Workshop (Attachment #3) and ratified by the IA Board at the regular meeting held later that same day.

In accordance with Section 189.016(3), Florida Statutes, the Blueprint Intergovernmental Agency (Agency), as a special district of the State of Florida, is required to adopt a budget by resolution each year. The first public hearing occurred during the September 10, 2026, CAC meeting, and this item requests that the IA Board conduct the second and final public hearing during the September 24, 2026, IA Board meeting. The IA Board's approval of the budget will appropriate funds necessary for the operation of the Blueprint Infrastructure and Office of Economic Vitality divisions of the Agency, as well as the FY 2027-2031 CIP.

The proposed FY 2027 Operating Budget and FY 2027-2031 CIP builds upon eleven years of prioritization and implementation processes approved previously by the IA Board, including the 2018 Implementation Plan, 2021 Blueprint Infrastructure Long-Term Implementation Plan, the Long-Term Economic Development Strategic Plan, the Targeted Industry Study, and extensive prior IA Board direction to expedite, finance, fund, and construct a large portfolio of major infrastructure projects and investments across the community.

The Agency has maintained its fiscal viability and was once again recognized with very high credit ratings in March 2o26 by Moody's Investor Service with an Aa2 credit rating and Fitch Ratings with AA credit rating. Consistent with trends experienced last year, the FY 2027 budget will continue to be constrained by modest growth of sales tax revenues, continued inflation, and rising real estate and construction prices.

The FY 2027 budget reflects a continued investment in the projects and programs supported by Leon County voters and implemented as directed by the IA Board. The proposed FY 2027 - 2031 CIP for Blueprint Infrastructure provides an estimated $78.33 million to support the local economy through direct expenditures over the next five fiscal years. The proposed five-year CIP focuses on projects activated by the IA Board and currently in progress. No new infrastructure projects are contemplated, and all planned funding through FY 2031 supports projects in various stages of planning, design, or construction. Projects underway include congestion reducing projects such as Northeast Gateway and Northeast Connector: Bannerman Road. Additionally, previously allocated funding supports continued progress on the Tharpe Street project, with design beginning in late 2026, as well as supporting the completion of three park projects in FY 2027 including Orange-Meridian Community Park, Market District Park, and Northeast Park. FY 2027 will also see continuation of key Southside projects, including construction of Capital Cascades Trail Segment 4 and Airport Gateway. Specifically for Airport Gateway, FY 2027 includes a significant investment by Blueprint and FDOT in improving resiliency through construction of the Munson Slough Bridge replacement on Springhill Road.

Funding for all existing OEV programs are included in the FY2027 budget, including the Air Service Incentive & Capacity Improvements program. As approved by the IA Board at the May 8, 2025, meeting, this program provides $670,000 annually for TLH air service development incentives and related air service capacity improvements. The program aims to strengthen the community's economic development by expanding and improving local air service. Earlier this year, TLH International Airport announced service provided by Breeze Airways, which was secured using the Air Service Incentive program. The FY 2027 proposed allocations also include the $250,000 annual allocation to the Affordable Housing Gap Finance Incentive Program. Funding for existing OEV projects and programs, including the Competitive Project fund and Future Opportunity Leveraging Fund, is included in the proposed FY 2027 allocations to ensure our community is positioned to leverage funding for future competitive projects (i.e., projects similar to Project Mango/Amazon). These future opportunities could be utilized to implement mid/long-term strategies in the updated strategic plan and additional leverage for highly competitive recruitment/expansion projects, matching grant dollars, and non-competitive projects that align with the newly adopted strategic plan.

Additionally, this item includes an amendment to the FY 2026 budget to adequately reflect actual and anticipated revenue for the year. The approved FY 2026 budget, adopted at the September 11, 2025, IA Board meeting, included a bond issue totaling $83 million in net revenue and a sales tax revenue forecast of $50.54 million. As approved by the IA Board at the March 12, 2026, the resolution authorizing the Series 2026 bond provided for up to $90 million in net revenue; the net amount received from the sale of the bonds totaled $89.54 million.

Sales tax revenue for FY 2026 is now expected to total $47.58 million due to the decrease in collections attributable primarily to the exemption of sales and use taxes on commercial leases passed by the Florida legislature; this is an anticipated reduction of

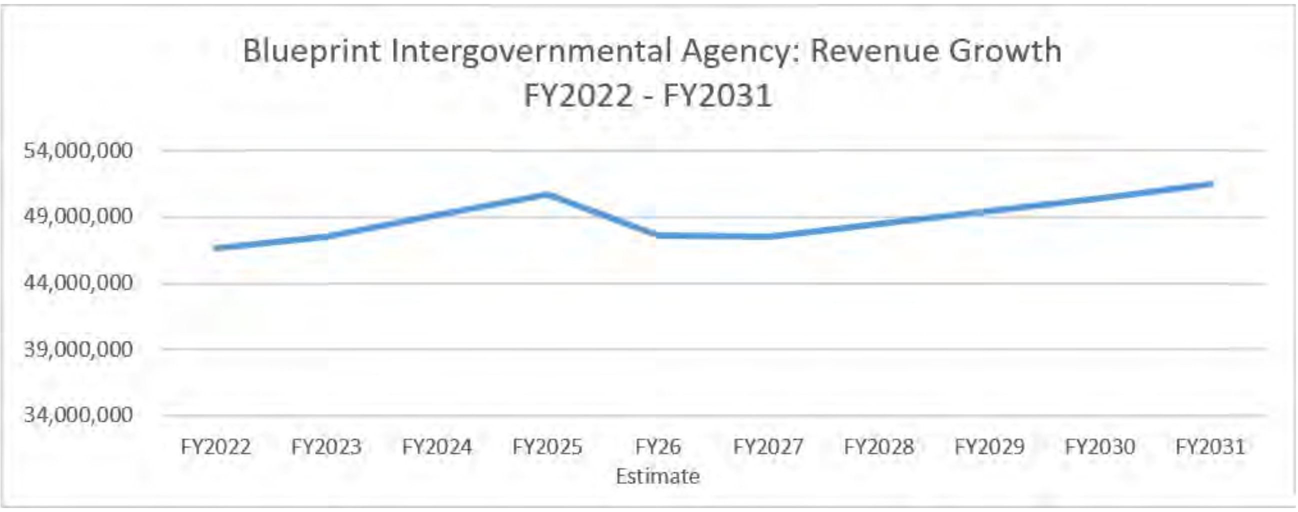
$2.96 million. Netting the increase in bond revenue with the reduction in sales tax revenue provides a total increase in budgeted revenue for FY 2026 of $3.58 million. As such, this item recommends IA Board approval for a FY 2026 budget amendment to adjust bond revenue to reflect the actual amount received and to adjust FY 2026 sales tax revenue to reflect the anticipated revenue received for FY 2026 (Option #4).

