

THE CITY OF FOSTER CITY



LSI

SOLUTION DEVELOPMENT

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1. Cover Letter

City of Foster City
City Manager's Office
Attention: Jennifer Phan, Principal Management Analyst
610 Foster City Boulevard
Foster City, CA 94404

June 26, 2021

Logistics Specialties, Inc. (LSI)
Attention: Dawn Wivell
1530 N. Layton Hills Parkway, Suite 201
Layton, UT 84040

Dear Ms. Phan:

Thank you for providing Logistics Specialties, Inc. (LSI) with the opportunity to submit a proposal on behalf of Foster City, California in its pursuit to find a qualified consulting firm with strong expertise in economic development. This letter and additional supporting documents will demonstrate LSI's strong history and understanding of economic development strategies and how such expertise will benefit and support Foster City's future goals and plans.

Logistic Specialties, Inc. (LSI) has a half-century history of working with businesses, from the large OEMs to the SMEs, providing business development services that range from opportunity development to capture strategy to government procurement to proposal writing and more. In addition, LSI has a proud history of working in all aspects of economic development and at all levels. Our background ranges from program development with the US Small Business Administration to industry and innovation clusters to export consortia to workforce development, State and Local economic development initiatives, to Native American Business Development and Innovation projects, to simply helping economic developers to bolster resources. We have worked all over the United States and the world.

LSI's clients come in all forms and sizes, from major defense contractors to emerging small businesses involved in both product and service industries. Client portfolios range from component manufacturing to major technology systems in aviation, aerospace, defense, information technology, robotics, manufacturing, government services, logistics, construction, agriculture, etc. With over 1,900 consultants and 80 locations worldwide, LSI's reach is global, but we pride ourselves on the fact that we understand the intimate value of communities and their direct correlation to quality of life.

Foster City is a diverse and unique city with a population that continues to grow and expand. Such growth necessitates a strategic action plan for future economic development. Foster City has already established a strong Economic Development

Strategic Work Plan and is forward-thinking in its approach and mission. Partnering with LSI as the consulting agency for future economic development plans in Foster City will produce progressive action and development for the city and its residents. Included in the attached proposal is an overview of LSI's previous history with economic development projects and the success we have achieved as an organization. The proposal will also provide information on some of the current economic development projects LSI has recently been awarded and will outline the current economic development action plans in place.

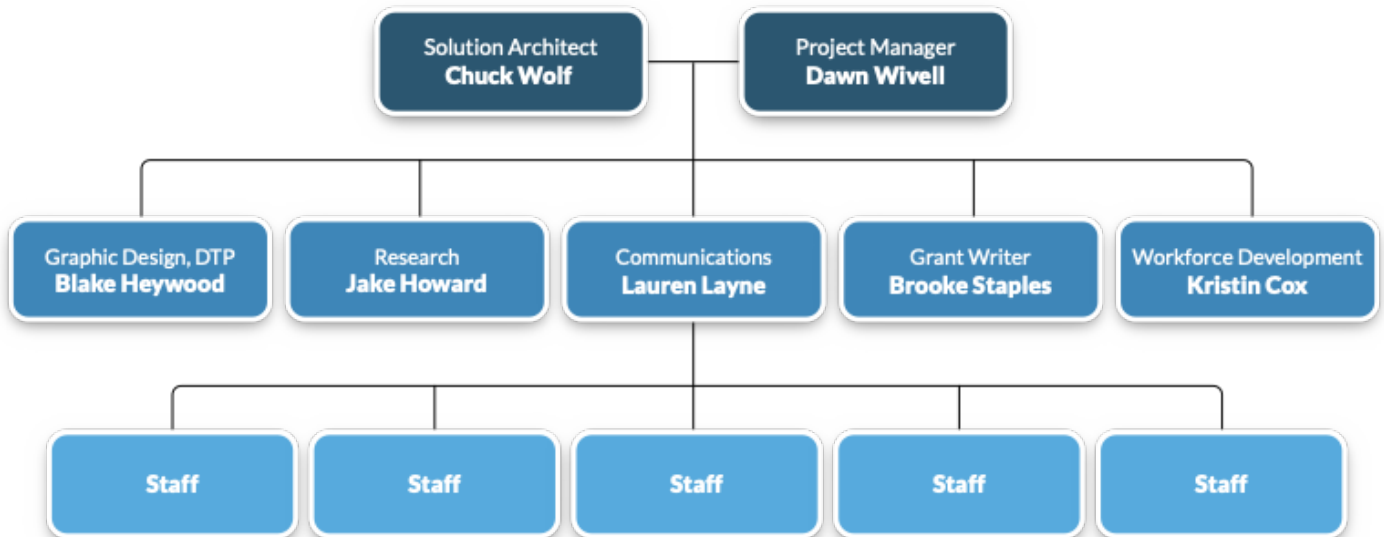
Thank you for providing LSI with the opportunity to submit this proposal. If you have any additional questions or concerns, please feel free to contact Dawn Wivell at (603) 205-1001 or dwivell@lsiwins.com

Sincerely,



Dawn Wivell
Vice President of Business Development

2. Project Team



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801.776.0062 - www.lsiwins.com



Dawn M. Wivell

Biography 2020

Dawn Wivell joined LSI, headquartered in Utah, in December 2019. Dawn currently serves as Vice President of Business Development where she manages the client base in the Northeast, works special projects around the world, serves as lead on the national State economic development strategy, and for the international practice area. In 2011, Dawn founded Firebrand International LLC, a New Hampshire based firm focused on developing and implementing international business strategies for U.S. and foreign businesses, economic development agencies and trade associations, worldwide. In addition to working in a wide range of industries on business strategy, development and capture, Dawn works on ecosystem development, consortium development and management, industry-specific strategic development, economic development strategies and place branding/marketing.

Dawn previously spent 21 years as the International Trade Director for the State of New Hampshire, where she was responsible for developing and implementing all state international trade related programs, strategies and activities. Dawn established the export development department for New Hampshire, creating the NH International Trade Resource Center, which was recognized as a national model. Together with her team, she worked with over 2,000 companies, organized trade missions to 30 countries, hosted hundreds of foreign delegations, and developed award-winning marketing campaigns and strategies.

Ms. Wivell's previous positions include COO for an Irish start-up tech company, managing an oil drilling operation in Italy, working as a senior trade analyst for the Italian Trade Commission, director of an international trading company, and sales administration for the oldest company in the U.S. Originally from California, Dawn has also lived in Texas, Scotland and Italy. She is fluent in Italian, and competent in Spanish and French.

Ms. Wivell served as the executive director of the New Hampshire Aerospace & Defense Export Consortium, is a board member of the New Hampshire World Affairs Council, the Granite State District Export Council, and is a member of U.S. Senator Jeanne Shaheen's Small Business Advisory Council, member of the NH steering committee of the Washington D.C. based U.S. Global Leadership Coalition, the Advisory Board of the Graduate School of International Management of Southern New Hampshire University, the NH International Trade Advisory Council, an advisor to the Urban Solutions Institute of Indonesia, and a member of the NH steering committee for the national Fix the Debt Campaign, as well as former board member of the New Hampshire Tech Alliance. Dawn is the New Hampshire state Chair for CARE (care.org), the recipient of the NHITA Excellence in Trade Award, the national Vision 2000 Award, The Aurora Award for documentary work, the SBA's New Hampshire Small Business International Trade Advocate of the Year Award, and has been certified by the National Association of Small

Business International Trade Educators (NASBITE), as a Global Business Professional. In addition, Dawn has appeared several times on the list of New Hampshire's Most Powerful Women, and was voted one of New Hampshire's "Top Influencers" in 2012. In June 2014, Dawn was honored to receive the World Affairs Council of New Hampshire inaugural Global Leadership Award, recognizing leadership in promoting international knowledge and understanding in our community and expanding the state's global connections.

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Charles Thomas Wolf

Professional Summary

Retired Navy Captain, (SEAL) with over 35 years of experience within the U.S. Military, the Defense Advanced Research Projects Agency (DARPA) the Department of Homeland Security (DHS) the Defense Logistics Agency (DLA) and the Commercial Technology Sector.

Joint Staff Officer, Joint Specialty Officer, Harvard Fellow, Naval War College JPME, Bachelor's degree in History from UCLA.

Advisor to the Chairman of the Joint Chiefs of Staff.

Most Recent Professional Activities

- August 2018 - Present. Co-founder and CEO of Virtual Innovations INC. A technology consulting firm. Consultant to LSI Technology Proposal development. Consultant to Technical Assent supporting requirements development, technology discovery, test plan development and integration of emerging technologies for Defense Logistics Agency J62 Research and Development.

- March 2017 - March 2018. Senior Advisor BMNT LLC. Provided strategic analysis to companies, investors and government agencies operating in defense, homeland security and other related sectors. Conducted analysis of contracting and acquisition strategies for targeted business sectors. Developed Urban Resiliency curriculum for University Application and partner city resiliency focused workshops. Supported Economic Development plan, city of Anchorage (developed an initial development proposal with costs, positions, salaries, Anchorage technology incubator and industrial skills learning center). Supported Navy Research Laboratory "Launch Alaska" technology incubator with University of Alaska Anchorage and Fairbanks. Supported Developed BMNT curriculum for Resilient Cities.

- February 2016 - March 2017, DHS. Senior Executive, (Temporary Appointment) Department of Homeland Security, Science and Technology Directorate, Office of Public and Private Partnerships. Supported the delivery of emerging technologies, capabilities, and methods to the Homeland Security Enterprise. Supported operational experimentation in: screening at speed, cyber-security, first responder of the future, resilient communities, and operational decision making within complex environments. Developed technology acquisition and technology sharing partnerships with over 100 traditional and non-traditional business partners.

- January 2012 - October 2015. DARPA. Senior Executive, (Temporary Appointment) Deputy Director of the Adaptive Execution Office. Responsible for the introduction and transition of emerging technologies to Department of Defense agencies and partners. Supported the Defense Threat Reduction Agency Combating National Threats portfolio.

- Navy Captain with over 27 years of experience at all levels of leadership.

Education:

- BA History University of California, Los Angeles
- Joint Professional Military Education (Masters) Naval War College
- National Security Fellow Harvard, Kennedy School of Government

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Blake T. Heywood

TECHNICAL SKILLS

- Illustrator
- Photoshop
- InDesign
- Logo Design
- Layout Design
- Typography
- HTML & CSS

PROFESSIONAL EXPERIENCE

LSI - Graphic Designer – 2019-Present

- Design and layout needs including infographics, flyers and posters, social media branding, and event signage.

Forthgear – Senior Graphic Designer – 2017-2020

- Design and layout needs for various clients including infographics, brochures, flyers and posters, social media branding, and event signage.

Young Living Essential Oils – Graphic Designer – 2015-2017

- Design and layout of various marketing materials for Canada market, including product catalogues, flyers, social media ads and promotions, and event pieces.

Senior Production Artist – Game Gear – 2013-2015

- Design and layout for sports team logos, rosters, and overall look of team apparel
- Management of production team and overall duties

Quick Wits Comedy – Graphic Designer – 2013-Present

- Design and layout of fliers, ads, and tickets for sales and marketing purposes and overall team branding

The Empress Theatre – Graphic Designer – 2012-2013

- Design and layout of playbill program for season shows

Btrue Design – Personal Freelance – 2012-Present

- Design and layout of various projects including personal and small business logos and overall branding, advertisements, posters, and banners, wedding announcements, and some web design.