SUPPLEMENTAL INFORMATION

SALES TAX REVENUES

While sales tax revenues in FY 2022 and 2023 far surpassed revenues collected in prior years, sales tax revenue collections in FY 2024 and 2025 were more reflective of the incremental growth rates experienced pre-COVID. Beginning on October 1, 2025, the Florida Legislature exempted certain commercial leases from taxation; therefore, sales tax collections for FY 2026 were reduced by approximately 5% as compared to FY 2025. Consistent with trends experienced last year, the FY 2027 budget will be constrained by modest growth of sales tax revenues. Given these trends, the FY 2027 revenue projection reflects the sales tax revenue reductions experienced in FY 2026 and remaining four years of the CIP reflect a projected 2.0% growth from FY 2028 – 2031. Projections for modest growth of sales tax revenues are included by both the City of Tallahassee and Leon County in their respective budgets. Figure 1 charts the actual sales tax dollars collected for FY 2022 through 2025, the sales tax estimate for FY 2026, and the projection through FY 2031.

Figure 1. Actual and Projected Sales Tax Revenue Growth, 2022- 2031



BLUEPRINT INTERGOVERNMENTAL AGENCY SOURCES AND USES OF FUNDS

A summary of all sources and uses of funds for FY 2027 is summarized in Tables 1 and 2, below, with details for each category following the respective tables.

Sources of Funds

Table 1 lists the Agency's FY 2027 projected sources of funds, including estimated sales tax revenue and other state and local government funding, such as grants.

Table 1. Blueprint Intergovernmental Agency (Infrastructure and Office of Economic Vitality) Sources of Funds

Sources of Funds	FY 2027 Proposed
Sales Tax Revenue	48,012,405
City/County MWSBE Funding	923,506
Grants	1,000,000
Prior Year Revenue Received	281,988
Interest Earned in Prior Years	19,897,451
Total, Sources of Funds	70,115,350

The following provides a summary of the projected sources of funds for the Blueprint Intergovernmental Agency in FY 2027, as reflected in Table 1:

Sales Tax Revenues ($48.01 million): This is the Agency's primary funding source for both the Infrastructure and OEV programs. The FY 2027 sales tax revenue projections total $48.01 million, which reflects the budgetary impacts of the sales tax exemptions that became effective in FY 2026. This projection also takes into account modest growth of sales tax revenues.

City/County MWSBE Funding ($923,506): The joint MWSBE division of OEV is responsible for the implementation of Leon County, City of Tallahassee, and Blueprint supplier diversity initiatives. As such, funding for the operations of the MWSBE division is provided in equal amounts by Leon County, the City of Tallahassee, and OEV. The City of Tallahassee and Leon County each provide a budgeted $461,753 ($923,506 total). OEV also provides $461,753 for MWSBE, which is funded internally and not shown in Table 1, above. In light of the enactment of Florida Senate Bill 1134, which restricts local governments from implementing programs, policies, or activities that reference diversity, equity, and inclusion methodologies related to race and gender, a separate item is included on the agenda for the IA Board's regular meeting for IA Board consideration of a race- and gender-neutral Small Business Enterprise (SBE) program compliant with state law, which becomes effective January 1, 2027, that would replace the existing MWSBE program.

Grants ($1,000,000): This funding reflects an additional $1 million stormwater grant awarded to the Capital Cascades Trail Segment 4 project from the Florida Department of Environmental Protection. The grant recognizes the project's reduction of harmful nutrients present in urban stormwater runoff.

Prior Year Revenue Received ($281,988): Revenue received from the Tallahassee-Leon County Planning Department for the Market District Placemaking project.

Interest Earned ($19,897,451): Interest earned on Blueprint and OEV funds, including the FY 2022 and FY 2024 bonds, that is allocated to current Blueprint Infrastructure and OEV projects and programs.

Uses of Funds

Table 2 details the Agency's proposed uses of funds. Uses of funds are prioritized based on legal requirements, such as paying debt service on bonds and for the necessity of continuing the Agency's ongoing operations. The remaining funds are then available to be programmed into Blueprint Infrastructure and OEV's capital budgets of which the projects receiving annual allocations are funded in full, consistent with IA Board direction.

Table 2. Blueprint Intergovernmental Agency FY 2027 Uses of Funds

Uses of Funds	Infrastructure	OEV	Total
Capital Projects	31,346,379	4,589,214	35,935,593
Personnel & Operating	28,879,254	5,300,503	34,179,757
Total, Uses of Funds	60,225,633	9,889,717	70,115,350

The following provides a summary of the proposed uses of funds for the Blueprint Intergovernmental Agency in FY 2027, as reflected in Table 2:

Capital Projects ($35.94 million):

- Infrastructure Projects ($31.35 million): Capital project allocations totaling $31.35 million for FY 2027 implement the IA Board directed construction-ready strategy and continue key gateway and regional roadway projects, community enhancement, connectivity and quality of life improvements, completion of the remaining Blueprint 2000 projects, and continued funding for all annual allocations.
- OEV Projects ($4.59 million): The FY 2027 proposed allocation of $4.59 million to fund OEV's capital projects ensures that the funds committed to business expansion incentive agreements and economic development projects are fully invested.