EDUCATION

Utah Valley University – Graphic Design – 2009-2013

- Senior coursework in Graphic Design program including Typography, Digital Imaging, and Web and Graphic Design.

Art Institute of SL – Graphic & Web Design – 2007-2009

- Emphasis on Graphic Design and some Web Design.

SL Community College – Associate of Fine Arts – 2005-2007

- Emphasis on Graphic Design and some Web Design.

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Jake Howard

Professional Summary

I have studied organizational communication and business management throughout my educational career at CSU Channel Islands. I have gained years of experience and knowledge through my professional work experiences. My communications and research background has equipped me with the proficiency of conducting research, analyzing results, and preparing detailed report findings on varying special topics. My education has enabled me to develop an impressive skill set with communicating orally and in writing. I possess interpersonal relationship behaviors that allow me to establish and maintain effective working relationships with my co-workers and the general public. I have considerable expertise with principles and techniques of administrative analysis, organizational strategies, staffing procedures, public relations tactics, and the training and education of personnel administration. I have astounded accomplishments of graduating Magna Cum Laude and being a member of the National Communications Honor Society: Lambda Pi Eta (LPH). I am ready for the challenge and to put in the hard work to make sure the duties are performed with a positive attitude and systematic work ethic.

Work Experience

Office Assistant III - Ventura County Health Care Agency - Simi Valley

- Customer service
- Records maintenance
- File maintenance
- Document production
- Case management/processing
- Utilizes computer software system for patient and employee records (Compliance Manager, Avatar)
- Computer utilization for production of routine reports, correspondence letters/documentation, and forms (Word, Excel, Adobe, Google)
- Data entry, updates, and extraction of stored information using computer equipment
- Creation of a variety of documents from drafting to final production. Documents include: Correspondence, emails, standard forms, charts, spreadsheets, proposals, specifications, and reports originating from written, recorded, printed sources, and verbal instructions.
- Proofread typed material for correct and proper grammar, spelling, and punctuation
- Preparation, validation, processing, and checking a variety of documents such as permit applications, client or project records, personnel/payroll records, requisitions, and invoices for completeness, accuracy, and submission standards
- Receives assigned clients and answers telephone calls
- Determining how incoming calls should be routed & directs people to appropriate offices, or clients to proper information sources
- Answering routine questions; explaining routing procedures, processes, or departmental activities
- Appointment scheduling, training, and examinations
- Obtains routine factual information to create or update files
- Provides assistance in the completion of forms
- Sorts and/or files materials such as correspondence, contract documents, and client case information

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Lauren Layne

Skills

- In Design
- Illustrator
- Photoshop
- Google Analytics Certified
- Facebook Community Manager Certified
- Written & Visual Communication
- Data Analysis
- Leadership Qualtrics
- Sprout Social
- Woolly
- Social Media Influencer Management Video Editing

Professional Experience

LSI – May 2021 – Present

Social Media Communications Specialist – Layton

- Manages external and internal communications
- Builds and executes a social media strategy for the company and executive leadership
- Collaborates with web designers to create company website content and marketing collateral
- Manages company social media including Twitter, Facebook, Instagram and LinkedIn
- Creates content, including all forms of marketing collateral, web copy, social media content, presentations, newsletters, event messaging and speeches
- Participates with the employee relationship committee to generate, edit and publish monthly content that builds meaningful connections for internal and field employees
- Assists as needed on client related writing projects
- Manages messaging, branding and communications for corporate and client events

Fundraising Project Manager – spring 2021

Excellence Concerts Project – Provo

- Lead a team of 3 individuals to create a well-designed and persuasive pitch deck to increase new donations from new sponsors and donors
- Contacted and began developing new relationships with 16 new donors about becoming official sponsors

Content Intern – Aug 2020 – April 2021

Penna Powers – Salt Lake City

- Wrote and created curated social media content for prominent clients in Utah and Nevada, such as the State of Utah COVID-19 Response Team, Zero Fatalities, and Ivory Homes.
- Increased the State of Utah's COVID-19 Response Team online audience by 150% over the course of eight months
- Implemented new technological standards and processes for social media influencer management and tracking
- Analyzed and improved SEO data to increase website traffic and track consumer navigation paths
- Conducted over 15 social media listening audits and analyzed over 1.5 million messages and comments.

Special Sections Writer and Coordinator – June 2019 – Aug 2020

The Daily Universe – Provo

- Wrote over 30 articles of unique content that contributed to the overall brand image and sales

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Brooke Staples

Professional Summary

As a writer and an educator with over 15 years in higher education, Brooke has the ability to write in multiple genres and to conduct strong research. Content analysis and the application of effective writing strategies is central to her work and writing style. She also understands effective communication patterns with clients, co-workers, students, and others. Brookes 15 years as the Director of Developmental English at Weber State University has provided her with sound leadership and management skills

Employment History

LSI – Grant Writer – January 2020-Present

- Currently as the lead for Fesora, I have written multiple funding opportunities for an online teaching platform. I also work with the owners of Fesora in establishing innovative ways to move their product.
- During my time at LSI, I have written approximately 5 educational grants/studies.
- Worked with Northern Utah's Economic Alliance with four studies specific to Northern Utah.
- Served as the junior writer on the Shoshone Warehousing feasibility study.
- For a few months, I worked on the DOCA Committee, and I worked with the team to build and present information via a webinar.
- Wrote a grant about a potential funding opportunity in New Mexico.

Webster State University – Director of Developmental English – August 2003-Present

Courses Taught

- English 0900: Fundamentals in English
- English 0955: Developmental Reading and Writing
- English 1010: Introduction to Writing
- English 2010: Research Writing
- English 2200: Introduction to Literature

Responsibilities

- Teach a full-load of English classes each semester that focus on basic reading, writing and critical thinking skills.
- Build, create, and facilitate online classes so they fulfill university goals and objectives.
- Collaborate with Assistant Provost, Eric Amsel, to build co-requisite program Wildcat Scholars.
- Evaluate retention strategies and create goals that align with students' needs.
- Write proposals for university and departmental funding projects.
- Serve as a committee member for multiple diversity initiatives.
- Support students to reach academic, professional, and personal goals.
- Enrolled in Master Online Certification Program and Blended Learning Program at Weber State University.
- Participate in tutor training as an instructor.
- Assess program curriculum so it meets university and national standards.
- Work with Director of Composition to ensure students move from Developmental English to Composition with high retention and success.
- Chair National Accreditation Developmental Education (NADE) committee at Weber State University with a focus to keep accreditation current.
- Hire and train new Developmental English adjuncts.

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3. Approach to Scope of Services

A. Work Plan and Approach

I. LSI's Focus for this Project

LSI's focus for this project is to assist Foster City in their effort to revitalize and implement a long-term plan for economic development. Economic development services and procedures will be driven by the City's Vision and Mission stated in the *City of Foster City Economic Development Strategic Work Plan FY 16/17 to FY 17/18*. With the five major Guiding Principles, a baseline is in place and the foundation for economic development has been established. LSI's approach will be to take the current baseline principles, assess current procedures, assess the outcomes of the aforementioned plan's activities, identify gaps, and bridge current goals with new goals to support vision and mission.

II. The following information demonstrates the LSI's method for management, schedule, control, and responsiveness:

Economic Development Staffing:

LSI will provide staff persons who will be responsible for delivering economic development services for the City for up to twenty (20) hours per week. These services will be provided primarily by the Project Manager and the Systems Architect with a combination of both virtual and physical presences. The Systems Architect resides in Piedmont, California and will be physically present as needed. The Project Manager will be physically present when necessary. All staff will be available at all times. In addition to the traditional economic development areas of assistance, the LSI team will follow a phased approach to the strategic development as follows:

Phase One: For the initial phase, the LSI team will meet with Foster City's economic development team to discuss the status of the economy – particularly given the impact of COVID – assess the outcome of the previous economic development strategy and discover what baseline information and data is available. We will assess and re-validate the objectives of the previous strategic plan.

- Establish end user needs
- Introduce the problem solving methodology
- Conduct an evaluation of existing City plans
- Perform a gaps analysis
- Assess the accomplishments of previously established programs
- Assess the shortfalls of previously established programs

- Identify gaps in existing plans
- Define the root problems associated with these gaps
- Prepare and deliver status and pathway to senior stakeholders

We will determine the need for an asset mapping exercise, a SWOT analysis, and the development of a robust economic development ecosystem. Based on the aforementioned, we will ascertain what subject matter experts we will bring to the table, and the extent to which we need to communicate further within the community. In other words, should we: perform a full asset mapping and SWOT analysis or should we simply update existing data with a survey or other tool? Please see Optional Services for further notations on Asset Mapping and SWOT Analysis.

Phase Two: During the second phase, team members will curate data and information through the tools and exercises decided upon during Phase I. Said activities will be based and built upon the five pillars that exist in the current Strategic Work Plan. The exercises will:

- Evaluate the economic development ecosystem, including exterior resources
- Curate Problem ideation
- Curate Solutions ideation
- Compare “on ground” truths with the assessment of accomplishments of previously established programs
- Compare “on ground” truths with the assessment of shortfalls of previously established programs
- Identify “on ground” gaps
- Further define root problems (compare previous assessments with “on ground” truths)
- Identify consistencies
- Identify inconsistencies
- Prepare and deliver status and pathway to senior stakeholders

The team will validate local, regional, and national objectives as we investigate plans, grants, and additional funding sources. During this phase, community members will drive the process with an understanding that Foster City continues to be “The Place” to live, work, and play. However, communities and resources change rapidly, and it is imperative for Foster City to lead as the progressive, innovative, and forward-thinking community that it is. Creating a data profile for Foster City will provide context to all economic development decisions, and the profile will identify key demographic and economic information.

Phase Three: This phase will be focused on strategy development. With all of the data and information gathered in Phase One and Phase Two, a pathway for solution development will be established. Focus groups will be created and will be staffed with subject matter experts. Each group will be working towards a specific

strategic economic development goal based on the five major Guiding Principles. In developing a Solutions Development Pathway, we will:

- Refine list of problems identified through curated problem ideation
- Refine proposed solutions identified through curated solutions ideation
- Develop a list of recommended actions to be taken in order to ensure that successful programs continue to receive the necessary support required to ensure continued success
- Develop a list of recommended actions that will correct deficiencies as identified through this review
- Establish a potential Solutions Development Pathway
- Prepare and deliver status and pathway to senior leader stakeholders

Phase Four: Phase Four is the evaluation phase. A close assessment of the Focus Groups and the Action Plans will determine which part of the process worked and identify where changes need to be made. Some of the assessment strategies used during this phase of evaluation include (but are not limited to):

- Survey and/or SWOT analysis and/or Asset Mapping with distributions to all of the major contributors assigned to Foster City's economic development plan.
- Ask partners if action plans had been implemented. Record the results
- Identify action plans that worked
- Identify action plans that need to be altered
- Identify what additional assistance and support is needed.
- Determine a rollout pathway
- Determine Risk Tolerance
- Identify project's vulnerabilities
- Identify follow-on activities

A report will be drafted explaining all exercises, activities, outcomes and results. Foster City will determine how the report will be distributed. In addition to the writing of the report, LSI can assist in the graphics, distribution, press releases, social media posts, and organization of a Town Hall event, if so desired.

Summary of Work Plan and Approach:

LSI maintains a global network of consultants, consulting services, and additional team members. LSI manages conflict resolution among participants assigned to any project when problems arise. LSI understands that all projects will have unanticipated problems, so we are prepared with additional subject matter experts ready and trained to directly address conflict and resolve issues. Economic development, with all of its layers and complexities, is something all LSI team members are familiar with and fully prepared to support.