Personnel and Operating ($34.18 million): The personnel services and operating budget category encompasses all internal staffing costs, including salaries and temporary wages, employee benefit programs, and debt service for both Infrastructure ($24,626,704) and OEV ($2,426,746). Operating costs include the operations and maintenance of an office for Blueprint Infrastructure and OEV staff. The proposed FY 2027 operating budget does not include any new positions, includes a proposed 4% cost of living adjustment consistent with those approved by the City and/or County, and accounts for projected health care cost increases. Debt service payments include repayment of bonds and loans previously authorized by the IA Board.

PROPOSED FY 2027 BUDGET – BLUEPRINT INFRASTRUCTURE

The Infrastructure division of the Blueprint Intergovernmental Agency delivers the community's infrastructure improvements in the priority order directed by the IA Board. Under that direction, the program addresses needs ranging from congestion reduction to multi-use corridors, park-like regional stormwater facilities for water-quality protection, passive recreation and wildlife-habitat preservation, Blueprint builds the infrastructure the community envisions. The proposed FY 2027 capital project allocations and FY 2027 – 2031 five-year CIP advance the completion of these infrastructure projects as prioritized by the IA Board.

Many Blueprint projects are currently under construction and in FY 2027, progress continues as additional projects or phases will begin construction, consistent with previous IA Board direction and authorization to procure these contracts.

Blueprint Infrastructure Proposed FY 2027 Capital Project Allocations

As the first funding year of the five-year CIP, the proposed FY 2027 allocation of $31.35 million, as summarized in Table 3 continues the implementation of the remaining Blueprint 2000 projects and of initiated Blueprint 2020 projects, consistent with previous IA Board direction and project prioritization to date.

Table 3. Blueprint Infrastructure FY 2027 Proposed Capital Project Allocations

Project	FY 2027
Annual Allocations	9,902,500
Blueprint 2000 Projects	3,000,000
Regional Mobility & Gateways	14,200,000
Community Enhancement, Connectivity, & Quality of Life	4,243,879
Total, All Projects	31,346,379

The proposed FY 2027 allocations to capital projects maintain project progress and reflect the prioritization and implementation processes approved previously by the IA Board as specified, below:

- Annual Allocations to City, County and Blueprint - $9,902,500
    - Sidewalks, Water Quality, Operating Costs for Blueprint Parks, Transit, Bike Routes, and Greenways.
    - Provides funding to implement the top priority Greenways Master Plan and Build the Bike Route projects, funded through the Annual Allocations and managed by Blueprint.
- Blueprint 2000 Projects - $3,000,000
    - Capital Cascades Trail Segment 4: This project, which will begin construction later this year, completes the over four-mile Capital Cascades Trail corridor. This funding reflects an additional $1 million stormwater grant awarded to the

project from FDEP, which recognizes the project's reduction of harmful nutrients present in urban stormwater runoff.
  - Magnolia Drive Trail: Funding will support completion of the final project north of Diamond to Apalachee Parkway, scheduled for construction in 2027.

- Regional Mobility & Gateways – $14,200,000
  Each Regional Mobility and Gateway project advances in FY 2027. Four of the five projects below require new FY 2027 allocations to initiate or continue construction. The Northwest Connector: Tharpe Street project moves into design in FY 2027 using funding the IA Board allocated in prior years.
  - Northeast Gateway – Welaunee Boulevard: Funding will support the completion of Welaunee Boulevard Phase 2 north of Interstate 10 to Roberts Road and the Welaunee Greenway, both scheduled to begin construction in FY 2027.
  - Airport Gateway: Funding will support the construction of Springhill Road improvements, including additional funding towards the leveraging opportunity with FDOT to replace and upgrade the Munson Slough Bridge, both scheduled to begin construction in FY 2027.
  - Northeast Corridor Connector – Bannerman Road: Funding will support the construction of the Bannerman Road widening to four lanes from Quail Common Drive to Preservation Road scheduled for construction in FY 2027.
  - North Monroe Gateway: Funding supports improvements along the North Monroe corridor and provides full funding towards Blueprint's $4.2 million local funding match for the federal Safe Streets and Roads for All (SS4A) grant received in late 2025.
  - Northwest Connector – Tharpe Street — advancing on previously allocated funding: Design work begins in late 2026, supported by the $9.5 million allocated to this project through FY 2026. The project is following the federal review process to preserve its eligibility for federal construction funding. This progress continues to position this project for maximum federal leveraging and grant opportunities, which are currently in progress. In May 2026, Blueprint submitted a Safe Streets and Roads for All (SS4A) application for $20.1 million to support design and construction for the first phase of the Tharpe Street improvements from Ocala Road to Mission Road; grant awardees have not yet been announced. Progress on this project is detailed further in the FY 2027 Work Plan section below.
- Community Enhancement, Connectivity, and Quality of Life - $4,243,879
  - Orange-Meridian Placemaking: Funding to complete the East Drainage Ditch improvements, including multimodal connectivity and improvements along Polk Street.
  - Market District Placemaking: Funding to support the completion of the pedestrian improvements and streetscaping components of the project.

Blueprint Infrastructure FY 2027 Work Plan

The proposed FY 2027 budget continues to focus on projects activated by the IA Board and currently in progress. No new projects are contemplated, and all planned funding through FY 2031 supports projects currently in progress in various stages of planning, design, or construction.

Progress continues on all Regional Mobility & Gateways projects; local roadway projects are being advanced by Blueprint and improvements on state-owned roadways are being coordinated though FDOT. Projects underway include congestion reducing projects such as Northeast Gateway and Northeast Connector: Bannerman Road. Project progress in FY 2027 also includes a significant investment by Blueprint and FDOT in improving resiliency through the Munson Bridge Replacement on Springhill Road as part of the next step of the Airport Gateway project. Collaboration continues with Leon County and the CRTPA as these agencies work on the design for the North Monroe Gateway improvements.