LSI is a mature organization staffed with seasoned business development executives, former high-ranking government officials, and senior civilian executives. All have experience with federal and commercial contracting, acquisition, small business development, program management, business strategy, and technology development and transition. LSI personnel have professional relationships at local, state, and federal levels. This depth of experience and expertise keeps projects moving forward despite obstacles that may arise. Efficiency is key; therefore, LSI's business model is built upon its people, experience, and relationships that limit frivolous spending and needless spending.

III. Needs/Expertise from City Staff:

The success of any plan depends upon the people that develop and support its implementation. This is especially important as the Foster City Economic Development plan takes shape.

LSI fully appreciates that an effort such as this, can be disruptive to the day-to-day operations of the city. It is our intent to minimize this impact to the greatest extent possible, but we must maintain the reasonable expectation that city staff members will be available to assist with and to guide this project.

This proposal describes the project approach as occurring during 4 phases. During each phase, some level of staff representation will be required.

Phase One: Phase One will require the greatest level of City Staff Participation. LSI will need access to the obvious data, reports, and other sources of information to perform the tasks outlined. In addition, it will be critical to speak with staff about the economic base and various industry sectors. We will require staff time when we are ready to provide findings and recommendations.

IV. Additional “Value-Added” Services:

The following services are highly recommended and may partially or even wholly fit into the main service period of 20 hours/week. They are being mentioned in the event additional time is required.

Determining and analyzing what the City already possesses that could be leveraged better to build the capacity for growth, including competitive cultural, economic, technological, intellectual, and physical assets, is critical to developing the strategic direction and implementation plan to promote economic vitality. Leveraging assets refers to using the activities and engagement of business, government leaders, and other stakeholders to maximize your economic potential.

In the event, this has not already been done or needs to be updated, we would recommend that an asset mapping and SWOT analysis be performed. Essentially, the key purpose is to determine the following:

- **State of Foster City's Economy.**

What are the strengths and weaknesses? What are the strong existing and growth sectors? Which areas are most distressed? What is driving job creation or loss and the state of economy in general? What are the City's assets?

- **Industry Sectors and Clusters (including regional).**

Which clusters, and industries and occupations within the cluster, are growing and declining, and why? A cluster is a geographic concentration of firms, workers and industries that do business with each other and have common needs for talent, technology, and infrastructure.

- **External Trends and Forces.**

What are the opportunities and threats? How is the City positioned to succeed in the national and global economies? What sources of exports and tourism, as well as foreign direct investment, can bring new wealth to the region? What industry sectors and clusters have growth potential through international trade and investment, and what are the region's target foreign markets based on these industries? What local public, private and nonprofit partnerships have been developed to promote exports and increase the region's export base? What are the strategic needs or gaps to fully implement an export promotion and investment attraction program (e.g., foreign outreach events, marketing materials, and research; and regional transportation infrastructure or regulatory issues)?

- **Asset Mapping.**

An asset inventory can be a valuable development tool for community leaders and economic developers. An asset inventory identifies those assets that are financial, political, human, educational, institutional, connective, cultural, built/infrastructure, natural/environmental and social. It is valuable to:

- Identify community resources
- Build a foundation for strategic planning and implementation
- Deepen understanding of key regional systems and networks
- Become a catalyst for developing partnerships between community organizations

Because innovation drives growth, increased productivity, and prosperity, we will examine the potential in Foster City of the innovation-based economy. The asset base incorporates many common criteria for corporate location decisions, but also

include many other factors that are not as widely measured but are important to innovation.

- **SWOT Analysis.**

The SWOT Analysis would provide an in-depth analysis of community strengths, weaknesses, opportunities, and threats. It will answer the question, “Where are we now?” by using acquired data and background information to help identify the critical internal and external factors that speak to Foster City’s unique assets and competitive positioning. It is a strategic planning tool used to ensure that there is a clear objective informed by a comprehensive understanding of Foster City’s capabilities and capacity. Essentially, the SWOT analysis identifies the city’s competitive advantages—those indigenous assets that make Foster City special or competitive in the national and global economies—juxtaposed against those internal or external factors that can keep the city from realizing its potential.

In addition, the SWOT analysis should consider economic resiliency. Specifically, what factors and/or elements are in place (or need to be put in place) to ensure the long-term success, viability, and durability of the economy?

In terms of this particular exercise, the SWOT analysis elements would be understood in the following terms:

- **Strengths** are the City’s relative competitive advantages (e.g., industry supply chains and clusters, extensive port, rail, and broadband assets, specialized workforce skills, higher education levels, collaboration among stakeholders)
- **Weaknesses** are the City’s relative competitive disadvantages (e.g., a risk-averse or change-resistant regional culture)
- **Opportunities** are chances or occasions for improvement or progress (e.g., expansion of a research lab in the area)
- **Threats** are chances or occasions for negative impacts on the region or regional decline (e.g., several companies considering moving to lower-cost areas)

Having numerous and even high-quality assets is not sufficient to drive growth. Assets must be linked to support innovation-based growth. For example, ideas generated by university researchers, while valuable from a purely intellectual standpoint, must be translated into new products or services to reach their full potential for economic development. Collaborative economic development partnerships involve leaders from government, business, education, the arts, tourism, non-profits, and so forth.

- **Ecosystem Development.**

We would strongly recommend that Foster City develop an economic development ecosystem. What is important about the concept of an ecosystem, and its growing usage, is that it shows a shift in how society thinks of economic value. It shows that individuals matter and that their actions can transform industries and even the entire world; however small. An ecosystem is about dynamic interactions. It's about how people meet, talk, share, collaborate, team, experiment and grow together. When an ecosystem thrives, it means that the people have developed patterns of behavior or a culture that streamlines the flow of ideas, talent, and capital throughout a system.