The Northwest Connector: Tharpe Street project reached a significant milestone with the completion of the Project Development and Environmental (PD&E) study, the federally required evaluation of a project's design alternatives and its effects on the surrounding environment. The technical findings of the report were presented at a public meeting on February 12, 2026. This meeting was an open-house-style public meeting that consisted of site plans illustrating the planned improvements to the West Tharpe Street corridor as well as a timeline of the project. Over 100 community members were in attendance. A summary of the PD&E findings and the final report are publicly available on the Northwest Connector Corridor: Tharpe Street – Blueprint Intergovernmental Agency project website. With the completion of this PD&E report, design work will begin at the end of this year (2026) on the Tharpe Street project. This progress continues to position this project for maximum federal leveraging and grant opportunities, which are currently in progress. In May 2026, Blueprint submitted a SS4A application for $20.1 million to support design and construction for the first phase of the Tharpe Street improvements from Ocala Road to Mission Road.

Projects in Community Enhancement, Connectivity, and Quality of Life continue to move forward with funding previously allocated. Three park projects will be completed over the next year including Orange-Meridian Community Park, Market District Park, and Northeast Park. Combined, these projects will provide over 60 acres of new recreational space including playgrounds and sports fields in southern, central, and northern Leon County. Progress also continues on the Monroe-Adams Corridor Placemaking project; with the recent completion of electric utility undergrounding on four of the five blocks and streetscaping and roadway reconstruction work beginning on the five cross streets in FY 2027. Regarding the Fairgrounds Beautification and Improvements project, the Board of County Commissioners is continuing lease renegotiations with the North Florida Fair Association to implement the IA Board approved Master Plan.

Lastly, the two remaining Blueprint 2000 projects will be in construction in FY 2027. The last phases of two projects central to the Blueprint 2000 program – the Capital Cascades

Trail system and the Magnolia Drive Trail, will begin construction on their respective final phases. Magnolia Drive Phase 3 will complete the project improvements north of Diamond Street to Apalachee Parkway. Capital Cascades Segment 4 completes the connection to Lake Henrietta.

Many Blueprint projects are currently under construction and in FY 2027, and progress continues as additional projects or phases will begin construction, as detailed in Table 4 on the following page.

State and Federal Funding for Blueprint Infrastructure Projects

In addition to local surtax revenues, many projects included on the Blueprint project list continue to receive funding from Florida Department of Transportation (FDOT) or federal agencies, further increasing the impact of local investments. Over $16 million was awarded for the North Monroe Safety Project from USDOT. Approximately $321 million in FDOT funding has been, or is planned to be, invested in the following Blueprint projects and activities, which continue progress in planning, design, and construction through FY 2031:

- Capital Circle Southwest (Orange Avenue to Crawfordville Road): Construction
- North Monroe Gateway Sidewalk Improvements: Construction
- North Monroe Gateway Safety Project: Design
- Orange Avenue/Airport Gateway (Monroe to South Lake Bradford Road): Design
- Springhill Road/Airport Gateway (Munson Bridge Replacement): Design and Construction
- Thomasville Road/Midtown Placemaking (Monroe Street to Betton Road) Resurfacing and Access Management: Construction

Table 4. Blueprint Infrastructure Actual and Planned Project Construction Activity for FY 2026 and FY 2027

FY 2026: Projects In Construction and Planned to be in Construction
Airport Gateway (continued construction)
Animal Service Center *(completed in FY 2026)*
Bike Route System: Southwest Area Connector (initiate construction)
Capital Cascades Trail Segment 4 (initiate construction)
Capital Circle Southwest (continued construction)
Debbie Lightsey Nature Park - Mountain Bike Trail *(completed in FY 2026)*
Greenways: Tram Road Trail *(completed in FY 2026)*
Lake Lafayette & St. Marks Regional Park: Upper Lake Lafayette Trail *(completed in FY 2026)*
Magnolia Drive Trail – Phase 2 *(completed in FY 2026)*
Market District Park (continued construction)
Monroe-Adams Placemaking (continued construction)
North Monroe Gateway - Medians (*completed in FY 2026*)
Northeast Corridor Connector: Bannerman Road (initiate construction for Bull Headley Road turn lane)
Northeast Gateway: Welaunee Boulevard (continued construction)
Northeast Park (continued construction)
Orange-Meridian Placemaking (continued construction)
FY 2027: Projects In Construction and Planned to be in Construction
Airport Gateway (continued construction)
Bike Route System: Downtown-University Protected Bike Lanes (initiate construction)
Capital Cascades Trail Segment 4 (continued construction)
Capital Circle Southwest (continued construction)
Greenways: Lake Jackson Greenway - Phase 2 (initiate construction)
Magnolia Drive Trail – Phase 3 (initiate construction)
Market District Park (continued) and Placemaking (initiate construction)
Monroe-Adams Placemaking (continued construction)
Northeast Corridor Connector: Bannerman Road (continued construction)
Northeast Gateway: Welaunee Boulevard (continued construction)
Northeast Park (continued construction)
Orange-Meridian Placemaking (continued construction)

Blueprint Infrastructure Proposed Five-Year Capital Improvement Program

Each fiscal year, pursuant to Blueprint policy, Blueprint is required to adopt a five-year capital improvement program. As detailed above, the first year of the five-year plan maintains progress on Blueprint Infrastructure projects and provides $31.35 million to fund various projects in the work plan.

Capital project allocations totaling $78.33 million for FY 2027 – 2031, detailed in Table 5 and included as Attachment #2, implement the IA Board directed construction-ready strategy and continue key mobility and quality of life projects over the next five years. The five-year plan reflects $49.5 million for annual allocation projects, which includes $41.81 million to the City and County for improvements to sidewalks, transit, and water quality and park maintenance over the next five years.

The proposed Five-Year CIP continues to focus on projects activated by the IA Board and currently in progress. No new projects are contemplated, and all planned funding through FY 2031 supports projects currently in progress in various stages of planning, design, or construction. Attachment #4 includes a line-item summary of the project cost estimates.

Table 5. Blueprint Infrastructure FY 2027 – 2031 Proposed Capital Improvement Program

BLUEPRINT INFRASTRUCTURE Capital Improvement Program Allocations						
Project	FY2027	FY2028	FY2029	FY2030	FY2031	Total
Annual Allocations	9,902,500	9,902,500	9,902,500	9,902,500	9,902,500	49,512,500
Blueprint 2000 Projects	3,000,000	-	-	-	-	3,000,000
Regional Mobility & Gateways	14,200,000	-	-	-	-	14,200,000
Community Enhancement, Connectivity, & Quality of Life	4,243,879	1,846,606	1,844,074	1,844,919	1,842,329	11,621,807
Total, All Projects	31,346,379	11,749,106	11,746,574	11,747,419	11,744,829	78,334,307

Blueprint Infrastructure Proposed Operating Budget

The Operating Budget effectuates the implementation of the Infrastructure program of work and will continue the implementation of Blueprint community projects. Throughout FY 2027, the Blueprint Infrastructure Program will continue to implement projects consistent with prior IA Board direction. This entails advancing the remaining Blueprint 2000 program projects (Capital Cascades Trail Segment 4 and Magnolia Drive Trail) and implementation of Blueprint 2020 projects. The Operating Budget funds personnel costs, including a cost-of-living adjustment of 4% (in line with the City and County), as well as debt service and capital projects transfers. The FY 2027 proposed operating budget is detailed in Table 6.

Table 6. Blueprint Infrastructure Proposed FY 2027 Operating Budget

Uses of Funds	FY2027 Proposed
Debt Service	24,626,704
Personnel Services	3,494,600
Operating Expenses	686,908
Other Services/Charges	75,000
Allocated Costs	215,782
Administrative Allocations	(219,740)
Capital Projects Transfer	31,346,379
Total, Uses of Funds	60,225,633

The Administrative Allocations category in Table 6, above, includes the costs of Agency support staff, including legal, accounting, and administrative staff, that are shared between Infrastructure and OEV. These shared staff are administratively placed in Infrastructure, thus a negative expense (incoming funds) is budgeted in Infrastructure, and the same amount is an expense under OEV indicating that they are transferring that amount to Infrastructure for OEV's portion of the shared staff.

PROPOSED FY 2027 BUDGET – OFFICE OF ECONOMIC VITALITY

Office of Economic Vitality Proposed Capital Improvement Plan

The FY 2027 proposed allocation to fund OEV's capital projects ensures that the funds committed to business expansion incentive agreements and economic development projects are fully invested. OEV has proposed funding the Competitive Project fund to ensure that our community is positioned to leverage funding for future competitive projects (i.e., projects similar to Project Mango/Amazon). These future opportunities could be utilized to implement mid/long-term strategies in the updated strategic plan and additional leverage for highly competitive recruitment/expansion projects, matching grant dollars, and non-competitive projects that align with the newly adopted strategic plan.

Table 7. Office of Economic Vitality FY 2027 – 2031 Proposed Capital Improvement Program

Office of Economic Vitality Capital Improvement Program Allocations						
Project	FY2027	FY2028	FY2029	FY2030	FY2031	Total
Capital Projects Allocations	705,000	705,000	705,000	705,000	705,000	3,525,000
Incentives, Grants and Programs	3,541,003	2,062,827	2,171,041	2,285,725	2,399,401	12,459,997
Business2Business Engagement Actions	303,211	312,500	312,500	312,500	312,500	1,553,211
Economic Vitality Studies	40,000	40,000	40,000	40,000	40,000	200,000
Total, All Projects	4,589,214	3,120,327	3,228,541	3,343,225	3,456,901	17,738,208

Office of Economic Vitality Proposed Operating Budget

The proposed OEV FY 2027 operating budget continues the IA Board's prior direction for the OEV Business Development and MWSBE units. The personnel services budget category encompasses all internal OEV operating and staffing costs, including salaries and temporary wages and employee benefit programs. The Operating Budget funds personnel costs, including a cost-of-living adjustment of 4% (in line with the City and County), as well as debt service and capital projects transfers. The FY 2027 proposed operating budget is detailed in Table 8:

Table 8. Office of Economic Vitality Proposed Operating Budget

Uses of Funds	FY2027 Proposed
Debt Service	2,426,746
Personnel Services	2,040,790
Operating Expenses	439,990
Other Services/Charges	50,000
Allocated Costs	123,237
Administrative Allocations	219,740
Capital Projects Transfer	4,589,214
Total, Uses of Funds	9,889,717

FISCAL YEAR 2026 PROPOSED BUDGET AMENDMENT TO RECONCILE REVENUE

Two of the Agency's FY 2026 revenue lines are closing the year at amounts different from those the IA Board budgeted in September 2025: bond proceeds came in above the budgeted amount, and sales tax collections came in below it. This section explains both variances, identifies how each affects the Agency's two programs, and requests a FY 2026 budget amendment to align the budget with the amounts actually received.

Bond proceeds exceeded the budgeted amount by $6.54 million. The FY 2026 budget for the Agency was approved during the September 11, 2025, IA Board meeting and included plans for a bond issuance netting $83 million in revenue. The resolution authorizing the issuance of the bonds was approved during the March 12, 2026, IA Board meeting, and the authorization allowed bond funding in an amount up to $90 million. The net proceeds of the bond sale, meaning the amount remaining after the costs of issuing the bonds, totaled $89.54 million. The sale produced $6.54 million more than the FY 2026 budget anticipated.

Sales tax collections fell $2.96 million below the budgeted amount. During the 2025 session, the Florida Legislature passed House Bill (HB) 7031, which amended Section 212.031, Florida Statutes, to exempt commercial real property leases from discretionary sales surtaxes beginning October 1, 2025. In practical terms, the one-cent surtax that funds the Agency no longer applies to commercial rent. Because the exemption took effect on the first day of FY 2026, it reduced collections for the Agency, and for other local governments across the state, for the full fiscal year. The FY 2026 budget anticipated $50.54 million in sales tax revenue; actual collections for the year are now projected at approximately $47.58 million, a reduction of $2.96 million. This exemption is permanent, and the FY 2027 proposed budget and future year projections already account for it.