Surprisingly, one of the most often stated a criticism in community endeavors is the lack of communication. When that is taken seriously and a functional ecosystem is created, it is amazing what can be accomplished. It is also very key to the branding of a City and something that showcases a unique culture and a vibrant economy. It provides for a system for communication, cross marketing, leveraging of resources and branding, and it represents a cross section that is inclusive, diverse, compelling, and will drive growth as well as innovation.

- **New Market Development**

In the event that Foster City decides to focus on specific market development, LSI is highly qualified to provide expertise in the following areas:

- Export Development
- Foreign Direct Investment
- Government Procurement
- Cluster and Consortium Development
- Target Market Development

<p>Focus Group</p> <p>1</p> <p>Strategically maintaining and nurturing relationships with existing business community members and stakeholders.</p>	<p>Focus Group</p> <p>2</p> <p>Sustaining and creating a healthy business environment focused on safe environmental practices.</p>	<p>Focus Group</p> <p>3</p> <p>Supporting Foster City's workforce through sound training and educational opportunities.</p>	<p>Focus Group</p> <p>4</p> <p>Investing in both commercial and residential infrastructure.</p>	<p>Focus Group</p> <p>5</p> <p>Identifying and solving current and future transportation issues for Foster City residents.</p>
<p>ACTION PLANS <small>(include but are not limited to)</small></p> <ul style="list-style-type: none"> • Invest in strong economic hubs throughout Foster City. • Balance investment through different sectors such as housing, services, and amenities. • Cultivate partnerships and business with specific targeted attention. • Increase support and sustainment for local business. 	<ul style="list-style-type: none"> • Secure adequate land and space that is business ready. • Innovate additional businesses that are high-tech that are moving out of Silicon Valley into places such as Foster City. • Foster strong leadership and support through appropriate incentives and structures. • Identify how employment is affected positively or negatively when considering carbon emission, pollution, energy efficiency, and resource efficiency. • Enhance resources that prevent loss of biodiversity and ecosystem services. 	<ul style="list-style-type: none"> • Accommodate the current and future workforce by providing sufficient land, space, and housing options. • Provide current and future workforce with appropriate training and education. • Retain students that are trained in Foster City to integrate into Foster City's workforce. • Communicate with surrounding cities and communities to collaborate in education and training (awareness of the broader impact). • Build additional community infrastructure to support the needs of current and future workforce. • Spread aware through the community in regards to opportunities available. • Pursue additional state and federal funding for the workforce. 	<ul style="list-style-type: none"> • Streamline application procedures for all commercial and residential building permits. • Sustain and protect Foster City's base in regards to natural environment and resources. • Explore different housing resources and options for residents, both business and personal. • Construct market-rate housing now during the down cycle and post-effects of the pandemic. • Develop programs that enable organizations such as non-profits or socially driven entities to purchase land for permanent affordable housing. • Pursue additional state and federal funding that has been allocated in the rebuilding of communities who have been significantly impacted by the pandemic. 	<ul style="list-style-type: none"> • Assess economic productivity based on the output of goods and services per dollar of private and public investment. • Identify transportation bottlenecks as a large percentage of Foster City residents commute to surrounding cities and examine how to increase the flow effectively. • Create programs and incentives for Foster City residents who are committed to the decrease of pollution and greenhouse gases emitted. • Find additional funding opportunities that support and sustain transportation infrastructure that already exists. • Expand safe transportation options (such as additional lanes or thoroughfare) for pedestrians or cyclists. • Partner with surrounding cities and communities strategize a networking system that supports Foster City and all surrounding areas. • Analyze the correlation between demographics and transportation accessibility for all residents.

B. Schedule

Described in the “Work Plan and Approach” section of this document, our processes will develop in phases (Phase One, Phase Two, Phase Three, Phase Four) with specific goals and objectives for each phase. The following schedule identifies the amount of time allotted for each phase. These figures are approximate; therefore, the team is flexible and adaptable to extending or reducing the amount of time dedicated to each phase if the goals and objectives are completed sooner or more time needs to be allocated.



Phase One: Initial Kick Off. This phase will span over approximately 3 days. Key leaders will participate along with Focus Group leaders.

Phase One Follow on Engagements: 30 hours. (One meeting per week/per focus group). Each meeting will be approximately 2 hours in duration each.

Phase One will require the greatest level of City Staff participation. Initially, LSI would request a group session in order to meet with current members of Foster City’s Economic Development Team. During this engagement, both parties will identify subject matter experts, introduce team members (both Foster City and LSI), and discuss Stakeholder involvement.

Additionally, final objectives and the plan going forward will be discussed. This plan, with its associated schedule, will be agreed upon and a final timeline should be established.

During Phase One: Key points of contact and subject matter experts will be identified for each of the proposed 5 focus groups. The LSI methodology will be presented and will be formatted to meet more closely with the long-term objectives of each respective team. Additional consideration will be made to ensure that an adequate and effective method of public transparency is also fully determined and agreed upon.

Phase One Follow on Engagements: Follow on engagements between LSI team members and the City Staff are extremely important. These engagements are especially important during Phase One. LSI engagements with City Staff

representatives from each of the 5 focus groups should occur once weekly for no more than 2 hours each time.

These engagements will be fully coordinated with staff participants. LSI will provide a working agenda, notes and any additional working documents that might be required. Detailed notes will be taken and LSI will provide a discussion summary to each individual. Posts will be made within the group's master working file. Meeting agendas should include – follow up to previously discussed issues, - LSI actions, status, timeline to next action, desired outcome, points of contacts, etc.

Focus Group engagements will be consolidated when/where such action makes sense and meetings will last no longer than they need to. Remote access will be encouraged.