The two variances affect the Agency's programs differently. Bond proceeds fund Blueprint Infrastructure projects only; the Office of Economic Vitality (OEV) receives no share of bond proceeds. Sales tax revenue, by contrast, is shared by both programs under the allocation approved by the IA Board. The Agency receives 78% of the total sales tax (Infrastructure 66% and OEV 12%). The Agency FY 2026 sales tax reduction is split using the Infrastructure and OEV proportional share. Blueprint Infrastructure therefore receives the entire $6.54 million bond surplus and absorbs $2,508,762 (85%) of the sales tax reduction, resulting in a net increase of $4,031,238 to the program. OEV is affected by the sales tax reduction alone, which lowers its share by $455,420 (15%). Together, the bond and sales tax adjustments produce a net revenue increase of $3.58 million for the Agency in FY 2026. Staff will bring the specific allocation of these funds back to the IA Board for approval at a future meeting.

The proposed amendment places the Infrastructure increase in the Regional Mobility and Gateways master project pending that future Board action. Because the increase to Blueprint Infrastructure results entirely from bond proceeds, the funds carry spending deadlines that do not apply to sales tax revenue: bond funds must be encumbered, meaning committed under contract, within three years, and expended within five years. Placing the funding in the Regional Mobility and Gateways master project keeps it within the projects eligible to meet those timeframes: Northeast Gateway: Welaunee Boulevard, Airport Gateway, Northeast Corridor Connector: Bannerman Road, and Northwest Connector Corridor: Tharpe Street, including use as matching funds for leveraging opportunities on one of these projects. Staff will return to the IA Board with a recommended allocation among these projects, and the Board will direct the specific use of the funds before any are committed.

CONCLUSION:

The FY 2027 Operating Budget and FY 2027 – 2031 CIP presented herein fund the programs and projects prioritized by the IA Board for Infrastructure and OEV. That progress continues under the same conditions the Agency has managed in prior years: modest growth in sales tax revenues, continued inflation, and rising real estate and construction prices.

The proposed FY 2027 – 2031 CIP for Blueprint Infrastructure continues the implementation of community projects across Leon County, including: regional mobility, gateway, and placemaking projects, and provides $41.81 million to the City and County for improvements to sidewalks, transit, and water quality and park maintenance over the next five years.

In total, the Infrastructure program will provide an estimated $78.33 million to support the local economy through direct expenditures over the next five fiscal years and provides funding for all six projects funded through annual allocations, including sidewalks, water quality, parks operations, greenways, bike route, and transit, as well as North Monroe Gateway, Airport Gateway, Orange-Meridian Placemaking, Market District Placemaking, Northeast Connector: Bannerman Road, and the Northeast Gateway: Welaunee Boulevard projects. The Northwest Connector: Tharpe Street project will move into design by the end of 2026 using funding the IA Board allocated in prior years.

Over the next five years, OEV will be positioned to provide an estimated $17.74 million to support local businesses, entrepreneurs, targeted industries, and local workforce development. The proposed FY 2027 – 2031 budget includes funding for all existing Office of Economic Vitality programs and projects, including funding for the Competitive Project Fund and the Future Opportunity Leveraging Fund.

Action by CAC: The CAC held the first Public Hearing for the FY 2027 Blueprint Intergovernmental Agency Operating Budget and FY 2027-2031 Capital Improvement Plan on September 10, 2026.

OPTIONS:

Option #1: Conduct the Public Hearing and adopt the FY 2027 Blueprint Intergovernmental Agency Operating Budget as presented and approve the FY 2027 Operating Budget Resolution (Resolution No. 2026-22).

Option #2: Conduct the Public Hearing to approve and adopt the FY 2027-2031 Blueprint Intergovernmental Agency Capital Improvement Program as presented and approve the FY 2027 Capital Improvement Program Budget Resolution (Resolution No. 2026-23).

Option #3: Direct Blueprint staff to make direct transfers to Leon County and the City of Tallahassee for annual allocations of funds for Blueprint 2020 projects being implemented by those jurisdictions.

Option #4: Approve the proposed FY 2026 budget amendment to adjust bond revenue to reflect the actual amount received and to adjust sales tax revenue to reflect the anticipated revenue received for Fiscal Year 2026.

Option #5: IA Board Direction.

RECOMMENDED ACTIONS:

Option #1: Conduct the Public Hearing and adopt the FY 2027 Blueprint Intergovernmental Agency Operating Budget as presented and approve the FY 2027 Operating Budget Resolution (Resolution No. 2026-22).

Option #2: Conduct the Public Hearing to approve and adopt the FY 2027-2031 Blueprint Intergovernmental Agency Capital Improvement Program as presented and approve the FY 2027 Capital Improvement Program Budget Resolution (Resolution No. 2026-23).

Option #3: Direct Blueprint staff to make direct transfers to Leon County and the City of Tallahassee for annual allocations of funds for Blueprint 2020 projects being implemented by those jurisdictions.

Option #4: Approve the proposed FY 2026 budget amendment to adjust bond revenue to reflect the actual amount received and to adjust sales tax revenue to reflect the anticipated revenue received for Fiscal Year 2026.

Attachments:

1. Proposed FY 2027 Operating Budget Resolution
2. Proposed FY 2027 – 2031 Capital Improvement Program Budget Resolution
3. IA Board Agenda Item – June 11, 2026, Budget Workshop (Linked)
   https://go.boarddocs.com/fla/talgov/Board.nsf/goto?open&id=DG9LNF575DFA
4. Summary of Project Cost Estimates

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Blueprint Intergovernmental Agency
FY 2027 Operating Budget
RESOLUTION NO. 2026-22

WHEREAS, the Blueprint Intergovernmental Agency's Budget Policy 102.06.B.2., and Section 189.016(3), Florida Statues, requires the Board of Directors ("Board") to adopt an annual operating budget and appropriate funding for the upcoming year by resolution; and

WHEREAS, the Board has acknowledged the receipt of sales tax revenue and other sources of revenue to fund operating expenses for the Fiscal Year 2027 beginning October 1, 2026, and ending September 30, 2027.

NOW, THEREFORE, BE IT RESOLVED, that the Leon County – City of Tallahassee Blueprint Intergovernmental Agency Board, hereby adopts the Operating Budget for Fiscal Year 2027 as set forth in "Exhibit A", which is attached hereto and incorporated herein, and authorizes the carryover of any fund balance, including all operating fund balances, requisitions, and encumbrances from prior years which will automatically be re-appropriated.

Adopted this 24th day of September 2026.

Leon County-City of Tallahassee
Blueprint Intergovernmental Agency

By: ___________________________
Commissioner Curtis Richardson
Chair, Board of Directors

Attest:

By: ___________________________
James O. Cooke, Treasurer-Clerk
City of Tallahassee

Approved as to Form:

By: ___________________________
Susan Dawson, Esq.
Blueprint Attorney

EXHIBIT A FY2027 Operating Budget, Blueprint Infrastructure and Office of Economic Vitality	Infrastructure	Economic Vitality	Agency Total
Sources of Funds			
312600 Sales Tax	40,625,881	7,386,524	48,012,405
337411 City OEV Funding	-	461,753	461,753
337412 County OEV Funding	-	461,753	461,753
369940 Transfer From Unappropriated Fund Balance	18,599,752	1,579,687	20,179,439
334494 FDOT Grants - Transportation	1,000,000	-	1,000,000
Grand Total	60,225,633	9,889,717	70,115,350
Uses of Funds			
Personnel Expenses			
511000 Salaries	2,066,270	1,227,050	3,293,320
511300 Salary Enhancements	91,750	54,430	146,180
511500 Temporary Wages	227,130	141,000	368,130
512400 Other Salary Items	19,880	4,680	24,560
515000 Pension- Current	429,790	235,530	665,320
515100 Pension- MAP	147,480	75,390	222,870
515500 Social Security	14,770	18,030	32,800
515600 Mandatory Medicare	34,860	20,190	55,050
516000 Health Benefits	395,020	236,160	631,180
516001 Health Benefits-Retirees	25,000	15,450	40,450
516100 Flex Benefits	42,650	12,880	55,530
Total, Personnel Expenses	**3,494,600**	**2,040,790**	**5,535,390**
Operating & Other Expenses			
521010 Advertising	5,000	27,500	32,500
521030 Reproduction	24,000	7,500	31,500
521100 Equipment Repairs	15,000	-	15,000
521160 Legal Services	75,000	-	75,000
521180 Unclassified Contractual Srvcs	46,560	36,000	82,560
522080 Telephone	15,000	12,000	27,000
523020 Food	2,750	30,000	32,750
523030 Gasoline	10,000	5,000	15,000
523050 Postage	1,000	-	1,000
523060 Office Supplies	15,000	16,500	31,500
523080 Unclassified Supplies	19,500	10,000	29,500
523100 Vehicle- Non-Garage	6,500	-	6,500
524010 Travel & Training	53,900	57,700	111,600
524020 Journals & Books	6,500	-	6,500
524040 Certificates & Licenses	8,998	4,700	13,698
Membershp/Certificates/License		3,000	3,000
524050 Rent Expense- Building & Offic	174,200	119,000	293,200
524070 Rent Expense- Machines	5,000	15,000	20,000
540040 Liability Insurance Premium	75,000	50,000	125,000
521015 Financial/Investment Mgmt Svc	83,000		83,000
521025 Live Performance Services	15,000	7,500	22,500
521035 Unclassified Professional Fees	-	35,000	35,000
521191 Computer Software	70,000	33,590	103,590
523065 Computer Equipment	20,000	10,000	30,000
523090 Furniture & Equipment	15,000	10,000	25,000
Total, Operating & Other Expenses	**761,908**	**489,990**	**1,251,898**
Allocated Costs			
560010 Human Resource Expense	15,420	16,095	31,515
560020 Accounting Expense	38,522	17,785	56,307
560030 Purchasing Expense	9,622	5,316	14,938
560040 Information Systems Expense	42,379	45,879	88,258
560070 Revenue Collection	117	27	144
560120 Indirect Costs	101,192	32,520	133,712
560150 Diversity and Inclusion Expens	8,530	5,615	14,145
Total, Allocated Costs	**215,782**	**123,237**	**339,019**
Administrative Allocation			
611100 Admin Allocation Transfer	(219,740)	219,740	-
Total, Administrative Allocation	**(219,740)**	**219,740**	**-**
Total Operating Budget Before Transfers	**4,252,550**	**2,873,757**	**7,126,307**
Transfers to Other Funds			
611300 Debt Service Transfer	24,626,704	2,426,746	27,053,450
612400 Inter-Fund Ops Transfer	31,346,379	4,589,214	35,935,593
Total, Transfers to Other Funds	**55,973,083**	**7,015,960**	**62,989,043**
Total, Uses of Funds	**60,225,633**	**9,889,717**	**70,115,350**

Blueprint Intergovernmental Agency
FY 2027 Capital Budget
RESOLUTION NO. 2026-23

WHEREAS, the Blueprint Intergovernmental Agency's Budget Policy 102.06.B.2, and Section 189.016(3), Florida Statues, requires the Board of Directors ("Board") to adopt an annual capital budget and appropriate funding for the upcoming year by resolution; and

WHEREAS, the Board has acknowledged the receipt of bond proceeds, sales tax revenue and other sources of revenue to fund capital expenses for the Fiscal Year 2027 beginning October 1, 2026, and ending September 30, 2027; and

WHEREAS, the Board hereby approves the five-year Capital Improvement Program for Fiscal Year 2027 through Fiscal Year 2031, in accordance with Budget Policy 102.07.3.

NOW, THEREFORE, BE IT RESOLVED, that the Leon County – City of Tallahassee Blueprint Intergovernmental Agency Board hereby adopts the Capital Budget for Fiscal Year 2027 as set forth in "Exhibit A," which is attached hereto and incorporated herein, and authorizes the carryover of any capital fund balance, including all capital fund balances, requisitions, and encumbrances from prior years which will automatically be re-appropriated.