Phase Two: Onsite engagement (30 hours)

LSI would prefer that one or more of the Focus Group Team Members from the City Staff accompany the onsite engagements at least initially in order to facilitate introduction of the LSI team, describe the process, set expectations, establish follow on points of contact, methods of collaboration, etc.

Phase Three: Strategy Development (60 hours)

Strategy Development will include a number of working group sessions that are intended to consolidate the data collected during the previous two phases. This data will be analyzed to determine relevance to one or more of the 5 focus groups and will serve as the baseline for the development of a working “draft” strategy plan.

Phase Four: Evaluation Phase (40 hours)

The Evaluation Phase will serve to determine the progress of the planning effort. Development of a viable strategy, implementation plan and most importantly, a method of evaluation. Additionally, a determination of a way ahead will be made.

Key Stakeholder engagements will occur throughout each of the phases. These engagements, ideally in a group setting, will ensure that the process is on track and that full transparency is maintained as determined by the city.

A more formal level of engagements should occur at least quarterly, with smaller, less formal engagements at each mid quarter. Monthly updates will be distributed electronically and all named participants will have full access to the master-working file.

4. Cost Proposal

EXHIBIT B CONSULTANT'S FEE SCHEDULE

Average Hourly Bill Rate: \$195.00
Burdened Hourly Pay Rate: \$149.50

Proposed Hours:

Initial Kick Off: 43 hours inclusive of several staff members \$ 8,385
Quarterly Status Updates x 4 @ 40 hours \$ 7,800
Up to 20 hours/week economic development services \$202,800
We anticipate that the Phase 2-4 work can be covered
Within the 20 hours/week

Total Travel:
(GSA rates) \$ 18,000

Printed Materials: \$ 2,000

TOTAL ANTICIPATED COST: \$238,985

OPTIONAL SERVICES ARE PROVIDED AT THE SAME RATE AS ABOVE STATED.

5. Qualifications Details:

a. LSI has over four decades of economic development experience, and our reach stretches to regions/states all throughout the United States. The following are examples of prior and current economic development projects LSI has been a part of:

Defense Alliance-Advanced Power and Energy Cluster

Time Period for the project: 2004-Present

Founded in 2004, the regional cluster operated as a small business (Minnesota Wire). The cluster was originally funded by the SBA RIC program as one of the original three Advanced Defense Technologies (ADT) clusters and functioned under this model from 2011-2016. In 2017, The Defense Alliance-Advanced Power & Energy project was created and quickly became an example of the modern genesis cluster concept that has contributed to the significant innovation of the cluster “art”. Such contributions include an industry-centric model that combines an overlay emphasis for business and economic development through federal agency contract opportunities. LSI has been a leader in policy advocacy and partnering along with small business cluster creation and management. Our extra-regional outreach bolsters resources and provides our team the ability to share best practices through nationally attended webinars. Since September 2010, LSI has partnered with the Defense Alliance and has experienced great success:

Revenue Gained for Member Companies	\$220,609,702
Job Created (estimated/known)	2,104/312
New Businesses Created	13
Cooperative R&D Agreements Signed	3
Members (Defense Alliance/APC)	872/216
Businesses Assisted (training/counseling/finance)	3,322/1,678/567

Governor’s Office of Economic Development (GOED)

Time Period: 15-year partnership

LSI’s has a 15-year partnership and relationship with the Governor’s Office of Economic Development (GOED) and Utah’s Procurement Technical Assistance Centers (PTAC). LSI’s key contribution to the partnership is an integrated approach to assisting small businesses. Since 2006, The LSI/GOED/PTAC alliance has helped Utah companies win \$3.9 billion in new business and has created more than 78,000 new jobs. This program has been successful because we have had direct contact and communication with leaders and managers at all levels of GOED and PTAC, and the LSI response to the new PTAC RFP is a natural extension of our continuing work to build and enhance Utah’s economy. Some of the strategies that have proven success include:

- Market evaluation and assessments to determine if opportunities align with the company's technical core.
- Contract administration
- Insights into critical bid/no-bid decisions.
- Capture strategy to respond to opportunities with a value-based solution.
- Gathering market research.
- Upon referral, capture support and business intelligence to help clients react quickly to changing events.

LSI's consultants help clients gain access to the tremendous opportunity of government contracting. They also help position clients for ongoing contracting work by providing guidance on high-scoring methodologies and best practices and assisting in every element of execution.

LSI's documented PTAC success has exceeded program requirements and initial projections. LSI has identified hundreds of teaming agreement opportunities and held dozens of training and outreach events, resulting in billions of dollars in new contract awards for Utah companies.

	Number of Contracts	Awards Totals	Cost of LSI Services	ROI
FY 16-17	391	\$158,022,032	\$1,541,065	99%
FY 17-18	363	\$81,734,389	\$1,500,000	98%
FY 18-19	374	\$203,282,935	\$1,500,000	99%
FY 19-20	503	\$133,757,869	\$1,487,500	99%
FY 20-21*	369*	\$92,861,236*	**\$737,500	
Total	2,000	\$576,797,225	\$6,028,565	

* Through February, 2021

** Through June, 2021

Program measures for the current contract period.

6. References

A. CAL FIRE

1416 9th Street
Sacramento, CA 94244

b. Time Period for the Project: 2000-Present

c. Brief description of scope of work

LSI has been the exclusive Aviation Logistical Support Contractor for the California Department of Forestry and Fire Protection (CAL FIRE) at their Aviation Management Unit (AMU) continuously since 2001. CAL FIRE AMU maintains and operates a fleet of over 52 Wildland Firefighting Aircraft that includes S2T Air tankers, OV10 Aerial Tactical Command & Control fixed wing aircraft and Super Huey UH-1H Helicopters, along with additional Program Support Aircraft. The S2T Air tankers and OV-10 Tactical assets are deployed at various CAL FIRE Air Attack Bases statewide during the fire season (May to November) while the Helicopter assets are deployed year-round at various statewide Helitack airbases, due to additional non-fire related emergency rescue tasking. LSI employees work alongside the CAL FIRE AMU staff in their depot level aircraft maintenance facility located at McClellan Park near Sacramento, California, or as needed at various state-wide locations. LSI's current staffs 22 full-time employees.

The primary function of the LSI contact with CAL FIRE is adequately maintaining the inventory of thousands of rotable (repairable) aircraft components, consumable parts, fasteners and general supplies needed for depot level aircraft fleet maintenance. Increasing the difficulty level of this logistical effort is the fact that each CAL FIRE aircraft are surplus military equipment that was built in the 1960's thru the 1980's and are no longer supported by the DOD federal supply system. There is a significant consortium of businesses required to maintain the CAL FIRE mission and operations. Since 2001, thru LSI's Logistics Support management analysis and planning efforts there have been several examples where LSI's participation has made the difference. Solving these complex issues involves continual coordination with several hundred suppliers, vendors and contractors who supply CAL FIRE's program with new or overhauled components and various technical or engineering services.

Additionally, LSI manages the acquisition requirements with the consortium team on businesses. Working with several hundred suppliers and contractors, LSI manages an average of 300 requirements per month supporting new commodity purchases and various types of repairs, calibrations, technical and engineering services. LSI creates and manages both the CAL FIRE (State) and LSI purchase orders for our customer.

Additionally LSI manages the critical overhaul and repair flow of high value aircraft assets by coordinating with specific consortium members to ensure that acceptable inventory levels of spare aircraft components are always maintained.

Additionally LSI provides readiness reviews for the operation readiness of all twenty-two CAL FIRE aviation field consortium bases. These readiness assessments drive consistency throughout the state at the various locations from a regulatory perspective and to provide on-the-spot corrective actions and planning. LSI has been a part of this process since its conception and has continued to provide this service annually.

d. Contact Name: John Firebaugh
john.firebaugh@fire.ca.gov
(916) 812-7230

B. Aero Montreal

380, Saint-Antoine street West, suite 3120
Montréal (Quebec)
Canada H2Y 3X7

b. Time Period for the Project: 2000-Present

c. Brief description of scope of work

Established in 2006, Aéro Montréal, the Quebec aerospace cluster, is a strategic forum that brings together the top leaders of the Quebec aerospace sector from industry, educational institutions, research centers, associations, and unions. Aéro Montréal's mission is to bring together all the players in the sector around common objectives and actions in order to increase its cohesion and to optimize the competitiveness, growth and influence of the aerospace cluster, in order to that it remains an even more important source of wealth creation for Montreal, Quebec and Canada. Over the years, Aéro Montréal's strategic action plan has provided for the launching of several projects, namely that of the supply chain, succession and workforce, innovation, image, visibility and influence, defense and national security as well as marketing and development.

Start Aero 360 is a special project that promotes the integration and commercialization of disruptive technologies in the aerospace supply chain. Quebec's aerospace supply chain is experiencing an acceleration in its transformation with growing market pressures. As technology companies (startups and SMEs) are the primary sources of innovation, it is essential that their technological developments be supported in their pre-commercialization phase. This will promote the sustainability of the latter and the pool of innovation that they represent. This is a 3 year project, supporting the deployment of 30 SMEs.

LSI provides U.S. market access, development, and capture services. This ranges from opportunity identification to market research to marketing materials to pricing strategies to teaming to certifications to whatever is required to do well in the U.S. market either commercially or in the U.S. government supply chain. Services include a running opportunity pipeline, one-on-one counseling, training webinars, participation in trade shows, assistance with trade missions, and updates and advisories on the U.S. aerospace and aviation market also for the general membership.

d. Contact Name: Pauline Breyton
paulin.breyton@aeromontreal.ca
(514) 987-9333

7. Acknowledgment of the City's Agreement for Professional Services



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/6/2021

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

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

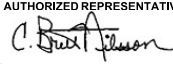
PRODUCER The Buckner Company 2225 Washington Blvd, Ste 210 Ogden UT 84401	CONTACT NAME: Ashley Cockrum PHONE (A/C, No, Ext): 801-866-0825 FAX (A/C, No): 801-365-0841 E-MAIL ADDRESS: ACockrum@buckner.com	
	INSURER(S) AFFORDING COVERAGE NAIC #	
INSURED Logistic Specialties, Inc. LSI Business Development, Inc. 1530 North Layton Hills Parkway, Suite 201 Layton UT 84041	INSURER A: The Travelers Indemnity Company of America 25666	
	INSURER B: Travelers Casualty and Surety Co of America 31194	
	INSURER C: Travelers Property Casualty Company of America 25674	
	INSURER D: _____ INSURER E: _____ INSURER F: _____	

COVERAGES **CERTIFICATE NUMBER:** 2108189870 **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	P6602B655390TIA21	1/25/2021	1/25/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COM/OP AGG \$ 2,000,000 \$
C	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y		BA8M3546022143G	1/25/2021	1/25/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP9H6573532143	1/25/2021	1/25/2022	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
C	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	UB9J1266422143G	1/25/2021	1/25/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Professional Liability			0105544416	1/25/2021	1/25/2022	Occurrence Limit \$1,000,000 Aggregate Limit \$1,000,000 Retention \$10,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Certificate Holder is Additional Insured per the Commercial General Liability coverage only per form CGD246 (04-19).
 Blanket Waiver of Subrogation per the Commercial General Liability in favor of certificate holder per form CGD467 (02-19).
 Certificate Holder is Additional Insured per the Commercial Automobile Liability coverage only per form CAT353 (02-15).

CERTIFICATE HOLDER City of Foster City/Estero Municipal Improvement District City Manager's Office 610 Foster City Boulevard Foster City CA 94404	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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