Adopted this 24th day of September 2026.

Leon County-City of Tallahassee
Blueprint Intergovernmental Agency

By: ___________________________
Commissioner Curtis Richardson
Chair, Board of Directors

Attest:

By: ___________________________
James O. Cooke, Treasurer-Clerk
City of Tallahassee

Approved as to Form:

By: ___________________________
Susan Dawson, Esq.
Blueprint Attorney

EXHIBIT A BLUEPRINT INTERGOVERNMENTAL AGENCY FY2027 - FY2031 CAPITAL BUDGET						
BLUEPRINT INFRASTRUCTURE	**FY2027**	**FY2028**	**FY2029**	**FY2030**	**FY2031**	**Total**
Blueprint 2000 Program	3,000,000	-	-	-	-	3,000,000
Annual Allocations	9,902,500	9,902,500	9,902,500	9,902,500	9,902,500	49,512,500
Regional Mobility and Gateway Projects	14,200,000	-	-	-	-	14,200,000
CCQ Projects	4,243,879	1,846,606	1,844,074	1,844,919	1,842,329	11,621,807
Reserve Fund, Blueprint Infrastructure	-	-	-	-	-	-
Total, Blueprint Infrastructure Capital Allocations	**31,346,379**	**11,749,106**	**11,746,574**	**11,747,419**	**11,744,829**	**78,334,307**
OFFICE OF ECONOMIC VITALITY	**FY2027**	**FY2028**	**FY2029**	**FY2030**	**FY2031**	**Total**
Capital Projects Allocations	705,000	705,000	705,000	705,000	705,000	3,525,000
Incentives, Grants and Programs	3,541,003	2,062,827	2,171,041	2,285,725	2,399,401	12,459,997
Business2Business Engagement Actions	303,211	312,500	312,500	312,500	312,500	1,553,211
Economic Vitality Studies	40,000	40,000	40,000	40,000	40,000	200,000
Total, Office of Economic Vitality Capital Allocations	**4,589,214**	**3,120,327**	**3,228,541**	**3,343,225**	**3,456,901**	**17,738,208**
Total, Capital Project Transfers	**35,935,593**	**14,869,433**	**14,975,115**	**15,090,644**	**15,201,730**	**96,072,515**

	Line Item Cost Estimate Summary FY2027 - FY2040*	Total Projected Funding Needs	Funding Allocated Through 2026	Projected Funding Needs (FY2027 - FY2040)*
Blueprint 2000 Program				**3,000,000**
	Capital Cascades Trail Segment 4	21,000,000	20,000,000	1,000,000
	Magnolia Drive Trail and Subprojects	25,556,734	23,556,734	2,000,000
Blueprint 2020 Program				**362,672,289**
	Annual Allocations			**130,308,125**
	Blueprint: Greenways Master Plan	15,800,000	6,232,500	9,567,500
	Blueprint: Bike Route System	15,000,000	5,062,500	9,937,500
	City of Tallahassee: StarMetro Enhancements	12,250,000	4,134,375	8,115,625
	City of Tallahassee: Water Quality and Stormwater Improvements	42,500,000	14,343,750	28,156,250
	City of Tallahassee: Sidewalks Improvements	25,000,000	8,437,500	16,562,500
	City of Tallahassee: Operating Costs of Blueprint Funded Parks	10,000,000	3,375,000	6,625,000
	Leon County: Water Quality and Stormwater Improvements	42,500,000	14,343,750	28,156,250
	Leon County: Sidewalks Improvements	25,000,000	8,437,500	16,562,500
	Leon County: Operating Costs of Blueprint Funded Parks	10,000,000	3,375,000	6,625,000
BPIA Priority	**Regional Mobility and Gateway Projects**			**194,111,806**
1	Northeast Gateway: Welaunee Boulevard	202,325,000	182,691,181	19,633,819
2	Airport Gateway	138,600,000	71,722,013	66,877,987
3	Northeast Corridor Connector: Bannerman Road	164,700,000	109,900,000	54,800,000
4	Northwest Connector: Tharpe Street**	62,300,000	9,500,000	52,800,000
	Blueprint Projects on State Roadways* **			**200,000**
	Capital Circle Southwest Orange to Crawfordville	500,000	500,000	-
	North Monroe Gateway	4,768,098	4,568,098	200,000
	Southside Gateway: Woodville Highway	74,900,000	-	-
	Orange Avenue: Adams to Springhill	118,700,000	350,000	-
	Westside Student Gateway: Pensacola Street	49,500,000	-	-
	Lake Lafayette and St. Marks Regional Park	15,800,000	-	-
	Midtown Placemaking****	29,028,534	749,159	-
BPIA Priority	**CCQ Projects**			**38,052,358**
1	Orange Avenue/Meridian Placemaking	12,709,611	8,709,611	4,000,000
2	Market District Placemaking	17,009,686	16,727,698	281,988
3	Monroe-Adams Corridor Placemaking	8,532,961	8,532,961	-
4	Fairgrounds Beautification and Improvement	30,000,000	10,000,000	20,000,000
5	Northeast Park	12,000,000	12,000,000	-
6	College Avenue Placemaking	9,236,351	-	9,236,351
7	Florida A&M Entry Points	1,979,218	-	1,979,218
8	Alternative Sewer Solutions	3,054,801	500,000	2,554,801
	Total	**1,200,250,994**	**547,749,330**	**365,672,289**

*Reflects current estimated project costs through FY 2040. Sales tax revenues will be collected and leveraging opportunities pursued through FY 2040 to address these funding needs.
**The Northwest Connector: Tharpe Street project is following the federal process to ensure eligibility for federal funds.
***Blueprint projects on state roadways are anticipated to be funded through FDOT. Blueprint may fund items that are above and beyond those funded by FDOT.
****The Midtown Placemaking project is currently being overseen by FDOT as the improvements along Thomasville Road from Monroe Street to Seventh Avenue are being redesigned to implement the planned resurfacing only project.